

Detailed Recap of the November 2025 Product Update Webinar

General Announcements & Resources

- This product update focused on bug fixes for this release, with a few minor enhancements. Users were encouraged to read the release notes, which will be posted in GOSupport. All release-related resources, including documentation and the session recording, will be available there. Users were reminded to monitor GOSupport announcements for known issues and hotfixes. 1:54
- Microsoft Business Central updates were addressed, specifically noting that deprecated features (like dynamic links in email templates) are being worked on internally, but users should not worry if they see compatibility warnings for the akoyaGO extension. 3:02

akoyaGO App Enhancements

- **Events & Event Attendees Tables for Non-Accounting Users**
 - These tables are now available in the akoyaGO without accounting app, visible on the site map after the update. This allows non-accounting users to manage events and attendees directly. 4:15
 - *Benefit:* Expands event management capabilities to a broader user base.
- **Embedding Subgrids in Letter Templates**
 - Users can now embed up to three subgrids of child records (e.g., payments, requirements) directly into letter templates. This replaces the need for Power Automate flows previously used for this purpose. 4:27
- **Instructions:**
 1. Configure your letter template and add merge fields for subgrids (e.g., `SubgridView:View1`, 'SubgridView:View', 'SubgridView:View3')
 2. Use the new Subgrids tab to select related tables and views.
 3. Limit subgrid columns to five for best appearance.

4. Update and preview the template to ensure correct rendering.

- *Context & Benefit:* Addresses user requests for easier inclusion of related data in letters, especially for gift compilation letters. Reduces reliance on custom flows and improves document automation. 9:48

GOapply Enhancements

- **Review Group Download Settings**
 - Two new settings: Enable review download (lets reviewers download the application PDF) and allow individual attachment downloads (lets reviewers download specific attachments). If files are hidden, they remain inaccessible. 11:08
 - *Benefit:* Gives reviewers more flexibility and access to application materials, streamlining the review process.
- **Review Responses by Reviewer Report**
 - A new report allows grouping review responses by reviewer, aiding in analysis and reporting. 12:48
 - *Benefit:* Facilitates better tracking and reporting of reviewer activity.
- **Comment Question Type in Simple Form Builder**
 - Multi-line pre-mapped fields now appear as comment fields, improving the application experience. 13:25
- **Automatic Question Naming**
 - When dragging a field into GOapply, the question is auto-named to match the CRM label, reducing manual work and errors. 14:00

GOapply Reviewer Download Clarification

- The new download feature is limited to application PDFs and attachments; it does not allow reviewers to download their own review responses. Workarounds include emailing reports or using the new reviewer report. 14:28

akoyaGO with Accounting Enhancements

- **Refund/Reversal Date Default**
 - When initiating a refund, the date defaults to the current date instead of the original posting date, but can be overridden. 16:22
 - *Benefit:* Reduces manual edits and aligns with real-world refund scenarios.

- **Fund Acknowledgement Name Field**
 - Automatically populates as "anonymous" if the fund/request is marked anonymous; otherwise, uses the formal name. 16:58
 - *Benefit:* Simplifies letter generation and reduces the need for separate templates.
- **Send to Accounting Workflow Validation**
 - Payments can only be sent to accounting if their status is blank or error, preventing accidental resubmission of received payments. This validation now applies consistently across all methods. 19:06
 - *Benefit:* Prevents errors and ensures data integrity.
- **Organizational Donor Management**
 - Changing the donor constituent auto-updates the primary contact field to match the constituent record, reducing manual entry. 19:54
- **CRM Merge & Coupling Enhancements**
 - Merging records is now supported regardless of which record is coupled to Business Central. Alternate keys prevent duplicate numbers, and a data integrity tool is being used to clean up existing duplicates before the update. 24:11
 - *Benefit:* Reduces coupling errors and manual data cleanup.

Business Central Enhancements

- **Create Payment Button Support**
 - The "Create Payment" button in Business Central now creates supported payments that sync back to CRM, closing a gap where payments could be missed. 25:35
 - *Benefit:* Ensures all payments are tracked and synchronized, regardless of entry method.

GOfund Enhancements

- **Last Sign-In Date for GOfund Users**
 - A new field on contacts tracks the last sign-in date, visible in the donor portal connections view. 26:56
 - *Benefit:* Helps staff identify unregistered or inactive users for follow-up.
- **Gift & Grant History View Refinement**

- History views now exclude records with error or reversed status, improving data accuracy. 27:39

GOdonate Enhancements

- **Recurring Gift Error Handling**

- Errors are now more visible on recurring gift records and dashboard views. Automatic retries are discontinued; staff can manually retry or schedule retries. Donors receive an email on the first error. 30:20
- *Benefit:* Improves transparency and control over failed recurring gifts, reducing confusion and unnecessary retries.

- **Stripe Donor Identification**

- Currently, only email addresses are used to identify donors in Stripe for non-recurring gifts. Passing more information is on the development list. 31:35

Other Notable Topics

- **Duplicate Detection Rule for Tax ID**

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

- **Scholarship Review Group Opt-In**

- The "add to review group" button for scholarships checks the opt-in field on requested scholarship records. If not using these, no action is needed. 36:42

- **Mailing List Primary Contact Updates**

- Mailing lists are a snapshot in time; if the primary contact changes, associated lists must be updated manually. A suggestion exists to automate this in the future. 37:50

- **Application Submission Best Practices**

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

- **Scholarship Auto Match Timing**

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

Release Timing & Next Steps

- All discussed features and fixes will be live the morning of November 21. Users are reminded to clear their cache that day. Hotfixes and bug fixes will continue to roll out as needed, with announcements posted in GOsupport and the forum. 32:34