

## **Webinar Q&A**

### **Q: Where can I find release notes and updated documentation?**

A: All release notes, updated documentation, and the session recording will be posted in GOsupport. 1:54

### **Q: What should I do if I receive a Microsoft Business Central extension compatibility warning?**

A: If the extension is akoyaGO, you can ignore the warning; the team has it covered. 3:02

### **Q: What is the new subgrid feature for letter templates?**

A: You can now embed up to three subgrids of child records directly into letter templates, replacing the need for Power Automate flows. This is useful for including related data like payments or requirements in letters. 4:27

### **Q: How do I set up subgrids in a letter template?**

A: Add merge fields for subgrids, configure the subgrids tab by selecting related tables and views, and limit columns to five for best results. Preview the template to ensure correct rendering. 5:31

### **Q: Can reviewers download their own review responses?**

A: No, the new download feature only allows downloading application PDFs and attachments, not reviewer responses. 14:28

### **Q: What are the new GOapply review group download settings?**

A: Reviewers can now download the application PDF and individual attachments if enabled. Hidden files remain inaccessible. 11:08

### **Q: What is the new Review Responses by Reviewer report?**

A: It allows grouping review responses by reviewer for better tracking and analysis. 12:48

### **Q: How are questions named in GOapply now?**

A: When dragging a field into GOapply, the question is auto-named to match the CRM label, reducing manual work. 14:00

### **Q: What is the refund/reversal date change in accounting?**

A: The refund or reversal date now defaults to the current date, but can be overridden. 16:22

**Q: How does the Fund Acknowledgement Name field work?**

A: It auto-populates as "anonymous" if the fund/request is marked anonymous; otherwise, it uses the formal name. 16:58

**Q: What validation is added to the Send to Accounting workflow?**

A: Payments can only be sent to accounting if their status is blank or error, preventing accidental resubmission. 19:06

**Q: How does organizational donor management work now?**

A: Changing the donor constituent auto-updates the primary contact field to match the constituent record. 19:54

**Q: What improvements were made to CRM merge and coupling?**

A: Merging records is now supported regardless of which record is coupled to Business Central, and alternate keys prevent duplicate numbers. 24:11

**Q: What is the new Create Payment button support in Business Central?**

A: Payments created using this button now sync back to CRM, ensuring all payments are tracked. 25:35

**Q: How can I track GOfund user activity?**

A: A new field on contacts tracks the last sign-in date, visible in the donor portal connections view. 26:56

**Q: What changes were made to GOfund gift and grant history views?**

A: History views now exclude records with error or reversed status for improved accuracy. 27:39

**Q: How is recurring gift error handling improved in GOfund?**

A: Errors are now more visible, automatic retries are discontinued, and staff can manually retry. Donors receive an email on the first error. 30:20

**Q: How are donors identified in Stripe for non-recurring gifts?**

A: Currently, only email addresses are used; passing more information is on the development list. 31:35

**Q: What is the new duplicate detection rule for tax ID?**

A: A new rule (off by default) allows validation of manual record creation based on tax ID and can be customized to include department. 35:29

**Q: What should applicants do if their submission hangs in GOapply?**

A: Save frequently before submitting. If submission hangs, close the browser and log back in. Confirmation or error emails are sent upon submission; if neither is received, contact the foundation. 48:53

**Q: How does the system handle submissions close to the deadline?**

A: Submissions made before the deadline are processed, even if processing completes after the deadline. Support can verify submission times if needed. 53:11

**Q: When will these updates be available?**

A: All features and fixes will be live on the morning of November 21. Users should clear their cache that day. 32:34