



TODAY'S SESSION

# Agenda

- 1 Housekeeping
- 2 akoyaGO Enhancements
- 3 GOapply — Fixes & Improvements
- 4 Performance Optimization
- 5 Fund Fee & Formula Builder
- 6 GOfund Enhancements
- 7 GOfund Enhancements
- 8 Business Central Enhancements

## RESOURCES

# Where to find release resources

Everything for this release lives on GOSupport. Bookmark the link below so you can refer back anytime.

**GO TO** <https://gosupport.powerappsportals.com>

1

### Release Notes

The full, detailed list of everything in this release.

2

### Updated Documentation

Help articles refreshed to reflect the new features.

3

### Session Recording

A recording of today's webinar to revisit or share.

We invite you to explore the **full comprehensive release notes** for a detailed overview of upcoming enhancements, new features, and system updates designed to support your work.

**Please note:** This document is **actively being finalized** and is **subject to updates** prior to the official release.

# 01 · Housekeeping

The logo for GOsupport, with "GO" in yellow and "support" in grey.

## GOsupport Beta

A new version of GOsupport is in beta testing. Stay tuned for updates — and reach out to your Account Management if you'd like early access.



## EMPOWERED 2026

Registration for this year's user conference is open now. We'd love to see you there — don't miss it.



## Keep an eye on “Announcements”

Use GOsupport Announcements to stay current on these items between product updates.

## 03 · akoyaGO Enhancements

### HEADLINE

#### Richer mergefield formatting in letter templates

Merge fields now support richer formatting and dynamic content — so you can produce polished letters with far less manual editing.

- Formatting for dates, numbers, and currency values
- Conditional content that adapts to each record
- Hyperlinks, formulas, and **embedded images**

### Also Resolved

- Last year's total giving now includes History payments
- Anonymous scheduled distributions now flag the request correctly
- “Send to Accounting” now works from GOdonate gift-payment subgrids

# 04 · GOapply — Fixes & Improvements

Several GOapply issues are resolved this release — for a smoother experience across applicants, reviewers, and staff.

- 1 Re-submitted applications now move out of “Processing” to “Submitted” as expected.
- 2 The reviewer UI now shows the same question-based names that staff see.
- 3 Applicants get a single submission confirmation when using Submit All — no more duplicate emails.
- 4 Resubmitting now rebuilds the submitted PDF and updates the record correctly.
- 5 .... And many more! Please see release notes for full list of 40+ GOapply Bugs that were fixed as part of this release

# 05 · Performance Optimization

Saving and processing Requests is now faster and more reliable. We moved heavier work to the background and streamlined how Requests are handled — with no change to the way you work.

## What's faster

- Creating a **Request** is quicker — five background workflows consolidated into one optimized process
- Fund spendable amounts and grantee flags refresh in the background right after you save
  - If you check right away after saving, you may briefly see the older **fund spendable amount** or **grantee flag** values until the background update finishes.
- Payment updates are batched
  - Instead of processing each payment **one at a time**, the system **batches** those updates in a faster way so the overall save experience is smoother.
- GOapply follow-up processing benefits from the same optimizations

## ⚠️ ADMIN HEADS-UP

The workflows below will be renamed with “xDeprecated” at the start in your PowerApps environment—unless they’ve been customized.

If any are not labeled as “xDeprecated [WORKFLOW NAME]”, make sure to deactivate them after the release. It’s also recommended to rename them to clearly indicate they are no longer part of akoyaGO functionality.

NEW FEATURE

## 06 · Fund Fee & Formula Builder

A new Fund Fee Formula Builder in akoyaGO — paired with Fund Fee Management enhancements in Business Central — gives you a flexible, reusable way to define how fund fees are calculated and posted.

### Define the formula

Create named, reusable fee formulas — or copy an existing one to start

Fixed-dollar or percentage fees

Fixed or tiered / stepped, stacked or non-stacked

Choose the balance type and averaging period

Set frequency, optional minimum fee, and rounding

Direct fee revenue and expense to the right accounts and revenue fund

### Process and Review

Assign one formula to many funds at once

Assess multiple fees at once with faster run times

Set frequency, optional minimum fee, and rounding

Available in akoyaGO and Business Central. Full configuration details are in the Release Notes.

June 2026 · Product Update

akoyaGO

# Configuration & recommendations

We'll demo these live — here's what's new in configuration and the recommendation experience.

## Customize & Relabel

Fund Summary section titles and helper text  
Rename the Recommendation Note field,  
Drafts page, and Submit Later button  
Distinct titles for external vs. interfund grant  
recs

## Smarter Forms

Optional Tax ID when adding a new  
organization  
More configurable Interfund Grant Rec fields  
Contact name optional when creating a new  
org

## Navigation & Discovery

Consistent top nav with a built-in fund picker  
and Drafts count  
New “Hero” tier for featured Funding  
Opportunities  
Pending interfund recommendations show  
on Fund Summary  
Helper text now sits under the title, above  
the input

## Donor experience, security & speed

...and improvements to the donor experience, security, and speed.

### Donor Experience

- Choose start and end dates for recurring gifts
- Auto-select the donor at checkout when only one exists; option to hide “Add New Donor”
- Show or hide the Dedication option when donating
- Customizable, branded donation checkout header
- Sort any Fund Summary box by column
- Cart submission confirmation screen with live status, plus a warning when drafts are still pending

### Security & Access

- Real-time password requirement checks with a show/hide toggle
- Clearer mobile menu icon on dark themes
- Fund Balance hidden for private foundations / non-accounting sites

### Performance

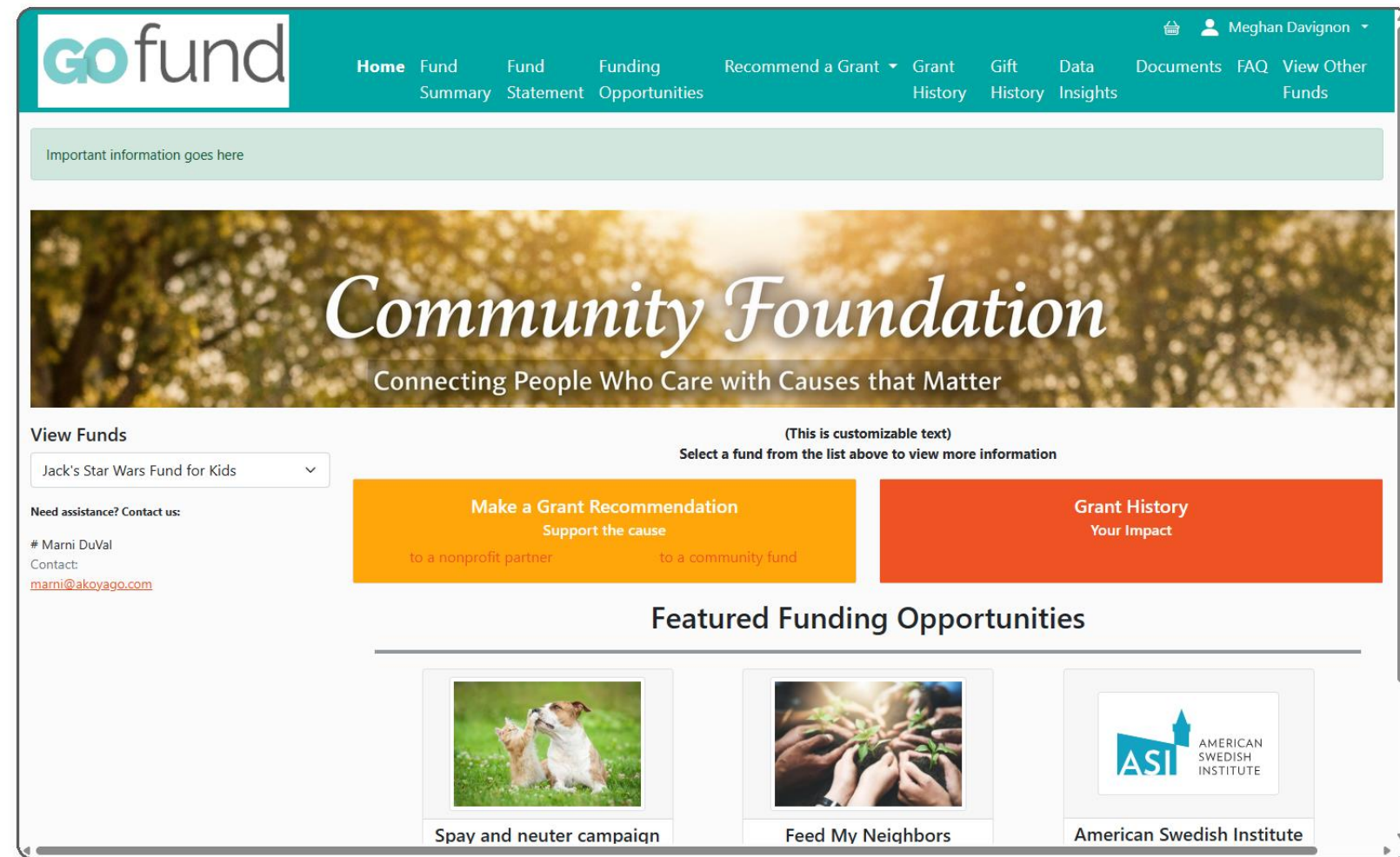
- Faster login, page loads, and grant-recommendation submissions.

## GOFUND PORTAL REDESIGN

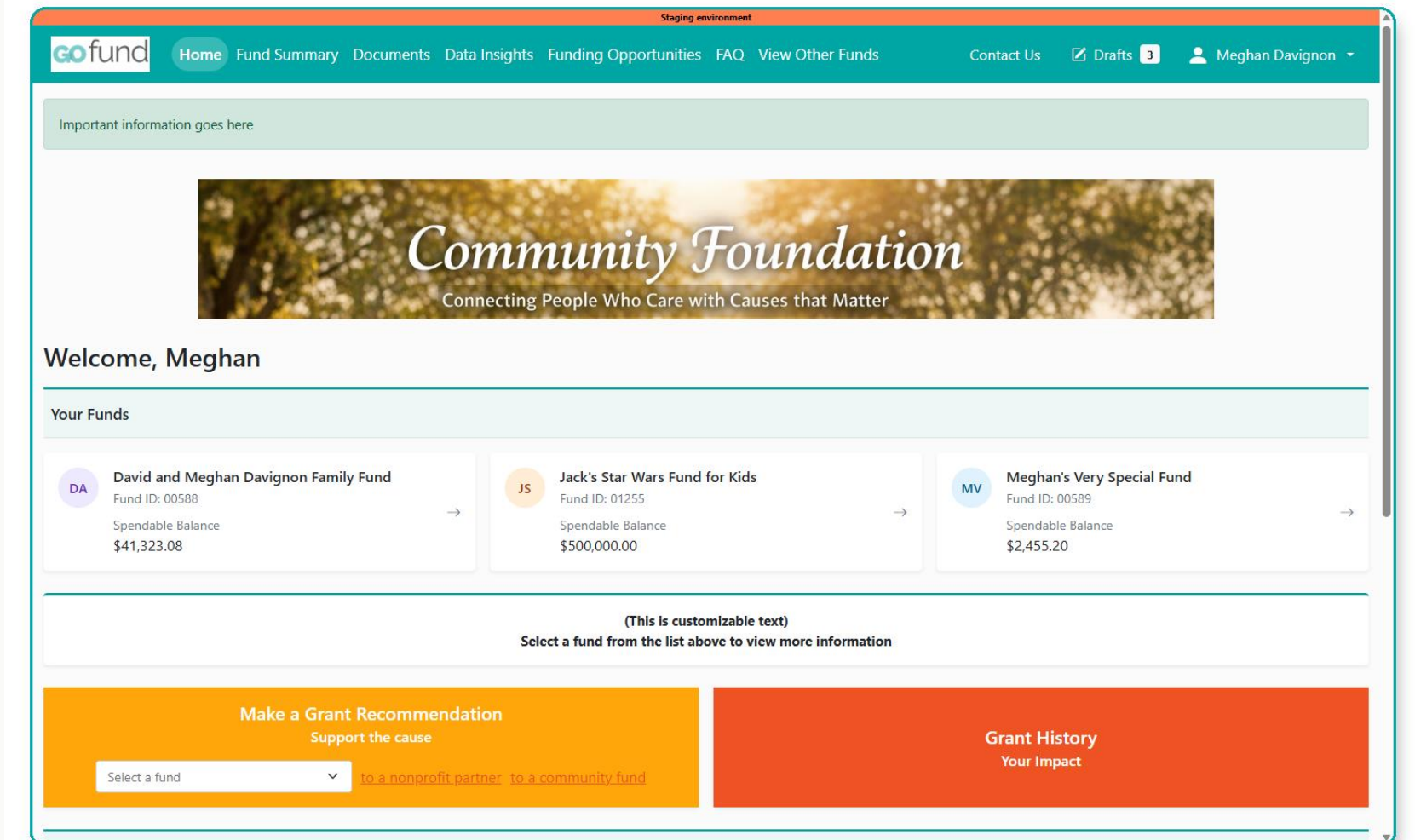
# Home Page

The left sidebar is replaced by a personalized welcome and an at-a-glance view of every fund as a card with its spendable balance — with Make a Grant Recommendation and Grant History given prominent placement.

### BEFORE



### AFTER



## GOFUND PORTAL REDESIGN

# Fund Summary

The dense single column is reorganized into clean, scannable cards — balances, contacts, and recent activity each get their own section, so fund holders find what they need faster.

### BEFORE

Important information goes here

Need assistance? Contact us:  
# akoyaGO Staging-Test Mail Acct  
Contact:  
[svc-d365-akoyagostaging-test-mailer@akoyago.onmicrosoft.com](mailto:svc-d365-akoyagostaging-test-mailer@akoyago.onmicrosoft.com)

**David and Meghan Davignon Family Fund** (00588)

Give to my Fund Recommend a Grant View Fund Statement

Primary Fund Contact: Meghan Davignon

Fund Balance	\$222,920.00
Spendable* Balance	\$41,323.08

\* This is the available amount to spend less any pending recommendations and payments in process.

Recent Grants Payments

Request Applicant	Amount	Payment Status	Purpose	Formal Fund Name	Decision Date	Payment Date	
ABC Community Services	(\$2,500.00)	Deposited		David and Meghan Davignon Family Fund	2/24/2025	6/30/2025	<a href="#">Repeat Grant</a>
Meghan March Regression Constituent	\$5,500.00	Paid		David and Meghan Davignon Family Fund	3/3/2025	4/17/2025	<a href="#">Repeat Grant</a>
Meghan March Regression Constituent	(\$5,000.00)	Deposited		David and Meghan Davignon Family Fund	3/3/2025	3/3/2025	<a href="#">Repeat Grant</a>

See Full Grant History

Recent Contributions

### AFTER

Staging environment

Home Fund Summary Documents Data Insights Funding Opportunities FAQ View Other Funds Contact Us Drafts 3 Meghan Davignon

CURRENTLY VIEWING: **David and Meghan Davignon Family Fund** (00588)

Give to my Fund Fund Statement Recommend a Grant Grant History Gift History

Important information goes here

FUND BALANCE	\$222,920.00
SPENDABLE BALANCE*	\$41,323.08
PRIMARY FUND CONTACT	<b>Meghan Davignon</b>

\* This is the available amount to spend less any pending recommendations and payments in process.

Pending Interfund Recommendations

INTERFUND NO	RECEIVING FUND NAME	GRANT RECOMMENDER	INTERFUND DATE	AMOUNT	GRANT PURPOSE
0001057	Belvin Family Fund, The	Meghan Davignon	6/12/2025	\$250.00	
0001081	Alon Johnson Fund	Meghan Davignon	10/9/2025	\$500.00	testing
0001082	Allie Benson Family Environment Fund	Meghan Davignon	6/18/2025	\$64,324.00	

Show all (2 more)

Recent Grant Payments

REQUEST APPLICANT	AMOUNT	PAYMENT STATUS	PURPOSE	FORMAL FUND NAME	DECISION DATE	PAYMENT DATE	
ABC Community Services	(\$2,500.00)	Deposited		David and Meghan Davignon Family Fund	2/24/2025	6/30/2025	Repeat grant
Meghan March Regression Constituent	\$5,500.00	Paid		David and Meghan Davignon Family Fund	3/3/2025	4/17/2025	Repeat grant
Meghan March Regression Constituent	(\$5,000.00)	Deposited		David and Meghan Davignon Family Fund	3/3/2025	3/3/2025	Repeat grant

View all →

## GOFUND PORTAL REDESIGN

# Fund Statement

Same underlying statement and data, now presented in a wider, more modern document frame — with lighter surrounding chrome so the statement itself gets more room.

### BEFORE

Important information goes here

David and Meghan Davignon Family Fund Fund Statement

Start Date: 01/01/2026 End Date: 06/11/2026 Apply Filter

This is the fund statement header text

Summary of Fund Activity	
David and Meghan Davignon Family Fund - # 00588	
Fund Statement: 1/1/2026 through 6/11/2026	
<b>Opening Fund Balance</b>	<b>197,753.36</b>
<b>Revenue</b>	
Contributions/ Gift	25,000.00
Investment Gains/Losses	0.00
Other Revenue	0.00
<b>Total Revenue</b>	<b>25,000.00</b>
<b>Expenses</b>	
Grants and Scholarships	(500.00)
Fund Administrative Fees	333.36
Other Expenses	0.00
<b>Total Expenses</b>	<b>(166.64)</b>
Total Change In Fund Balance	25,166.64

### AFTER

Staging environment

Home Fund Summary Documents Data Insights Funding Opportunities FAQ View Other Funds Contact Us Drafts 3 Meghan Davignon

CURRENTLY VIEWING: David and Meghan Davignon Family Fund Give to my Fund Fund Statement Recommend a Grant Grant History Gift History

Start Date: 01/01/2026 End Date: 06/11/2026 Apply Filter

This is the fund statement header text

Summary of Fund Activity	
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Contributions/ Gift	25,000.00
Investment Gains/Losses	0.00
Other Revenue	0.00
<b>Total Revenue</b>	<b>25,000.00</b>
<b>Expenses</b>	
Grants and Scholarships	(500.00)
Fund Administrative Fees	333.36
Other Expenses	0.00
<b>Total Expenses</b>	<b>(166.64)</b>
Total Change In Fund Balance	25,166.64
<b>Ending Fund Balance</b>	<b>222,920.00</b>
Available To Spend	125,797.08

## GOFUND PORTAL REDESIGN

# Grant History

The searchable record of all grant activity gets a cleaner filter and results layout — less clutter, better spacing, and styling consistent with the rest of the portal.

### BEFORE

Important information goes here

Need assistance? Contact us: Fund Name  
# Marni DuVal  
Contact: [marni@akoyago.com](mailto:marni@akoyago.com)

David and Meghan Davignon Family Fund Select funds...

Grant Recipient Start Date End Date  
Select an organization... 01/01/2025 06/11/2026

Reset Apply Filter

Grant History [Export to Excel](#)

Search table...

Request Applicant ↑	Amount ↑	Payment Status ↑	Purpose ↑	Formal Fund Name ↑	Decision Date ↑	Payment Date ↑	
ABC Community Services	(\$2,500.00)	Deposited		David and Meghan Davignon Family Fund	2/24/2025	6/30/2025	<a href="#">Repeat Grant</a>
Meghan March Regression Constituent	\$5,500.00	Paid		David and Meghan Davignon Family Fund	3/3/2025	4/17/2025	<a href="#">Repeat Grant</a>
Meghan March Regression Constituent	(\$5,000.00)	Deposited		David and Meghan Davignon Family Fund	3/3/2025	3/3/2025	<a href="#">Repeat Grant</a>
ABC Community Services	\$12,000.00	Paid		David and Meghan Davignon Family Fund	2/24/2025	2/25/2025	<a href="#">Repeat Grant</a>
ABC Community Services	(\$2,000.00)	Deposited		David and Meghan Davignon Family Fund	2/24/2025	2/25/2025	<a href="#">Repeat Grant</a>
ABC Community Services	\$5,000.00	Paid		David and Meghan Davignon Family Fund	2/24/2025	2/25/2025	<a href="#">Repeat Grant</a>

This is a test site  
© Powered by [akoyaGO](#) - 2026.5.12.2 - [Support Diagnostics](#)

### AFTER

Staging environment

gofund Home Fund Summary Documents Data Insights Funding Opportunities FAQ View Other Funds Contact Us Drafts 3 Meghan Davignon

CURRENTLY VIEWING  
David and Meghan Davignon Family Fund Give to my Fund Fund Statement Recommend a Grant Grant History Gift History

Important information goes here

Fund Name  
David and Meghan Davignon Family Fund Select funds...

Grant Recipient Start Date End Date  
Select an organization... 01/01/2025 06/11/2026

Reset Apply Filter

Grant History [Export to Excel](#)

Search...

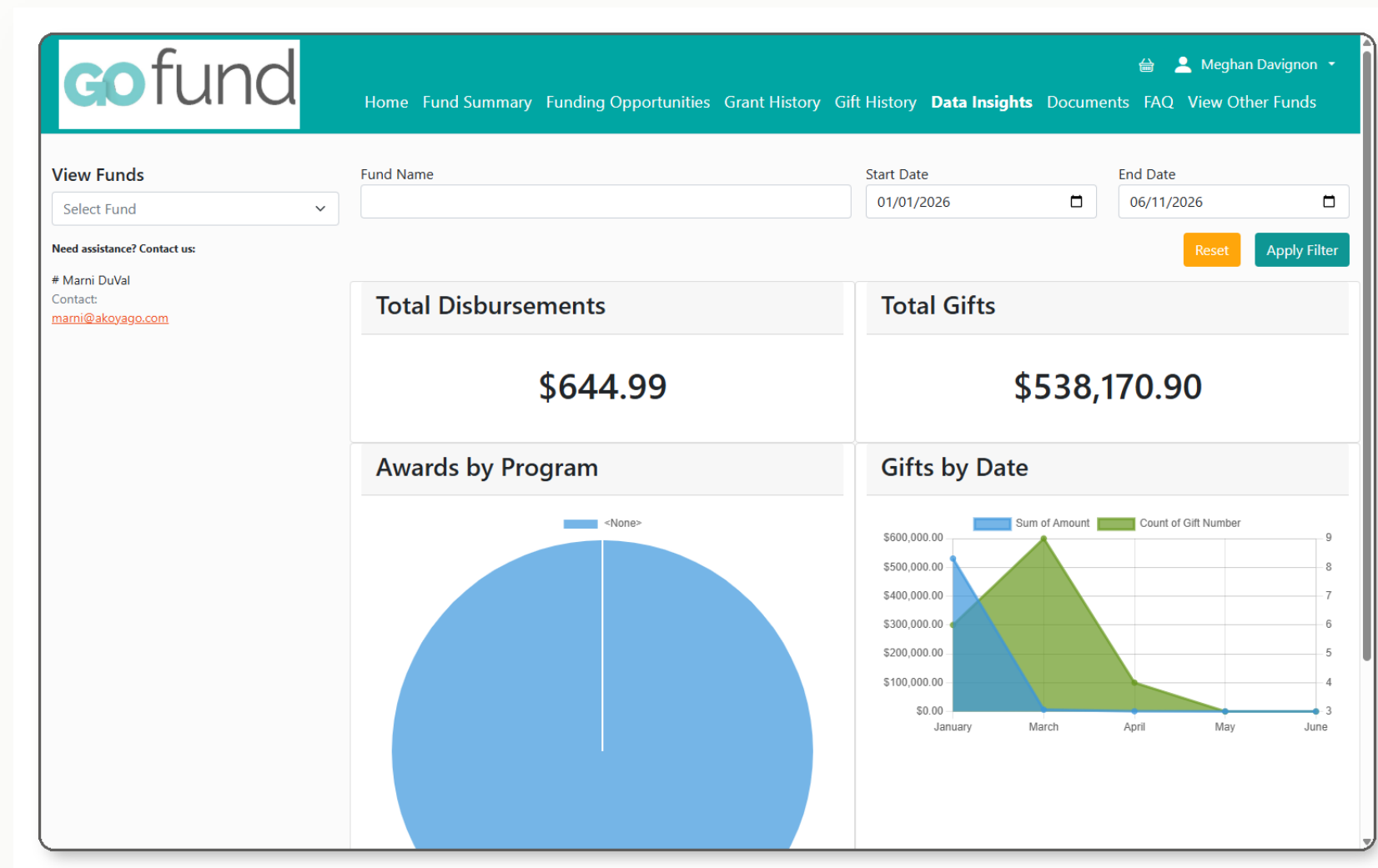
REQUEST APPLICANT ↓↑	AMOUNT ↓↑	PAYMENT STATUS ↓↑	PURPOSE ↓↑	FORMAL FUND NAME ↓↑	DECISION DATE ↓↑	PAYMENT DATE ↓↑	
ABC Community Services	(\$2,500.00)	Deposited		David and Meghan Davignon Family Fund	2/24/2025	6/30/2025	Repeat grant
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## GOFUND PORTAL REDESIGN

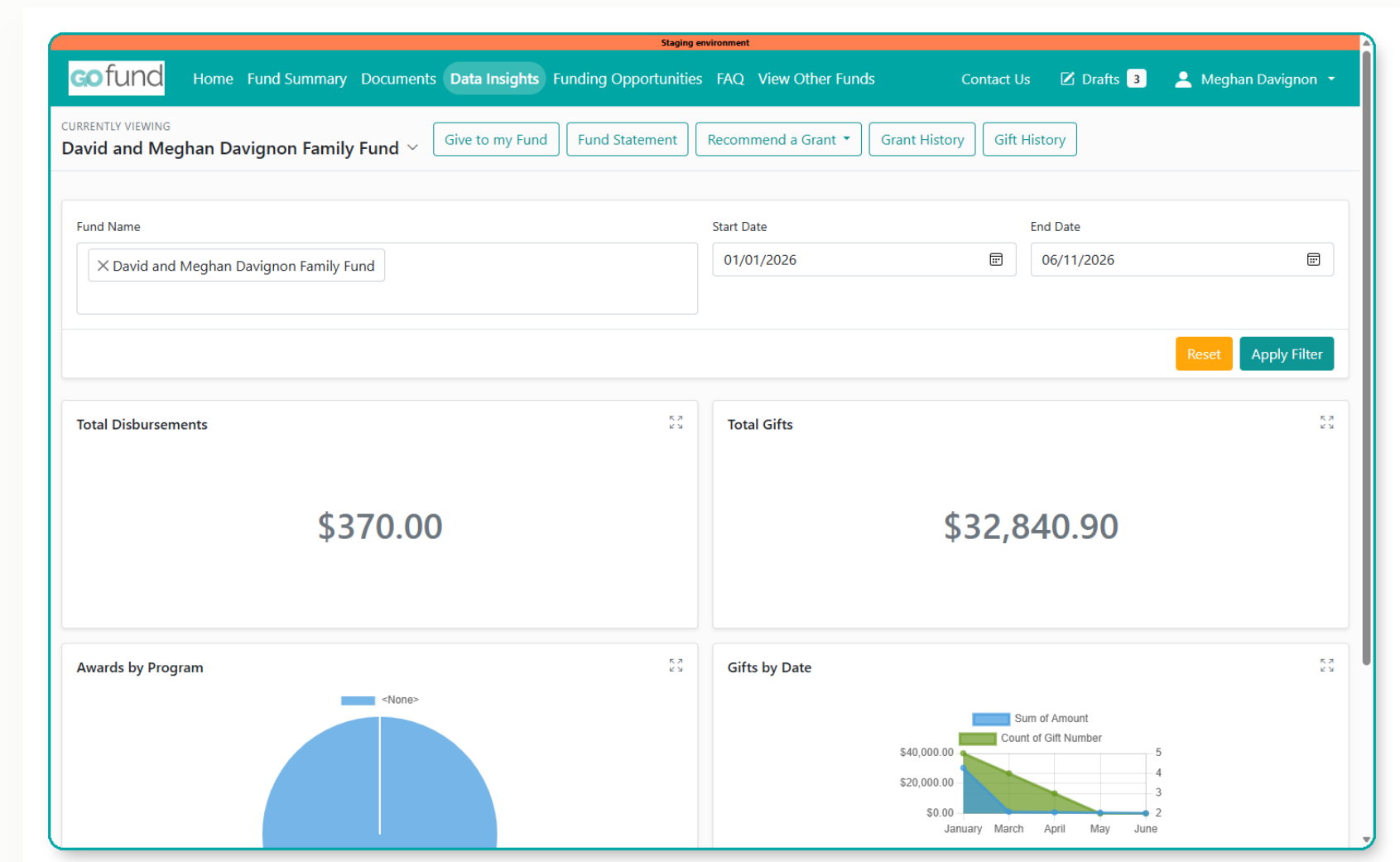
# Charts → Data Insights

The Charts page is now Data Insights. Dashboard cards are roomier and gain interactive controls so fund holders can drill into disbursements and gifts for a closer look.

### BEFORE



### AFTER

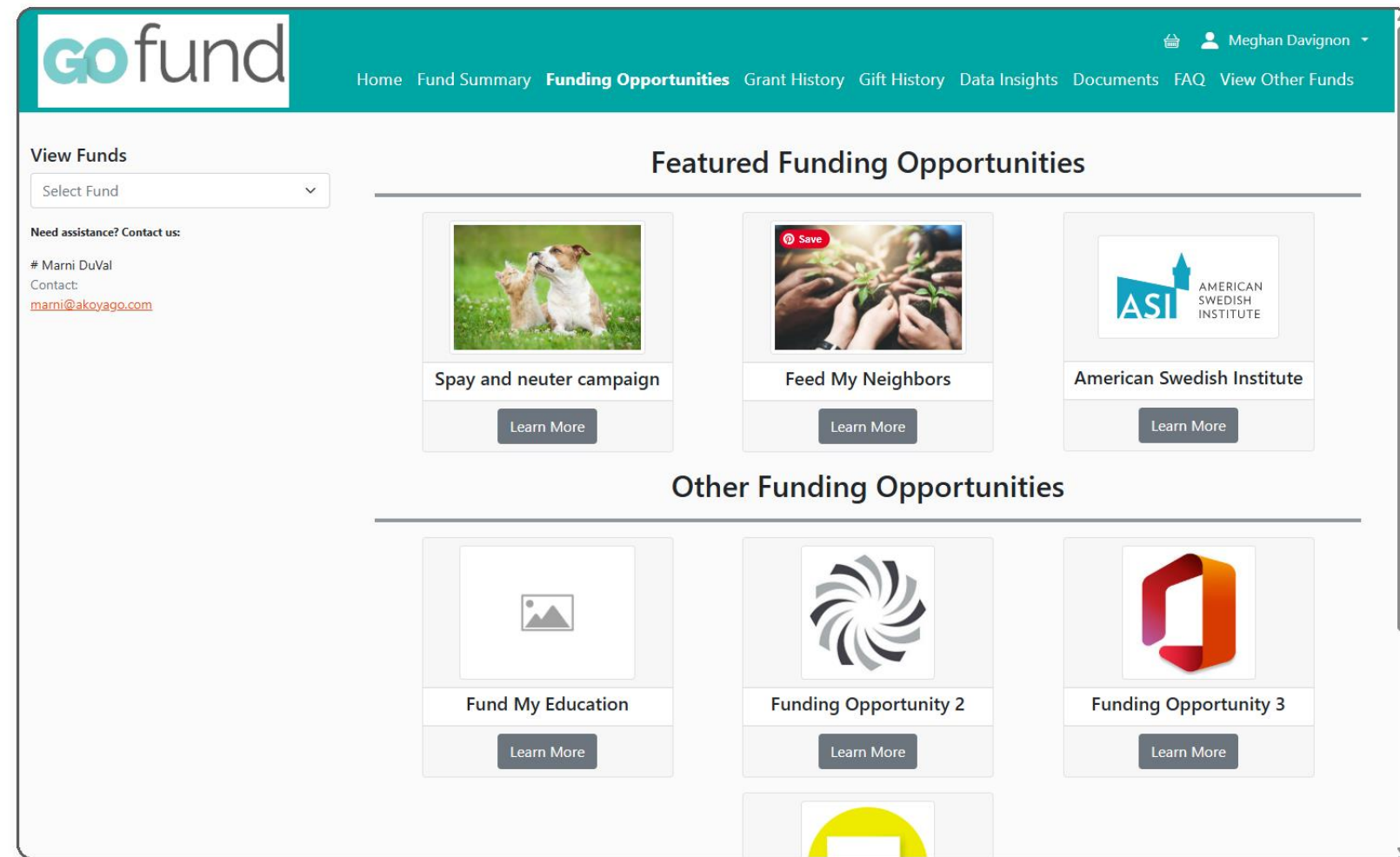


## GOFUND PORTAL REDESIGN

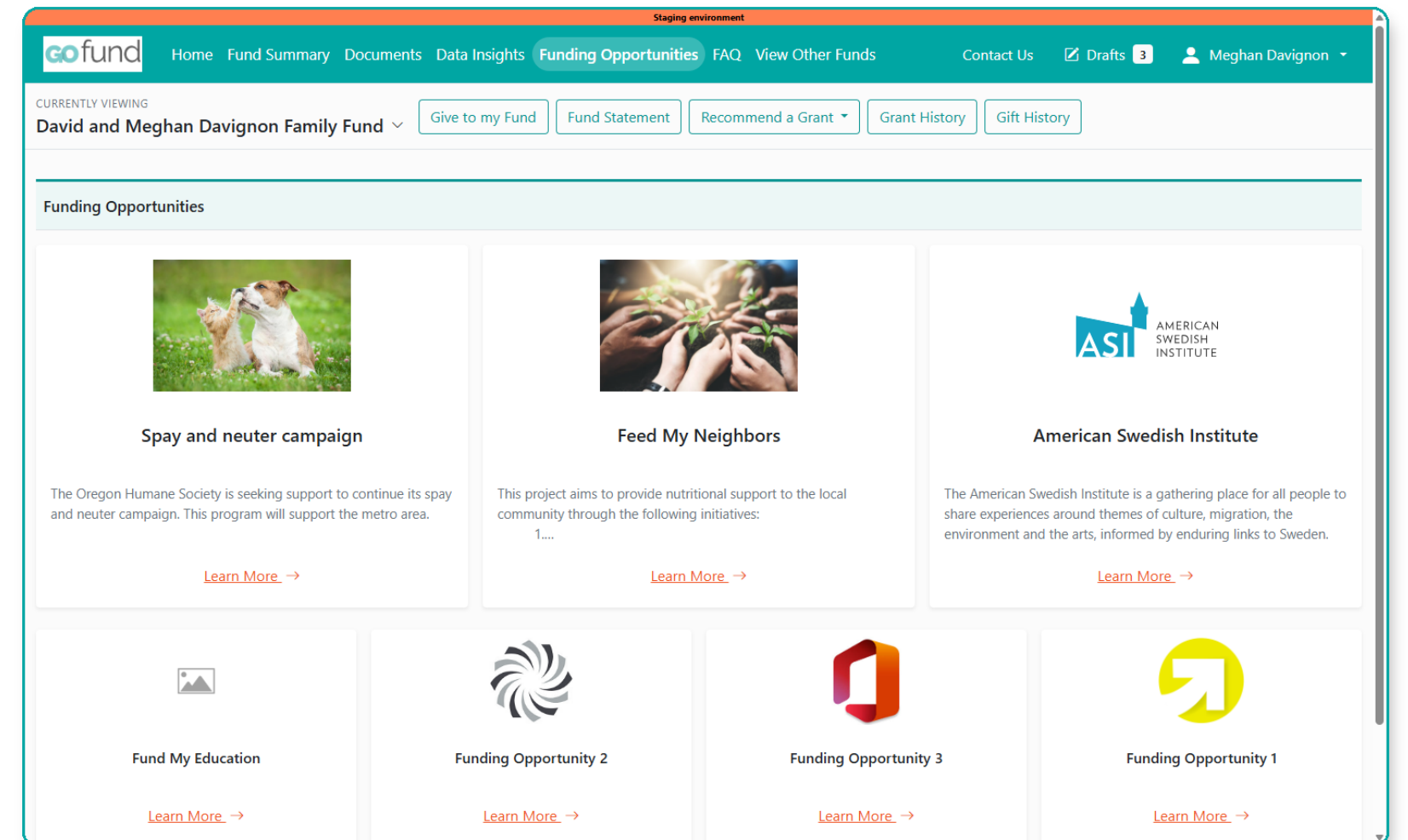
# Funding Opportunities

The catalog of causes a fund holder can support. Cards now do more of the storytelling — larger images and better descriptions in a layout that invites exploration.

### BEFORE



### AFTER

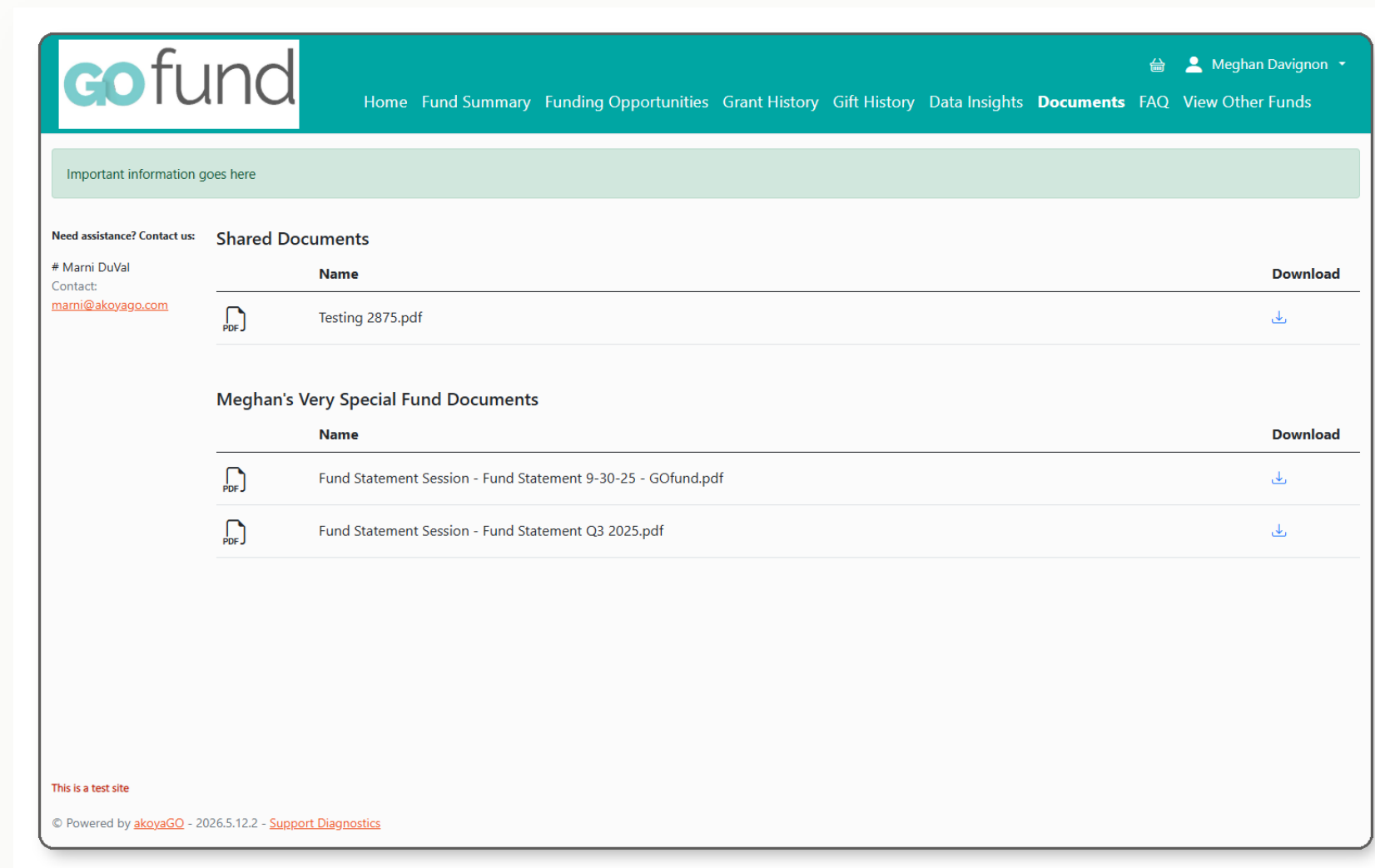


## GOFUND PORTAL REDESIGN

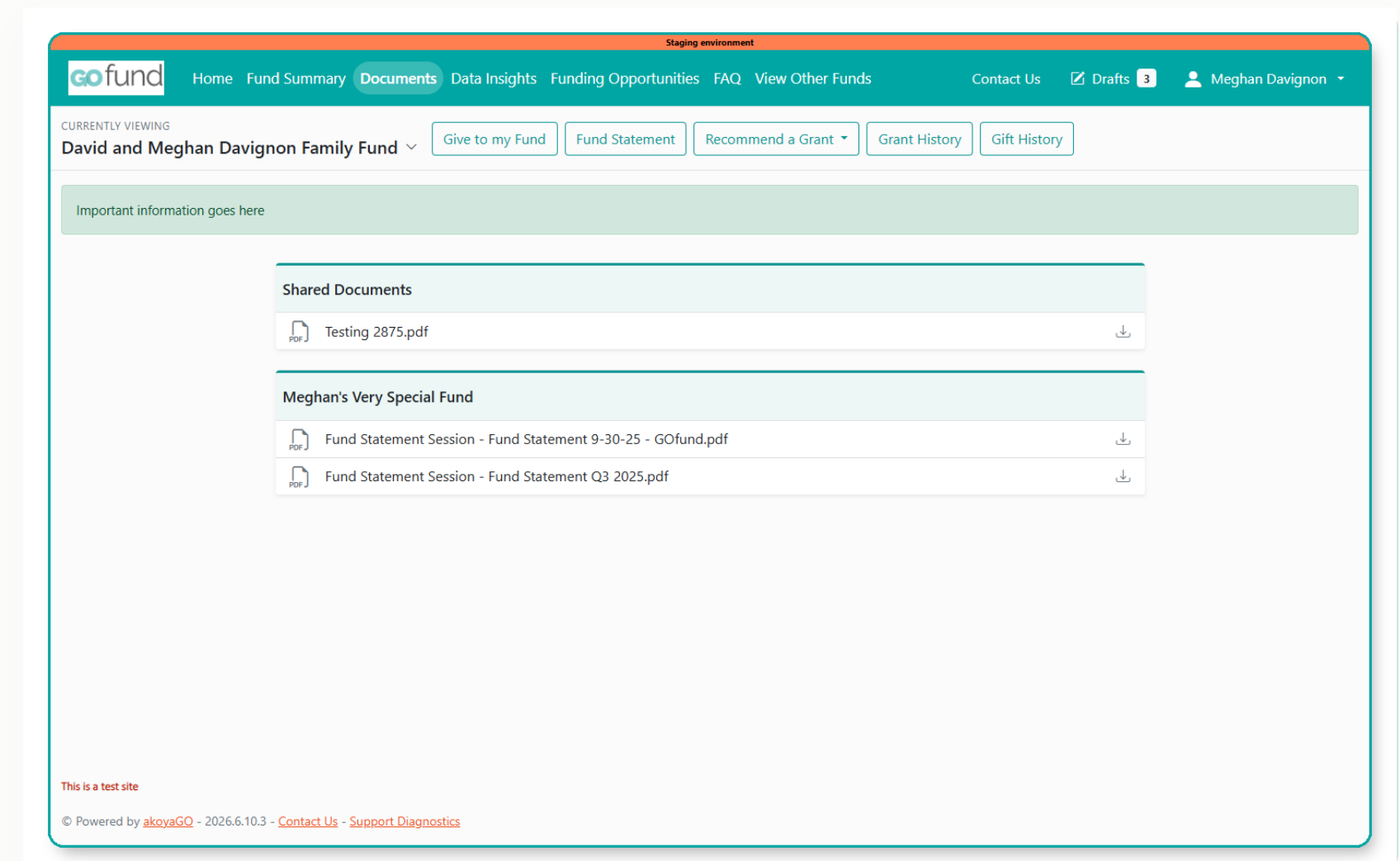
# Documents

Shared and fund-specific files available for download. Grouping is clearer and visually lighter — easier to scan, less crowded, and consistent with the rest of the new design.

### BEFORE



### AFTER



## 08 · GOdonate Enhancements

1

### Featured Funds, filtered

The Featured Fund fields now list only GOdonate-enabled funds, so it's easier to pick the right fund — and you avoid selecting a fund that wouldn't actually appear as featured in the donor portal.

2

### Custom Checkout Header

Display a formatted, branded message at the top of donation checkout, configured in GOdonate settings. It appears in both GOdonate and GOfund checkout, and defaults to “Donation Checkout” when not set.

# 09 · Business Central Enhancements

## **New akoyaGO Purchase Invoice System**

Posting now handles invoices that include different dimension sets by splitting them into matching sections, so Business Central posts each part correctly — helping with corrections, reporting, and some 1099 scenarios.

## **Bank Account Posting Group Validation**

A new Validation column flags setup issues in red with line-by-line detail, a Bank Count column lets you drill into the affected banks, and fact panels surface banks or asset G/L accounts missing a posting group.

Fund Fee Management in Business Central is covered under the Fund Fee & Formula Builder.

# Thank you!

**Don't forget to clear your cache next Friday morning to ensure you receive all the updates.**

Questions? Reach out anytime on [GOsupport](#).