

# June 2026 Product Update — Detailed Recap

**Source:** Webinar transcript, chat, and shared screens

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## 1. Overview & Framing

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What was covered

- Focus on **enhancements and functionality changes** (not bugs)
- Heavy emphasis on:
  - GoFund enhancements
  - Performance optimization
  - New Fund Fee Formula Builder

Key context

- Release notes are the **source of truth** and are still evolving pre-release
- New **GoSupport experience is in beta**

Why this matters

- Sets expectation: webinar = **highlight reel**, not exhaustive
  - Encourages clients to rely on **documentation + KAs** (important for your KA planning work)
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## 2. akoyaGO Core Enhancements

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### 2.1 Letter Template Enhancements

What changed

- Merge fields now support:
  - Hyperlinks
  - Formulas
  - Embedded images

Why this change was made

- Previously, templates required **manual formatting or external editing**

Benefit to users

- Produce **fully formatted letters directly in-system**
  - Reduce **manual post-processing**
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### 2.2 Data & Calculation Fixes

What changed

- “Last Year’s Total Giving” now includes **payments with status history**
- Anonymous scheduled distributions correctly update request flag
- “Send to Accounting” button now works from GoDonate subgrids

Why

- Fix gaps where system behavior didn’t match user expectations

## Benefit

- Improved **data accuracy + trust in reporting**
  - Eliminates confusion around inconsistent system behavior
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## ⚡ 3. GOapply Fixes & Improvements

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### Key fixes (partial list)

- Applications stuck in “Processing” now correctly move to “Submitted”
- Reviewer UI now uses **question-based file names** instead of GUIDs
- Duplicate submission emails resolved
- Resubmission tool correctly updates PDFs and request records

### Chat clarification

- Performance improvement applies to request creation but **GoFund submission optimization does NOT apply to GOapply submissions**

### Why

- Reduce friction for:
  - Applicants (duplicate emails, stuck submissions)
  - Reviewers (unreadable file names)

## Benefit

- Smoother end-to-end application flow
  - Less support overhead
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## ⚡ 4. Major Performance Optimization (Cross-System)

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### What changed

- 5+ legacy workflows consolidated into **one shared plugin (code-based)**
- Payment updates now **batch processed** instead of one-by-one

### Deprecated workflows

- Existing workflows are marked:
  - xDeprecated [Workflow Name]

### From chat (critical detail)

- All workflow functionality has been **fully transferred to code**
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### 🔧 Required admin actions (step-by-step)

1. Go to **Power Apps → Workflows**
  2. Locate workflows with:
    - xDeprecated prefix OR matching release list
  3. If NOT labeled:
    - Manually **deactivate them**
  4. Rename workflows to indicate deprecation
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## Why this change was made

- Too many background workflows caused:
  - Slower request creation
  - Performance overhead

## Benefit

- Faster:
    - Request creation (GOapply, GoFund, manual)
  - More reliable processing
  - Reduced technical complexity
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## 5. GoFund Enhancements (Major Section)

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This is the **largest change area**.

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### 5.1 UI Overhaul

#### What changed

- Removed left sidebar
- Introduced:
  - Cleaner layout
  - Mobile-friendly design

#### Why

- Sidebar caused:
  - Navigation confusion
  - Mobile usability issues

#### Benefit

- More intuitive experience
  - Modern UX
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### 5.2 Navigation & Fund Selection

#### What changed

- Static navigation across pages
- Consistent fund selection dropdown

#### Why

- Previously, buttons appeared/disappeared based on permissions

#### Benefit

- Predictable navigation
  - Less confusion for fundholders
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### 5.3 Increased Configuration & Customization

#### New capabilities

Admins can now:

- Rename labels across UI
  - Add helper text
  - Customize section headers
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## ✂ Step-by-step: Customize labels/helper text

1. Go to **GoFund Settings**
  2. Select relevant section (e.g., Grant Recommendations)
  3. Update:
    - Field labels
    - Helper text
    - Section headers
  4. Save changes
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### Why

- Clients needed more flexibility without dev work

### Benefit

- Tailored language for:
    - Foundations
    - Donors
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## 5.4 Grant Recommendation Enhancements

### What changed

- Field labels + helper text customizable
  - “Submit Later” button label customizable
  - Drafts (cart) renamed + configurable
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### New safeguard

- Warning if submitting while drafts still exist

### Why

- Prevent accidental submission mistakes

### Benefit

- Better user control + fewer errors
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## 5.5 Background Processing for Submissions

### What changed

- Submissions now:
    - Validate instantly
    - Process in background job
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## ✂ Step-by-step: What user experience looks like now

1. User submits grant
2. System:
  - Validates data immediately
  - Converts to background job

3. Status = “Processing”
  4. User can leave page
  5. Completion:
    - Confirmation email sent
    - Submission clears from cart
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#### Why

- Previous experience:
  - Long waits
  - Users thought system was broken
  - Risk of abandonment errors

#### Benefit

- Faster perceived performance
  - Reduced submission failures
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#### Admin Action Required

- Review **success message text** in GoFund Settings
  - Update wording to reflect “processing” vs “completed”
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## 5.6 New Features in Fund Summary

#### What changed

- Sorting on all columns
- Expandable lists
- Pending interfund recommendations now visible

#### Benefit

- Better visibility into fund activity
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## 5.7 Donation / Checkout Enhancements

#### What changed

- Custom checkout header
- Option to:
  - Hide “Add new donor”
  - Default donor selection

#### Benefit

- Streamlined donation flow
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## 6. Fund Fee Formula Builder (Major Feature)

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#### What changed

- New **visual formula builder** replaces SQL-based formulas
  - One formula per calculation (vs one complex master formula)
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## ✂ Step-by-step: Create a new formula

1. Go to: **CRM** → **Tools** → **Fund Fee Formulas**
  2. Click **New**
  3. Switch to **Fee Formula Builder**
  4. Define:
    - Frequency (monthly, quarterly, etc.)
    - Calculation type (fixed, %, stepped)
    - Balance type (e.g., average daily)
  5. Set:
    - Averaging period
    - Account filters
    - Revenue/expense accounts
  6. (If tiered):
    - Add fee tiers
  7. Save
  8. Assign to funds (batch assign supported)
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## Additional capabilities

- Batch assign formulas to funds
  - Run multiple formulas at once in Business Central
  - Full transparency into:
    - Fee calculations
    - Supporting balance logic
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## Why this was built

- Old system:
    - Required SQL knowledge
    - Difficult to maintain
    - No transparency
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## Benefit

- Business users can manage fees without dev help
  - Faster execution + better troubleshooting
  - Improved auditability
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## Important notes

- Legacy formulas still **fully supported**
  - Some complex formulas may not yet be compatible
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## 7. Business Central Enhancement (Invoices)

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### What changed

- Invoices with multiple dimension sets are now:
  - Explicitly split into separate invoices
  - Visible to users

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## Why

- Previous behavior:
    - “Hidden” shadow invoices
    - Confused users
    - Broke cancel/correct functions
    - Caused 1099 issues
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## Benefit

- Transparent accounting behavior
  - Correct/cancel now works as expected
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## 8. Key Chat Clarifications (High Value)

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- Deprecated workflows → **Fully replaced by code**
  - Custom views → **Will not be overwritten**
  - Legacy fee formulas → **Remain functional**
  - GoFund changes apply to **all clients (including Private Foundations)**
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## 9. Final Takeaways (Executive-Level)

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### Biggest themes

1. **Performance**
    - Workflow → code
    - Background processing
  2. **Configurability**
    - GoFund labels, fields, UI control
  3. **Modernization**
    - GoFund UI overhaul
    - Formula builder replacing SQL
  4. **Transparency**
    - Fee calculations
    - Invoice splitting
    - Background jobs surfaced to users
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