

akoyaGO User Guide

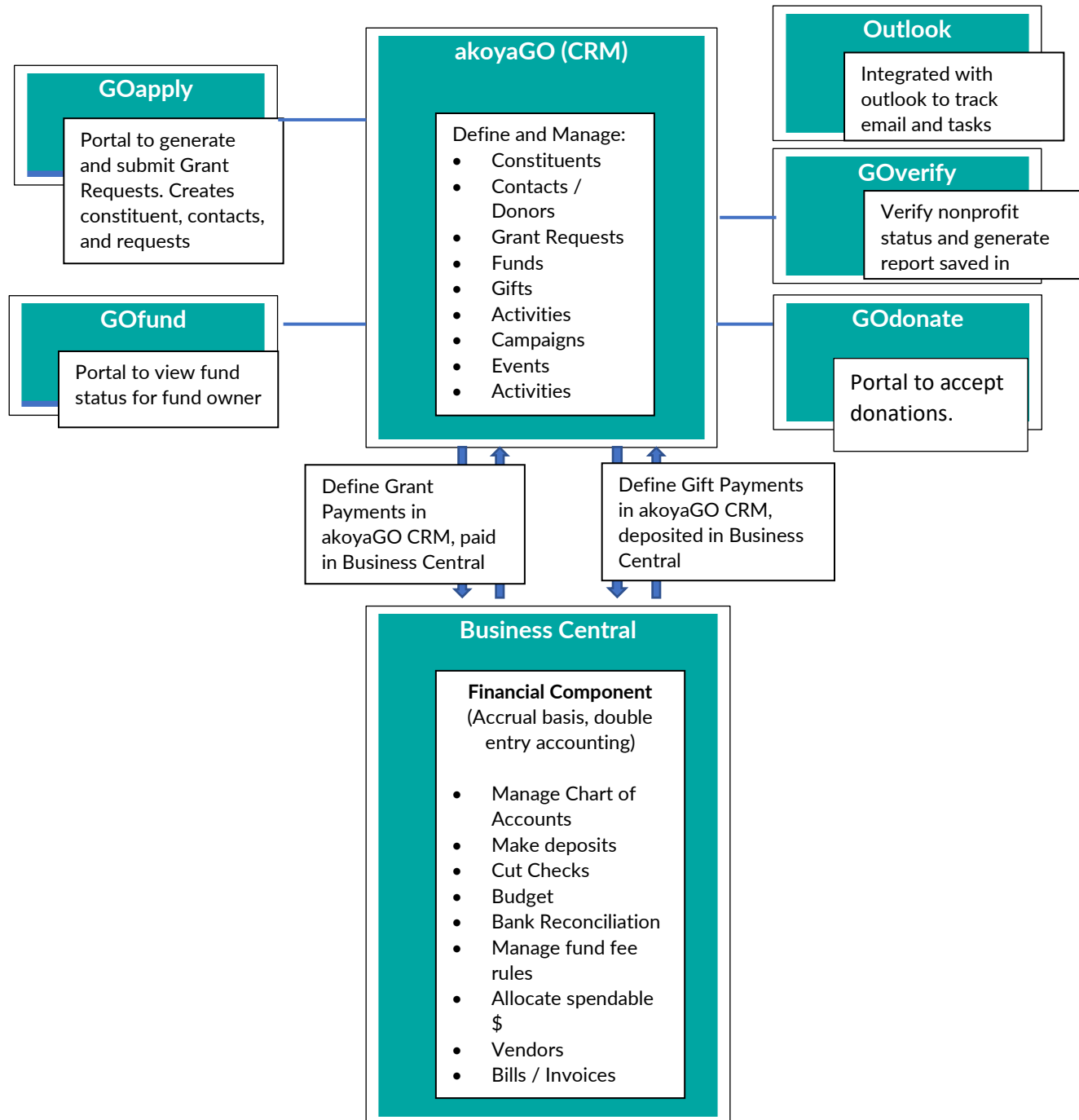
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Components

The major components of akoyaGO are the following



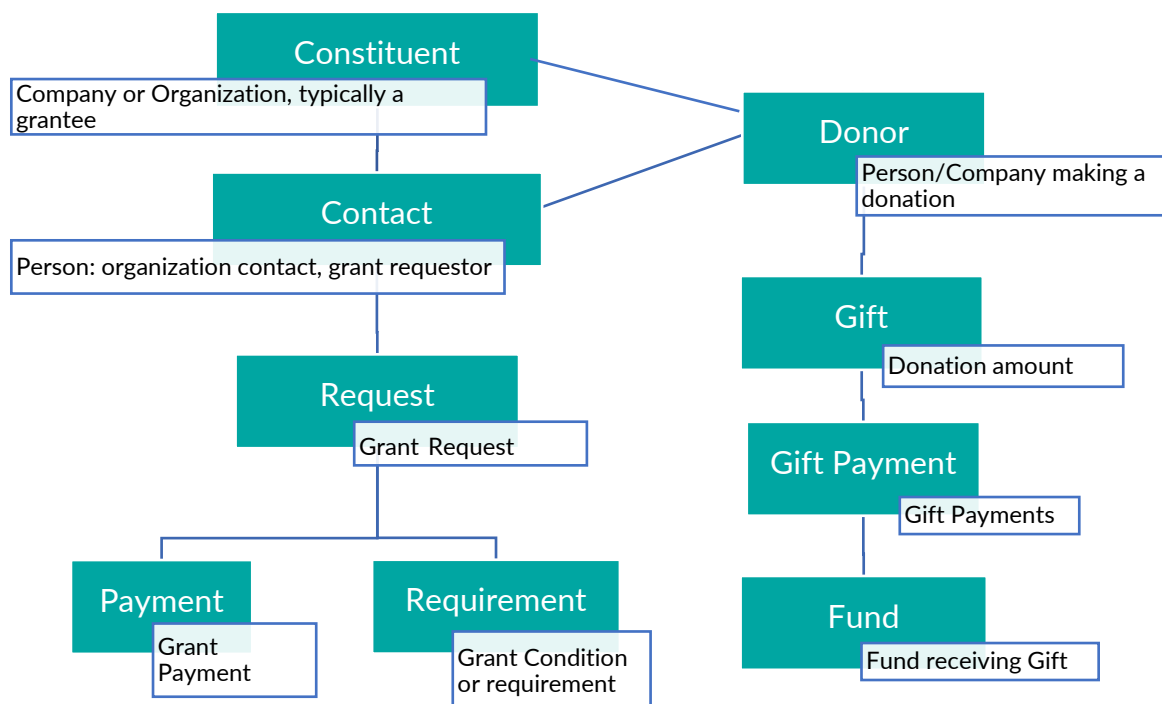
Overview

akoyaGO has 4 major components. Each component is considered a **workplace** in akoyaGO.

- **CRM:** Contact and constituent relationship management is integral with akoyaGO. Having everything linked provides the ability to understand your data and helps you develop strategies for fundraising and managing grants.
- **Grants Management:** Grants management covers grant requests and scholarships. Key features in this workplace includes programs, concepts, proposals, funding opportunities as well as tracking outcomes to better determine the success of your grant programs.
- **Donor Management:** Donor management covers fundraising and gifts. Key features include managing your donor gifts as well as developing prospects and donor opportunities. To aide in this process there are interest areas, campaigns, and event management.
- **Fund Management:** Fund management covers your funds, accounts, and interfund transactions. All accounting related features are part of this component.

Entities

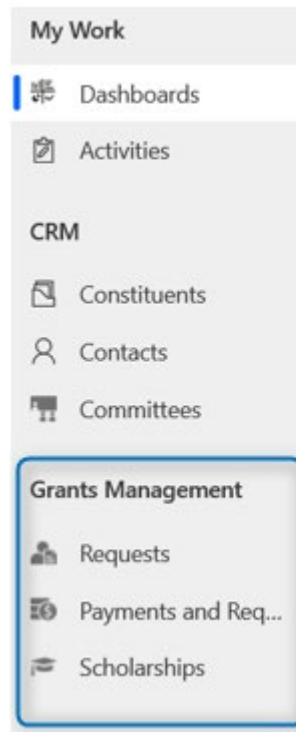
Data components in akoyaGO are referred to as entities. The major entities and their relationships are shown below.



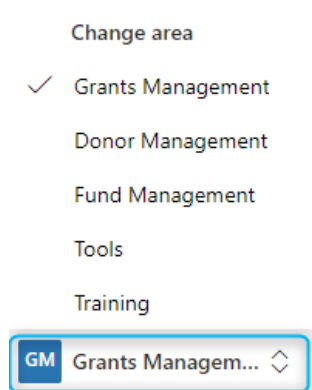
Navigation

To make navigation between components easier, the navigation bar to the left of your screen allows you to navigate to different workplaces and entities. The navigation bar has constant links at the top and workplace.

The top of the navigation bar remains consistent, the area highlighted in blue is considered a workplace. It groups entities related to the workplace. The example below shows the Grants Management workplace and lists entities such as requests, payments, and scholarships.



To change your workplace, click on the workplace name at the bottom of the navigation bar. It will display all workplaces. Select the workplace you want to use and the workplace will change and display entities related to that workplace.



Views

A View is a filtered list of information containing information about any Entity in akoyaGO. A view consists of the following elements:

- The columns to display
- Default sorting options
- Filters to show rows that match specific criteria, if needed

Views are one of the most customizable benefits within the akoyaGO software. For this reason, the following

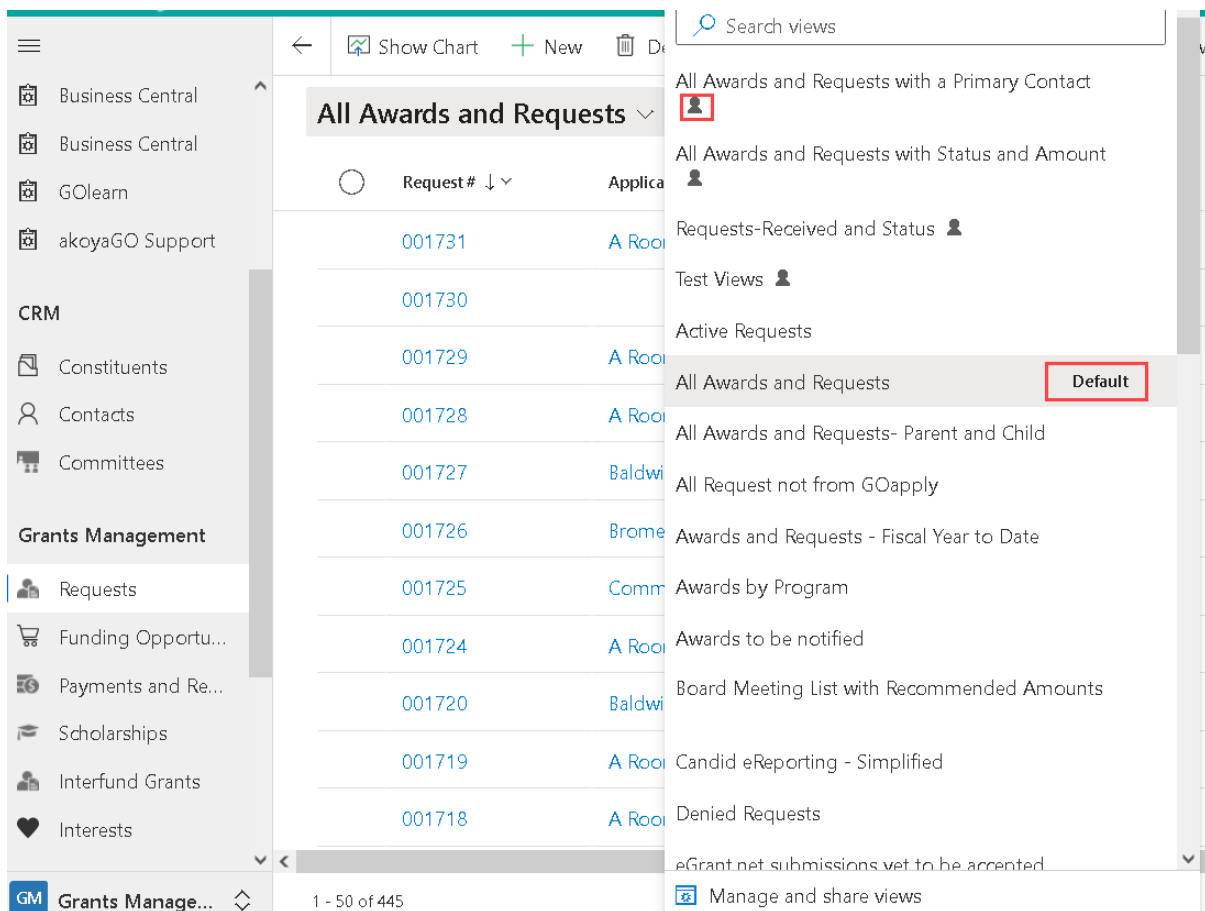
section of the guide is quite extensive.

There are two types of views: System and Personal (**My Views**).

System Views are standard and available to all akoyaGO users. They are provided “out of the box” and a part of your software solution and are found in any of the View dropdowns. The word **Default** will appear to the right of the View which is selected as the main view.

Personal Views are something you create. You will find an icon of a person next to Personal Views. Once you’ve created a Personal View, you can set it as a **Default**.

System views are views that are created by your administrator and shared with you. You typically can't modify them. However, you can create and manage personal views. Personal views are available to you only unless you share them.



The screenshot shows the akoyaGO interface with a sidebar on the left containing navigation links like 'Business Central', 'GOlearn', 'akoyaGO Support', 'CRM', 'Constituents', 'Contacts', 'Committees', 'Grants Management', 'Requests', 'Funding Opportu...', 'Payments and Re...', 'Scholarships', 'Interfund Grants', and 'Interests'. The main content area displays a table titled 'All Awards and Requests' with columns for 'Request #' and 'Applica'. A dropdown menu is open on the right, showing a list of views. The 'All Awards and Requests' view is highlighted with a red box and labeled 'Default'. Other views in the list include 'All Awards and Requests with a Primary Contact', 'All Awards and Requests with Status and Amount', 'Requests-Received and Status', 'Test Views', 'Active Requests', 'All Awards and Requests- Parent and Child', 'All Request not from GOapply', 'Awards and Requests - Fiscal Year to Date', 'Awards by Program', 'Awards to be notified', 'Board Meeting List with Recommended Amounts', 'Candid eReporting - Simplified', 'Denied Requests', and 'eGrant.net submissions vet to be accepted'. A search bar at the top of the dropdown menu is labeled 'Search views'.

By hovering your mouse to the right of any View, you will see an information icon (Blue circle with an 'i' in it). This information icon will tell you if it's a System View or a Personal View. If it's a Personal View, it will show you the owner.

Finished Awards

GOfund Grants

Grant Awards and Requests

Grants Awarded by Budget Item

Inactive Requests

Ineligible Requests

All Awards and Requests with a Primary Contact

All Awards and Requests with Status and Amount

Requests-Received and Status

Test Views

Active Requests

System view

Personal view. This view contains requests received and their status. Owned by Tim Schram.

Request S...	Begin Date	Program
Approved		Commun...

ENHANCED FILTERING

Under the Tool Bar in any View, you will see Edit Columns and Edit Filters. These are considered Enhanced Filtering tools.

- **Edit Columns** allows you to add or delete columns in a View.
- **Edit Filters** allows you to add or remove criteria so you can sort rows of information in a View.

← Show Chart + New Delete Refresh Email a Link Flow Run Report Excel Templates Export to Excel

All Awards and Requests

Edit columns Edit filters Search this view

Request #	Applicant	Title	Request S...	Begin Date	Program	Primary Contact	Decision ...	Fi
001571	Red Bird International	Red Bird International 2021 grant	Pending		Animal ...	Chelsea Cardinal	12/10/20...	
001570	The Kneu Co.	2022 The Kneu grant	Denied		Backpack...	Becky Bradley	1/20/2022	
001569	The Kneu Co.	2021 Grant - Kneu Co.	Approved		Youth & ...	Mimi Marshall	12/10/20...	
001568	The Olde Co.	2021 Grant Award - Olde Co,	Approved		Arts & C...	Patrick Bloom	12/10/20...	

EDITING COLUMNS

When **Edit Columns** is selected, a list of columns appears. Select **Edit columns** to remove, reorder, or add columns to get a clearer view of your data. You can 'drag and drop' the column headings in any order. You can also delete out columns.

The following actions are available in the column editor:

- To remove a column, hover over the column name, select ..., and then select Remove.
- To change the order of the columns, select ..., and then select Move up or Move down. Or, drag the column to the desired position in the list.
- In the second example below, columns were rearranged, and some were deleted. When you are finished editing, select the **Apply** button.

Edit columns: Requests

+ Add columns ↶ Reset to default

Abc	Request #
Abc	Applicant
Abc	Title
Abc	Request Status
Abc	Begin Date
Abc	Program
Abc	Primary Contact
Abc	Decision Date
Abc	Finished
Abc	Grant Amount
Abc	Purpose

Edit columns: Requests

+ Add columns ↶ Reset to default

Abc	Applicant	...
Abc	Title	
Abc	Grant Amount	
Abc	Request Status	
Abc	Program	
Abc	Primary Contact	
Abc	Decision Date	
Abc	Request #	

Apply

Cancel

You can also click on the **Add Columns** to show a list of additional columns to add. You can select the **Related** tab to find additional columns related to where you started working with your View. There is also a **Reset to Default** button so you can return your View to the original criteria.

- To add columns to the view, select Add columns, and then do one or more of the following:
 - Select a column from the default set of system columns in the table.
 - Select Default, then select All or Custom, and then select from the set of columns in the table.
 - Type a column name in the Search box to find a specific column, and then select it.

Edit columns: Requests

+ Add columns ↶ Reset to default

Add columns

Request Related

Search

All

- 123 ACT
- Abc def Activities
- ? Age
- Abc Application ID
- Application Link Sent
- Balance
- Balance (Base)
- ✓ Balanced
- Begin Date
- Budget FY

- To add columns from other tables, select the **Related** tab. Expand the table that contains the column you want to add, and then select the column. When you're done adding columns, select **Close**.
- To undo changes to the view's columns at any time, select **Reset to default**.

EDITING FILTERING

Use the filter editor to view or change the query that underlies the data in the current view.

EDIT OR DELETE A CONDITION

- To change a condition, select the column, operator, or value and edit as needed.
- To remove a condition, select More commands (...) next to the row, and then select **Delete**.

Edit filters: Payments and Requirements

Reset to default

AND

<input type="checkbox"/>	Amount	Is Greater than	0	...
<input type="checkbox"/>	Payment Status / Folio	Contains data	<div> Delete Make group </div>	

+ Add

Apply

Cancel

ADD CONDITIONS

- To add one or more conditions, select **Add**.
- When you're finished editing the view filters, select **Apply** to see your changes on the grid page.

The following options are available when you add conditions in the filter editor:

The screenshot shows the filter editor interface. At the top, there is a dropdown menu labeled 'AND'. Below it, there are two conditions: 'Amount' is greater than '0' and 'Payment Status / Folio' contains data. A red box highlights the '+ Add' button, which has opened a dropdown menu with the following options: 'Add row', 'Add group', and 'Add related entity'.

- To add a condition, select **Add Row**, and then select the criteria for your View.

The screenshot shows the filter editor interface. At the top, there is a dropdown menu labeled 'AND'. Below it, there are three conditions: 'Amount' is greater than '0', 'Payment Status / Folio' contains data, and 'Account' begins with 'A'. A red box highlights the newly added condition 'Account' begins with 'A'.

- To add a group of conditions, select **Add group**. You can create multiple sub conditions and group them using **AND** & **OR** operators to create an expression.

The screenshot shows the 'Manage Dynamic List Members' dialog. At the top, there is a search bar labeled 'Look for:' with the text 'Contact' entered. To the right of the search bar is a dropdown menu labeled 'Use Saved View:' with the text '---'. Below the search bar, there is a filter editor interface. At the top, there is a dropdown menu labeled 'And'. Below it, there are two conditions: 'Email Address' contains data and a group of conditions. A red box highlights the 'Or' dropdown menu within the group. Below the 'Or' dropdown, there are two conditions: 'Address 1: State/Provi...' equals 'MN' and 'Address 1: State/Provi...' equals 'CO'. A red box highlights these two conditions. At the bottom of the group, there is a '+ Add' button. At the bottom of the filter editor, there is a '+ Add' button.

Find

- To add a single condition to a group, select the condition checkbox, then select ..., and then select **Make group**.
- To separate a group of conditions, select the group's checkbox, then select ..., and then select **Ungroup**.

- To add a condition based on a column in a related table, select **Add related entity**, and then select a table. **Contains Data** is the only condition that can be used with a related table in a view filter. Then, select the parameters for that related entity.

Edit filters: Events

[Reset to default](#)

Edit filters: Events

[Reset to default](#)

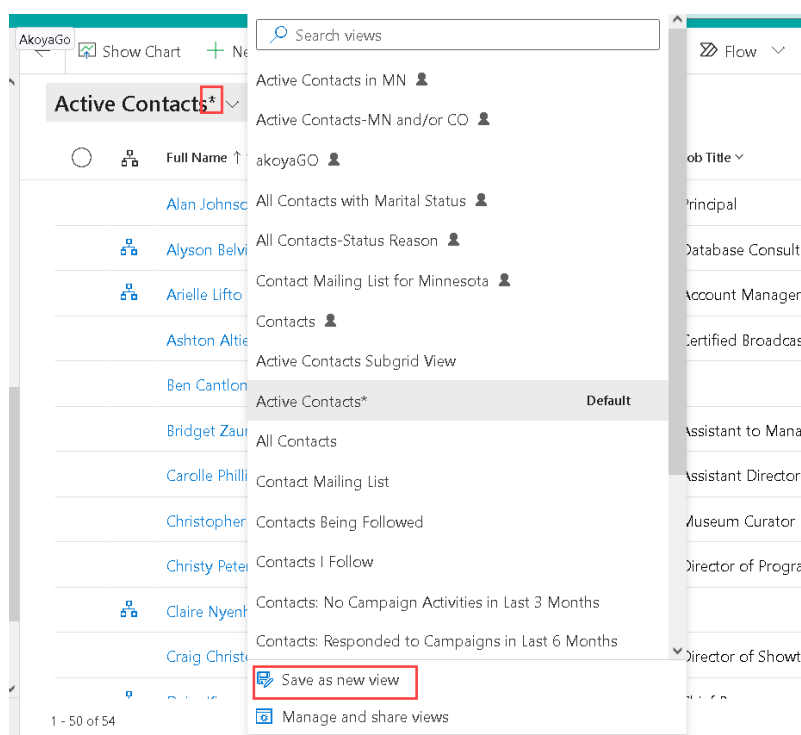
To undo changes to the view filter at any time, select **Reset to default** in the upper left-hand corner.

PERSONAL VIEWS

Once you've adjusted your columns and filtered rows, you need to save your View. After hitting the **Apply** button, you will be returned to the View on which you started. An asterisk (*) beside the view name indicates you edited the view and haven't saved it. If you switch to another view or leave the page, the view will revert to its original definition. To keep your changes and add the new view to the list of views available to you, be sure to save it.

SAVING YOUR EDITS AS A NEW VIEW

Once you've adjusted your columns and filtered rows, you need to save your View. After hitting the **Apply** button, you will be returned to the View on which you started. An asterisk (*) beside the view name indicates you edited the view and haven't saved it. If you switch to another view or leave the page, the view will revert to its original definition. To keep your changes and add the new view to the list of views available to you, be sure to save it.



To keep the original view, save your edited version as a new view with a different name. If you made changes to a view you don't have **Write** permission to, whether it's a system view or a personal view, then you can only **Save As New View**.

The next window will prompt you to enter a new **Name** and **Description** before you click on **Save**.

Note: If you want to keep the original view, be sure to give your edited view a different name. If you don't, your changes will *overwrite the existing view without confirmation*, even though you selected to save it as a new view.

Save as new view



The view is stored in the list of saved views

Name	* All Active Contacts in ...
Description	Use this for a Marketing Lists containing all Active Contacts in MN or CO

Save
Cancel

CHANGING THE DEFAULT VIEW

The default view for a table is indicated by the **Default** label in the View selector. You can set a different view as your personal default.

In the following example, **Active Contacts** is set as the default. To change your default View to **All Active Contacts in MN or CO**:

- In the View selector, select **All Active Contacts in MN or CO** to apply the view to the grid page.
- Open the View selector again and select **Set As Default View**.
- To change your personal default view back to the original default view, select **Reset Default View** in the View selector.

Active Contacts in MN
👤

All Active Contacts in MN or CO
👤

All Contacts-Status Reason
👤

Contact Mailing List for Minnesota
👤

Contacts
👤

Active Contacts
Default

All Contacts

Contact Mailing List

⚙️ Set as default view
⚙️ Manage and share views

Active Contacts in MN
👤

All Active Contacts in MN or CO
👤
Default

All Contacts-Status Reason
👤

Contact Mailing List for Minnesota
👤

Contacts
👤

Active Contacts

All Contacts

Contact Mailing List

↶ Reset default view
⚙️ Manage and share views

MANAGING AND SHARING PERSONAL VIEWS

With the right permissions, you can share, assign, hide, rename, and delete views. In the view selector, select **Manage and Share Views**.

Active Contacts in MN

All Active Contacts in MN or CO **Default**

All Contacts-Status Reason

Contact Mailing List for Minnesota

Contacts

Active Contacts

All Contacts

Contact Mailing List

[Reset default view](#)

[Manage and share views](#)

Select View commands (...) and then choose your option.

Manage and share views: Contacts

Share views with your organization and manage your view list by hiding, renaming, and deleting views. [Learn more](#)

[Filter views](#)

Sort by

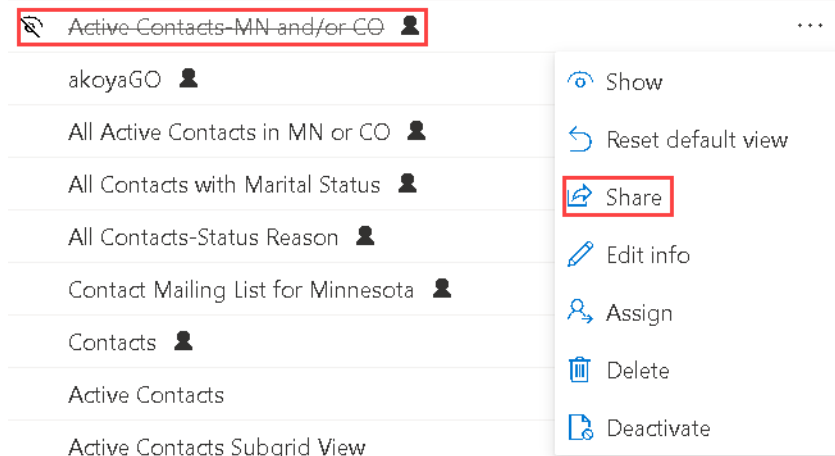
Active Contacts in MN	...
Active Contacts-MN and/or CO	...
akoyaGO	
All Active Contacts in MN or CO	
All Contacts with Marital Status	
All Contacts-Status Reason	
Contact Mailing List for Minnesota	
Contacts	
Active Contacts	
Active Contacts Subgrid View	
All Contacts	

- Hide
- Set as default view
- Reset default view
- Share
- Edit info
- Assign
- Delete
- Deactivate

SHARING A VIEW

Sharing a View allows other Users to use the View while you maintain ownership rights. Before you can share a personal view, it must be saved. To share a View, select a View and click on **Share**.

- In the view selector, select **Manage and Share Views**.
- Click on **Share**.



- **Add as many Users or Teams using Search.**

Share records

Manage who can see your record and how much access they get.

Changes made to all users or teams will be shared and options saved after clicking on the Share button.

Add user/team	
<input type="text" value="Claire"/>	Results from: Users Teams
Manage share access	<div> <div> Claire Nyenhuis claire@akoyago.com </div> </div>
<div> <div> </div> <div> Gail Sullivan </div> </div>	<div> + New Record Advanced lookup </div>
Select a person or group to assign their permission(s)	

- Select the User and then grant individual permissions: Read, Write, Delete, Assign, and/or Share. You can select one or more permissions per User.

Changes made to all users or teams will be shared and options saved after clicking on the Share button.

ASSIGNING A VIEW

Assigning ownership of the View to another User or Team in your organization can be done, but you give up all ownership rights. Assigning a View only appears on personal Views that you own. Before you can assign a personal View, it must be saved. To assign a View, select a View and click on **Assign**.

- In the view selector, select **Manage and Share Views**.
- Click on **Assign**.
- Select **Assign to User or Team**.
- Look up the User or Team and then select **Assign**.

Assign Saved View ×

You have selected 1 Saved View. To whom would you like to assign it?

Assign to

User or team

User or team

Gail Sullivan ×

Assign

Cancel

Remember: Once you have assigned a View to another user, you will not be able to edit or share it. Best Practice: Before assigning a View, let the User or Team know they will be owners of that View.

CHANGE THE ORDER OF VIEWS IN THE VIEW SELECTOR

By default, the view selector lists views in two groups, personal views and system views, each ordered alphabetically. You can change the sort order within groups or remove the grouping entirely and order the entire list alphabetically.

- In the view selector, select Manage and share views.
- Change the view selector sort order, and then select Apply.

The following sorting options are available:

- Personal before system, A to Z: This is the default. Both groups are ordered alphabetically. Personal views appear above system views.
- System before personal, A to Z: Both groups are ordered alphabetically. System views appear above personal views.
- A to Z: The grouping is removed. All views (system and personal) are presented in alphabetical order.

Manage and share views: Contacts

Share views with your organization and manage your view list by hiding, renaming, and deleting views. [Learn more](#)

Filter views

Sort by

Personal before system, A to Z

✓ Personal before system, A to Z

System before personal, A to Z

A to Z

All Active Contacts in MN or CO
Default ...

HIDING VIEWS

There may be times when the You can hide Views in the View selector to personalize the list and reduce clutter. You should keep some things in mind:

- When you hide a View, it's hidden from that table's views.
- If the View is shared with you and other team members, hiding it only hides the View for you. It's not hidden for everyone else who has access to the View.
- You can hide your Personal Views by default. You can hide System Views only if the administrator has allowed it.
- You can't hide a table's Default View. If you want to hide the Default View, set another View as the Default first.
- You can't set a Hidden View as the Default View for a table.

To hide a View:










- In the View selector, select **Manage and Share Views**.
- Hover over the View and select **Hide**. Or you can select View commands (...) to the right of the View, and then select **Hide**.
- Select **Apply**.

Manage and share views: Contacts

Share views with your organization and manage your view list by hiding, renaming, and deleting views. [Learn more](#)

Filter views

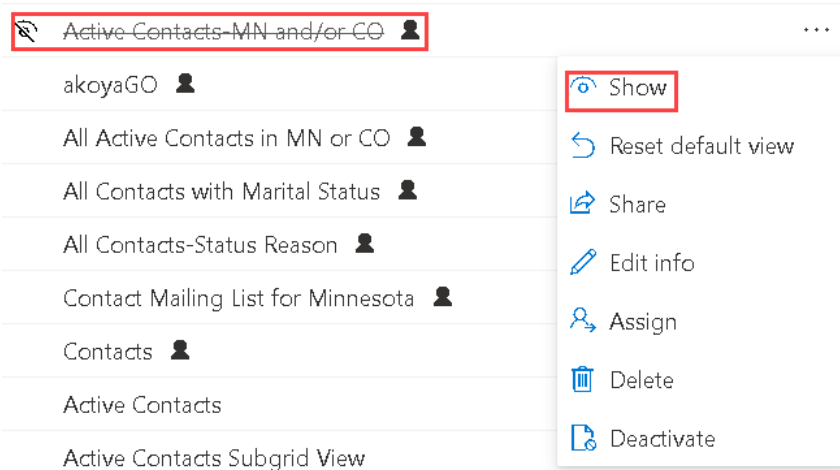
Sort by Personal before system, A to Z

Active Contacts in MN	...
 Active Contacts-MN and/or CO	...
akoyaGO	...
All Active Contacts in MN or CO	 Hide
All Contacts with Marital Status	 Set as default view
All Contacts-Status Reason	 Reset default view
Contact Mailing List for Minnesota	 Share
Contacts	 Edit info
Active Contacts	 Assign
Active Contacts Subgrid View	 Delete
All Contacts	 Deactivate
Contact Mailing List	

To restore a Hidden View:

- In the View selector, select **Manage and Share Views**.

- Hover over the View and select **Show**. You can also select View commands (...) to the right of the View, and then select **Show**.
- Select **Apply**.



DEACTIVATING OR DELETING A VIEW

The best practice is to deactivate a view. You may want to reactivate it later and change criteria. Highlight the View and select **Deactivate**.

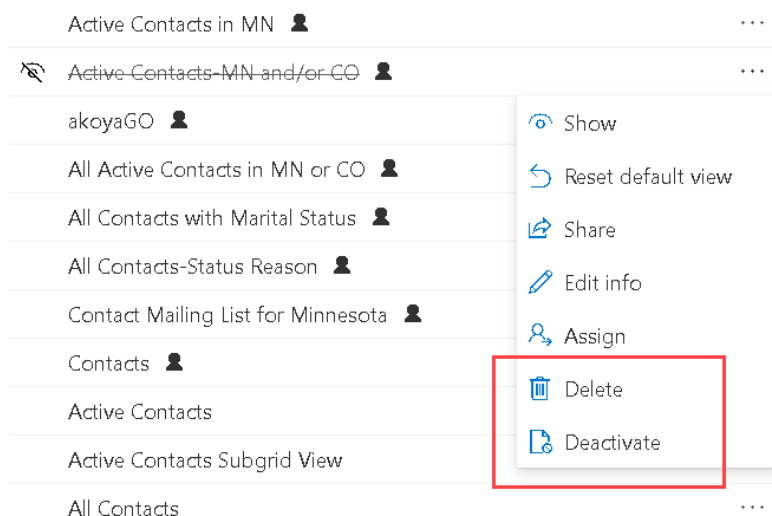
To delete a View, highlight the View and select **Delete**.

Manage and share views: Contacts

Share views with your organization and manage your view list by hiding, renaming, and deleting views. [Learn more](#)

Filter views

Sort by Personal before system, A to Z



Searching

There are multiple ways to search for a specific record.

Quick Search

Quick search is available in the top-right of the view. It searches for entries that match your search criteria for that entity type.

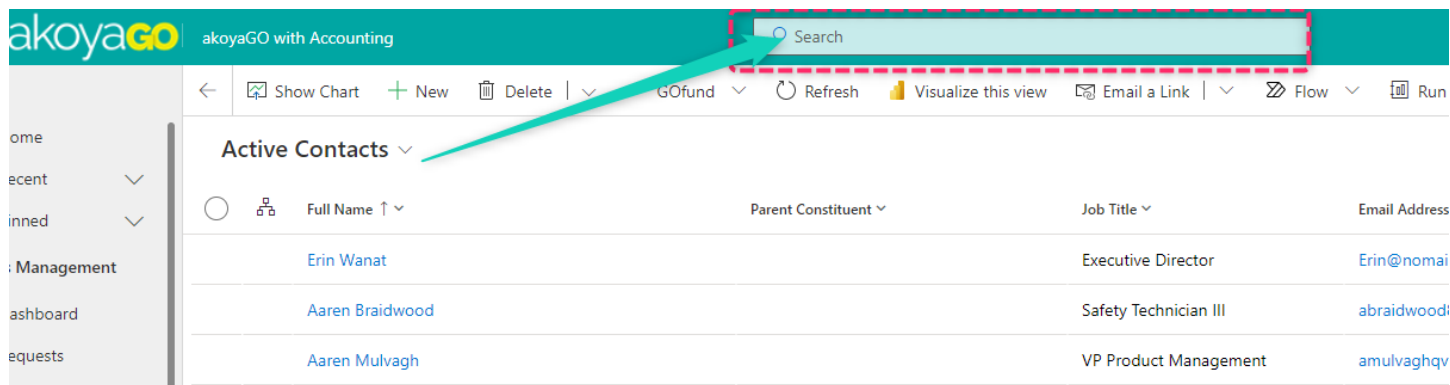
When using quick search, the results may not be all-inclusive. To pull in several records loosely based on your search, use a wildcard character in front of your search string. The wildcard is an asterisk *. If you are searching for Smith, you may need to enter *Smith.

You can use multiple search strings, each with an asterisk in front to help narrow down your search. For example, *School would find any records with School in the name. If you entered *Family *School, would find records that have both Family and School in the name.

Global Search

Global search does a search across entities. While quick search only looks within an entity, this type of search spans multiple areas within the system.

The global search bar can be seen at the very top of the screen and is visible throughout all workplaces and entities.



The screenshot shows the akoyaGO interface. At the top, there is a teal header bar with the akoyaGO logo and the text 'akoyaGO with Accounting'. To the right of this bar is a search bar with a magnifying glass icon and the word 'Search'. A red dashed box highlights the search bar, and a red arrow points to it from below. Below the header bar is a navigation bar with various icons and labels: 'Show Chart', 'New', 'Delete', 'GOfund', 'Refresh', 'Visualize this view', 'Email a Link', 'Flow', and 'Run'. Below the navigation bar is a table titled 'Active Contacts'. The table has columns for 'Full Name', 'Parent Constituent', 'Job Title', and 'Email Address'. The table contains three rows of data:

Full Name	Parent Constituent	Job Title	Email Address
Erin Wanat		Executive Director	Erin@nomai
Aaren Braidwood		Safety Technician III	abraidwoodi
Aaren Mulvagh		VP Product Management	amulvaghqv

When you first click within the search bar, a list of recently visited records and/or most recent searches will be shown. Similar to the “Recent” entity, this allows for a quick look at recent history.

akoyaGO with Accounting

Search

Show Chart New Delete GOfund

Active Contacts

Full Name ↑

Erin Wanat

Aaren Braidwood

Aaren Mulvagh

Aarika Cracker

Aarika Genny

Aaron Ciciari

Aaron Giannassi

Aaron Lamcken

Ab Crittal

Abagael Flatt

Abagael Siene

Abagael Vasilchikov

Abigail Bagnal

Abigail Blann

Abigail Lafayette

Abigail Lamba

Recent searches

Fund 006701

Scholarship

*Mary Winchester

Funds

00015

GOapply Settings

1000

GOapply Status Tracking

0001004

GOapply Status Tracking Attachments

For Reviewers

Requests

022939

Constituents

Youth Leadership and Sports Academy

Search for rows in a table using advanced filters

Email

Erin6

abra

amu

acra

ager

acici

agla

alam

acrit

aflat

asier

avas

abaç

abla

alafa

alam

Media Manager III

Forms

A form lists the details of an individual record. From a view, select an entry and it will open a form that displays the details for that record. You create, edit, and view details for a record on a form.

The command bar at the top of the form indicates actions you can take on the record. The 3 dots on the right of the command bar list other available actions.

akoyaGO Community Akoya Unified Interface Requests > 162252

Save Save & Close New Deactivate Delete Refresh Process Assign Share

162252 Request Request


Approved Request Status 4/28/2020 Decision Date Arts and Culture Program \$10,000 Grant /

Summary Payments & Requirements Project Scholarship Process Funding Opportunities Outcomes Interests

Title * Support for staffing ga... Timeline

Adding Constituents

Constituents define a company or organization. They are typically the grantee. To add a constituent, do the following.

1. Select Grants Management from the Navigation Bar, then select Constituents
2. Do a “Quick Search” to make sure the Constituent doesn’t already exist
3. Click on “New”
4. Enter all required information, and as much optional information that you have.
 - Enter the **Constituent Name** as it should appear in publications
 - Use **AKA** for acronyms and “formerly known as” data
 - akoyaGO will automatically add “https://” to the beginning of the **Website** field data
5. Click the save icon  **SAVE** in the upper left-hand corner of the screen to save your record


Adding Contacts

Contacts can be added independently or from a constituent form. Adding from the constituent form sets up an association between the contact and the constituent.

Every constituent needs a primary contact. You can create the contact from the constituent form. To add a contact from the constituent form, go to the email section and search for the contact. If it exists, select the correct contact and the association is created. If it does not exist, press the +New

You can also add a contact from the Organization Details section of the Constituent.

To add a contact without linking it to a constituent, select Grants Management from the Navigation Bar, then select Contacts. Always do a ‘quick search’ to make sure the contact doesn’t already exist. If it does not already exist, click on ‘New’

1. Enter all required information, and any optional information that you have
2. When you click on **Full Name**, you will see a pop-up window that displays the **First Name** and **Last Name** fields
3. Enter the **Salutation** as you would like it to appear in correspondence (e.g., “Mr. Bromelkamp” or “Henry”)
4. Assigning a **Parent Constituent** links the Contact record to that Constituent. The contact’s name will show in the list of Contacts for that Constituent on the Constituent form.
5. Enter address and communication information and any details that help you define the contact.
6. Click the save icon  **SAVE** in the upper left-hand corner of the screen to save your record

Grant Requests

Grant requests are a request for funds and define the amount of the grant. They are linked to the applicant (constituent) that will receive the request. For scholarships, it is also linked to the student requesting the grant (primary contact).


Find Grant Requests for a constituent

To find grant requests for a constituent, do the following:

1. Open the Constituent record for the Applicant. If the Constituent record doesn't exist, create it first.
2. Click the down arrow to the right of the record title in the Navigation Pane to view its related records.
3. Select Requests (Applicant) to view existing Request records for the Constituent
4. The Request Status is calculated based on the Grant Amount field (blank=pending, >0=approved, 0=denied)
5. The Grant Amount is a calculated field (Grant Amount = Original Grant + Grant Amendment)
6. To override the default Request Status, select an option from the Special Request Status field

Adding Grant Requests

To create a grant request, do the following:

1. Open the Constituent record for the Applicant
2. Select Requests tab to view existing Request records for the Constituent
3. Press + **New** a new Request
4. Enter as much detail as you have available to define the grant request.
 - **Title:** Describes the request
 - **Applicant:** automatically filled in with the constituent you started from
 - **Primary Contact:** If a scholarship, this is the student that is requesting the funds
 - **Program:** category for the grant. Scholarships are one of the choices and must be selected to define this grant as a scholarship.
 - **Amount Requested** – There are fields in the Project section for Amount Requested and purpose. The title is usually an indicator of the anticipated use of the funds
5. Click the save icon  **SAVE** in the upper left-hand corner of the screen to save your record

Award Grant Requests

To award a grant request, do the following:

1. Open the Constituent record for the Applicant.
2. Select Requests tab to view existing Request records for the Constituent
3. Select New Grant Request to add a new request
4. Define the request details.
5. Enter the amount to be paid in the **Grant Amount** field

Amend award for Grant Requests

To change the amount for a grant request, do the following:

1. Open the Constituent record for the Applicant.
2. Select Requests tab to view existing Request records for the Constituent
3. Select the Request you want to amend
4. Enter the amendment amount in the **Grant Amendment** field.

Denying Grant Requests

To deny a grant request, do the following:

1. Open the Constituent record for the Applicant.
2. Select Requests tab to view existing Request records for the Constituent
3. Select the Request you want to deny
4. Enter 0 in the **Grant Amount** field.

Adding payments for a grant request

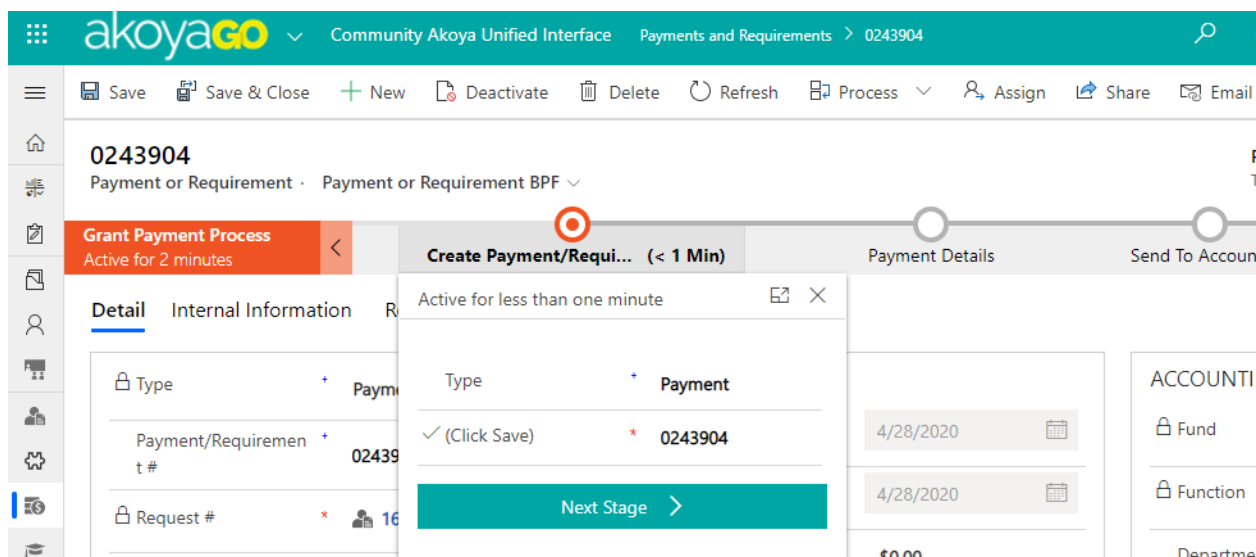
To schedule a payment for a grant request, do the following:

1. Open the Constituent record for the Applicant.
2. Select **Requests** tab to view existing Request records for the Constituent
3. Select the Request you want to pay
4. On the Request form, select the **Payments and Requirements** tab
5. In the **All Payments and Requirements** grid, select **New Payment**. If you don't see it, click the 3 dots to see more options

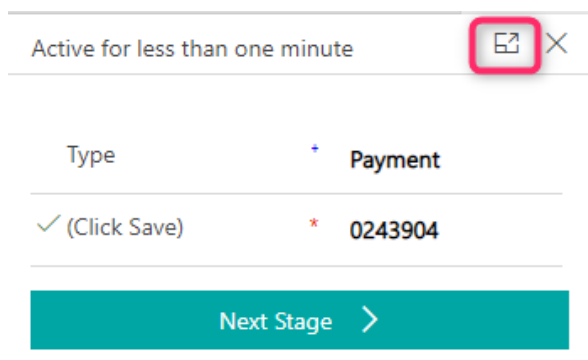
The screenshot shows the AkoyaGO interface for request 162251. The top navigation bar includes the AkoyaGO logo and the path: Community Akoya Unified Interface > Grants Management > Requests > 162251. The left sidebar contains various icons for navigation. The main content area has a tabbed interface with 'Payments & Requirements' selected. Below the tabs, there are sections for 'Next Payment Due' and 'Next Requirement Due', both showing a last updated date of 6/13/2020 11:57 AM. At the bottom, there is a grid titled 'All Payments & Requirements' with a '+ New Payment or Requ...' button highlighted.

6.

7. The payment processing window opens. Follow the process flow at the top ("bullseyes") to define the payment details. The process flow controls what you need to enter based on the payment type. Start by setting the type to **Payment** and click **Save**.



Note: you can dock the process flow window to the side of your screen by pressing the dock button highlighted in red below. Docking the window puts it to the right of your screen and remains in a consistent location throughout the payment process.



8. Press **Next Stage** to continue to the next stage in the payment process.
9. Continue through the payment processing steps entering the details that define the payment. At the end of each step, press **Next Stage**.

Note: What you enter on the memo field will be the text that is displayed on the check

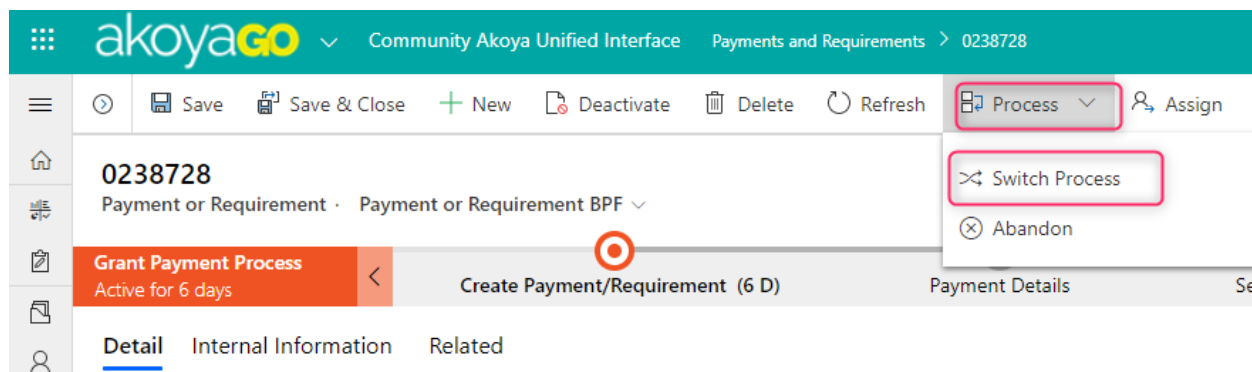
10. The last step in the process flow is transferring the payment to accounting. Enter "Go" in the folio field to transfer the payment to accounting. Folio will be updated to "Received" when the request is successfully transferred. When the payment is made in accounting, the folio will update to "Paid" and the payment date and check # will be updated.

Reversing Grant Requests

To reverse a payment for a grant request, you start the reversal in akoyaGO, not in your accounting system. To do a reversal, do the following:

1. Select the Request that needs a payment reversed

2. Select the **Payments and Requirements** tab
3. Select the Payment you want to reverse
4. Select **Process** then **Switch Process**



5. A dialog is displayed giving you options for which process to perform. Select **Reverse a Grant Payment** and press **OK** to start the reversal process.

Switch Process

Select a different process.

✓ Instance Name	Modified On
Grant Payment Process	6/7/2020
✓ Reverse a Grant Payment	---

6. The process flow changes to reflect the reversal process. Select **Initiate Reversal** and select the reversal type, the reversal amount, and the reversal date. Press **Next Stage** to continue.

The screenshot shows the 'Initiate Reversal (< 1 Min)' dialog box. It has a title bar with a red target icon. The dialog is titled 'Initiate Reversal (< 1 Min)' and has a subtitle 'Active for less than one minute'. It contains three input fields: 'Reversal Type' (set to 'Refund'), 'Reversal Amount' (set to '---'), and 'Reversal Date' (set to '---'). A 'Next Stage >' button is at the bottom.

7. You will be prompted to confirm the reversal amount. Press OK to continue. When you press OK, the reversal is sent to the accounting system.
8. The reversal confirmation is displayed. Click Finish to complete the transaction.

Adding requirements or conditions for a Grant Request

Requirements can be stand-alone or tied to a payment. If you have conditions for a specific payment, you would indicate that during the payment process.

Payment Details (1 Min)

Active for 1 minute

✓ Posting Date * 4/28/2020

✓ Est. Grant Pay Date 4/28/2020

✓ Fund * 03169

✓ Account * 5..

Memo ---

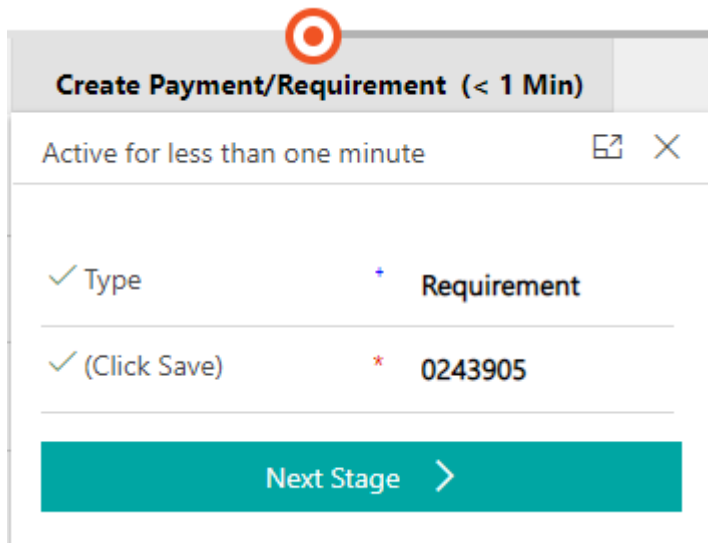
✓ Requirements? Yes

Function * ---

< Next Stage >

To add a stand-alone requirement or condition to a grant request, do the following:

1. Select the Request you to which you want to add a requirement or condition.
2. Select the **Payments & Requirements** tab
3. Click **+New Payment**
4. When payment/requirement form is displayed, select the **Create Payment/Requirement** process step and set the type to **Requirement**. Click Save to define the requirement process. Note that your process flow will be updated to collect the details about your requirement. Press **Next Stage** to start defining your requirement.



Create Payment/Requirement (< 1 Min)

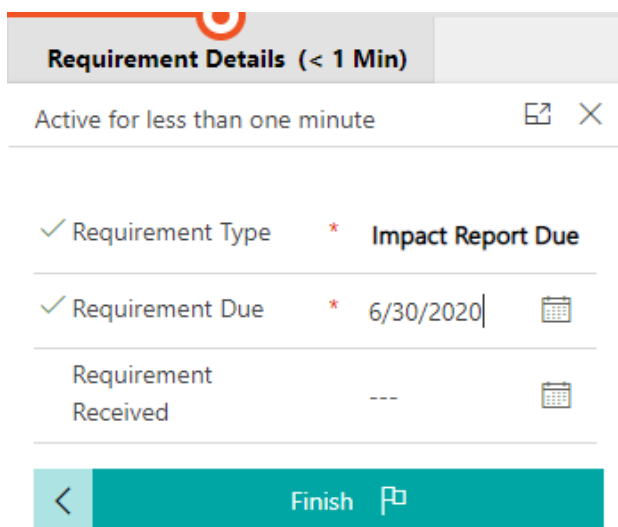
Active for less than one minute

✓ Type + Requirement

✓ (Click Save) * 0243905

Next Stage >

5. Define the requirement and set the requirement due date. Press **Finish**.



Requirement Details (< 1 Min)

Active for less than one minute

✓ Requirement Type * Impact Report Due

✓ Requirement Due * 6/30/2020

Requirement Received * ---

< Finish >

Donors and Prospects


Donors and Prospects are part of Donor Management and define donors and potential donors.

Adding a Donor

To add a Donor, do the following.

Defining a Donor that is an individual


1. Select Donor Management from the Navigation Bar, then select Donors and Prospects
2. Do a "Quick Search" to make sure the Donor doesn't already exist
3. Click on **+New** on the command bar of the Donors and Prospects view.
4. Enter the name of the donor in the **Formal Default** field. This is the name that will be associated with the donor and will appear in publications.

5. In the **Primary Contact** field, select the contact record that defines the donor. If the contact is not defined, press New Contact to define the contact.
6. If this is a household and you want both the husband and wife listed, define the spouse on the Secondary Contact field.
7. Enter all other details available for the donor.
8. Click the save icon  **SAVE** in the upper left-hand corner of the screen to save your record

Defining an Organizational Donor

1. Select Donor Management from the Navigation Bar, then select Donors and Prospects
2. Do a “Quick Search” to make sure the Donor doesn’t already exist
3. Click on **+New** on the command bar of the Donors and Prospects view.
4. Enter the name of the donor in the **Formal Default** field. This is the name that will be associated with the donor and will appear in publications.
5. The **Donor Type** defaults to **Individual/Household**. If this is an organizational donor, click on the Individual/Household and it will switch to Organization. The form changes to collect the constituent details instead of the primary contact.

The screenshot shows the 'New Donors & Prospects' form in the akoyaGO interface. The top bar includes the akoyaGO logo and the text 'Community Akoya Unified Interface'. Below the bar is a navigation menu with icons for various functions. The main form area has tabs for 'General', 'Funds', 'Interests', 'Gifts', 'Assets', 'Referral History', and 'Internal Information'. The 'General' tab is selected. The form contains several input fields: 'Formal Default' with the value 'Williams Industries', 'Anonymous' with the value 'No', 'Donor Type' with the value 'Organization', 'Donor Constituent' with the value '---', and 'Address to Use' with the value 'Constituent'. A blue dashed box highlights the 'Donor Constituent' and 'Address to Use' fields. To the right of the main form is a 'Timeline' section.

6. Enter all other details available for the donor.
7. Click the save icon  **SAVE** in the upper left-hand corner of the screen to save your record

Gifts

Gifts are a part of Donor Management and define donations made to the foundation.

Select the Donor Management workspace and search for the donor that has made a gift. If the donor does not exist, define the donor.

Adding a Gift

To add a Gift, do the following.

1. Select Donor Management from the Navigation Bar, then select Donor.
2. Find the donor making the gift and open the donor
3. Select the **Gifts** tab of the form
4. Press **+New Gift** to add a gift. If you do not see New Gift, press the 3 dots to display options

akoyaGO Community Akoya Unified Interface Alan and Wendy

Save Save & Close New Deactivate Delete Refresh Email a Link Flow

Alan and Wendy Donors & Prospects 2/6/2020 Most Recent Gift Date \$10,000.00 Total Commitment

General Funds Interests **Gifts** Assets Referral History Internal Information Related

HISTORY

Total Commitment \$10,000.00

Last updated: 6/14/2020 9:57 AM

Most Recent Gift Date 2/6/2020

Last updated: 6/14/2020 9:57 AM

Gifts by Donor

Gift #	Donor	Gift Date	Commitment	Gift Type
---	Alan and Wendy	2/6/2020	\$10,000.00	Gift

+ New Gift

5. The Gift form opens. Enter the amount of the gift in the **Commitment** field.
6. Enter the date of the gift in the **Gift Date** field
7. Enter any other details available.
8. Click the save icon **SAVE** in the upper left-hand corner of the screen to save your record

Adding a gift payment

To add a gift payment

1. Find the donor making the gift and open the donor
2. Select the Gifts tab of the form
3. Select the **Gift** to open the Gift form.

Alan and Wendy Donors & Prospects 2/6/2020 Most Recent Gift Date \$10,000.00 Total Commitment

General Funds Interests **Gifts** Assets Referral History Internal Information Related

HISTORY

Total Commitment \$10,000.00

Last updated: 6/14/2020 9:57 AM

Most Recent Gift Date 2/6/2020

Gifts by Donor

Gift #	Donor	Gift Date	Commitment	Gift Type
---	Alan and Wendy	2/6/2020	\$10,000.00	Gift

Edit

4. Select the **Gift Payments** tab. If you do not see the Gift Payments tab, selected Related to see related entities and select Gift Payments.
5. Press **+New Gift Payment** to add a new gift payment


The screenshot shows the akoyaGO interface with the 'Gift Payments' section selected. The gift number 325114 is displayed at the top. Below the navigation tabs, the 'New Gift Payment' button is highlighted with a red box. The interface also shows a table of gift payments with columns for Payment ID, Donor, Posting Date, Amount, Check Date, and Payor.

Payment ID	Donor	Posting Date	Amount	Check Date	Payor
0581228	Alan and Wendy	2/6/2020	\$10,000.00	---	Alan and Wendy

- The Gift Payment form opens. Follow the process flow to define the gift details. Start by pressing the **Select Payment Type** gift processing step. The process flow will control what you need to enter based on the payment type..

The screenshot shows the akoyaGO interface with the 'Gift Payment Process' section selected. The gift number 0583942 is displayed at the top. Below the navigation tabs, the 'Select Payment Type' step is highlighted with a red circle. The interface also shows a table of gift payments with columns for Payment ID, Donor, Posting Date, Amount, Check Date, and Payor.

Payment ID	Donor	Posting Date	Amount	Check Date	Payor
0583942	Alan and Wendy	2/6/2020	\$10,000.00	---	Alan and Wendy


- Enter the **Payment Type**
- Click the save icon  in the upper left-hand corner of the screen to save the payment.
- Press **Next Stage** to continue entering payment information
- Enter the details for the type of gift. The process flow helps you enter the required details based on the payment type you selected. For checks, it would be the **Check Date** and **Check Number**.
- Enter the **Fund** to receive the gift.
- Enter the **Account** to receive the funds. It must be an account in the 4000 range.
- Enter the **Department** and **Function** for the gift.
- Press **Next Stage**.
- Enter go in the **folio** and press **Next Stage** to send the payment to accounting.
- The **folio** will update to Received when it is accepted by Business Central.

Fund Management

The Fund Management workplace has fund and accounting entities listed. Select the Funds Management workplace on the Navigation Bar to see a list of funds.

Creating a fund

To add a fund, do the following.

1. Select Funds Management from the Navigation Bar, then select Funds
2. Do a "Quick Search" to make sure the Fund doesn't already exist
3. Click on "New"
4. Enter all required information, and as much optional information that you have.
 - Enter the **Fund Name** that uniquely identifies the fund
 - Set a **Primary Contact** for the fund. You can add the contact from here if it doesn't exist.
 - Set the **Fund Type** (donor advised or pass-thru)
 - DT stands for Due To. The fund needs to have 100% of its assets allocated to one or more pools in any percentage wanted. If changing pools at a later date, put an end date in one already allocated and create a new one.
5. Click the save icon  SAVE in the upper left-hand corner of the screen to save your record

Accounting

akoyaGO is an **accrual-basis** accounting system, meaning revenues/expenditures are recorded when they are incurred, regardless of when cash is exchanged.

Double Entry accounting

AkoyaGO is a double-entry accounting system. This means that for every transaction, there are at least two entries: one in assets/liabilities and another in revenue/expenditures. The total of debits must always equal total of credits for the transaction. For example, the double-sided entry (transaction) for a grant payment of \$500 might look like this:

Expenditures - Grants Disbursement (5010)		Liability - Grants Payable (2030)	
Debit	Credit	Debit	Credit
\$500.00			\$500.00

Or the transaction for a contribution might look like this:

Revenue - Contributions (4010)		Asset - Contributions Receivable (1500)	
Debit	Credit	Debit	Credit
	\$500.00	\$500.00	

The following table summarizes the akoyaGO account categories

Defining Gifts and Payments is done in akoyaGO. The actual transfer of funds is done in Business Central. The following defines the flow of payments and gifts.



Dimensions

akoyaGO has 3 standard dimensions that are required for accounting

- **Fund** – represents donor funds managed by the foundation. This is required for all transactions.
- **Department** – Group of funds, sometimes for an affiliate organization or sub-entity of the foundation; this is required for all transactions. The default is one department (01).
- **Function** - represents a unit within the operations of the foundation such as Fundraising, Program, or Operations

Net Assets

Each revenue and expenditure account nets to a specified “Net Asset” account (numbered between 3000 and 3999) in order to track the change in spendable, non-spendable, accumulated earnings, and other categories of assets.

For example, when receiving the contribution below, if the net account for account 4010 is account 3000 (net assets – spendable), this gift would increase the spendable balance of this fund by \$500.

Net assets on a balance sheet are defined as the amount by which your total assets exceed your total liabilities and is calculated by simply adding what you own (assets) and subtract it from whatever you owe (liabilities).

akoyaGO uses Net Assets to determine fund balances.

Glossary

Term	Workplace	Description
CRM		Customer Relationship Management. A database that allows you to keep track of relationships and interactions. Helps foundations stay connected to customers and streamline processes.
System View		"Out of the box" views set up within akoyaGO. You can customize your own view and save them, so they show up under "My Views"
Workplace		A collection of entities that pertain to a certain sector of business. In akoyaGO, our workplaces are Grants Management, Donor Management, and Fund Management
Entity		A collection of tables in each workplace. Each entity consists of records, and each record consists of fields/columns
Constituents	All	Constituents are places – organizations, businesses, nonprofits, etc. The Constituent Record holds the basic information about an organization and connects to one or multiple contacts.
Contacts	All	Contacts are people – they can be associated with a constituent or not. Contact records hold the basic contact information for individuals.

Committees	All	Committees are collections of contacts which are grouped for a specific purpose.
Requests	Grants Management	The Request entity houses the information associated with a request for funding by an organization – aka grant records, or an individual – aka scholarship records.
Funding Opportunities	Grants Management, Fund Management	Only in akoyaGO with Accounting. A funding opportunity tracks the foundation's proposal to a Fund for support of a Request. After a Request is received, the foundation can share it with fund holders as a Funding Opportunity. Funding Opportunities are also available in the Fund Management workplace.
Payments and Requirements	Grants Management, Fund Management	In the Payments and Requirements entity you'll find two record types that are linked to Requests. Payment records detail the payment information on the Request – things like how much was paid out, which fund did the money come from and when it was paid. Payments are used to create entries in akoyaGO's integrated accounting platform. Requirement records keep track of any conditions or contingencies related to the Request or specific Payment e.g., a report, a contract, or a transcript. Payments and Requirements is also available in the Fund Management workplace.
Term	Workplace	Description
Scholarships	Grants Management, Fund Management, Donor Management	The Scholarships entity tracks the scholarship programs administered by the foundation. On a Scholarship record you'll find conditions, eligibility requirements, and other details. Interfund Grants (akoyaGo Community) An Interfund Grant is a transfer of money from one fund to another within the foundation. Interfund Grants is also available in the Donor Management and Fund Management workplaces.
Interfund Grants	Grants Management, Fund Management, Donor Management	Interfund records allow you to create Request and Gift records for a transfer of money between funds. When fiscally transferred, a journal entry is created in akoyaGO's integrated accounting. Interfund Grants is also available in the Donor Management and Fund Management workplaces.
Concepts	Grants Management	Concepts are a developing idea that may progress into a grant or another foundation initiative
Interests	Grants Management, Fund Management, Donor Management	The Interests entity is a shared list of categories that can be applied to Requests, Funds and Donors. Interests can be used to connect requests with specific Donors or Funds.
Programs	Grants Management	Programs are categories or areas of giving your foundation supports. Programs are specific to Requests.

Program Budgets	Grants Management	Program Budgets allow you to set an amount you intend to fund in a specific Program.
Fiscal Year	Grants Management	A Fiscal Year is a defined period of time used for Program Budgets.
Outcomes	Grants Management	Measurable results pertaining to Requests funded by the foundation.
Outcome Measures	Grants Management	User defined units for quantitative and qualitative analysis of Outcomes.
Donors & Prospects	Donor Management	Donors & Prospects are individuals, households or organizations who have given or may give to the foundation. Individual or Household donors must be linked to a Contact record, and Organizations must be linked to a Constituent record
Donor Opportunities	Donor Management	Donor Opportunities allows you to track your stewardship of a donor for a specific purpose such as – a gift, starting a fund, volunteering, a bequest, etc.
Gifts	Donor Management	Gift records track money committed to your foundation by a Donor.
Term	Workplace	Description
Gift Payments	Donor Management, Fund Management	A Gift Payment the receipt of funds toward a Donor commitment (Gift). This includes information such as the payment type, the payment date, and to which fund the money was credited. Gift Payments is also available in the Fund Management workplace.
Campaigns	Donor Management	A campaign is an initiative made up of one or more Activities - a capital campaign, for example.
Gift Fees	Donor Management, Fund Management	The Gift Fees allows you to define types of fees that be applied to Gift Payments - such as PayPal or Credit Card fees
Events	Donor Management	Through the Events entity, you can create records that track the attendees and planning information for events hosted by your foundation.
Interests	Grants Management, Donor Management, Fund Management	The Interests entity is a shared list of categories that can be applied to Requests, Funds, and Donors. Interests can be used to connect requests with specific Donors or Funds.
Proposals	Donor Management	A Proposal is a request for funding to an outside agency - for example, to receive a grant.
Referrals	Donor Management	Referrals are used to soft credit Donors for bringing Gifts to the foundation.
Marketing Lists	Donor Management	Marketing Lists are lists of Contacts or Constituents manually selected or be based on a set of criteria.

Quick Campaigns	Donor Management	Quick Campaigns are used to distribute a single activity, such as a mailing, a phone call or task, to selected Constituents, Contacts, or Marketing Lists.
Funds	Fund Management	A fund is a pool of money used for a specific purpose. Types of Funds include donor advised, scholarship, agency endowment, designated, field of interest, etc.
Accounts	Fund Management	Account records are used to sort, store, and summarize financial transactions including assets, liabilities, net assets, income, and expenses.
Term	Workplace	Description
Payments and Requirements	Fund Management	In the Payments and Requirements entity you'll find two record types that are kinked to Requests. Payment records detail the payment information on the Request - things like how much was paid out, which fund did the money come from and when it was paid. Payments are also fiscal transferred to akoyaGO's integrated accounting. Requirement records keep track of any reports that the applicant is required to complete in exchange for your foundation funding their project.
Scheduled Distributions	Fund Management	A Scheduled Distribution is a predefined recurring grant made to a specific recipient.
Gift Fees (Fund Management)	Fund Management	The Gift Fee entity allows you to set up reoccurring fees that gifts may incur, such as PayPal or Credit Card fees. When you set a Gift Fee record up, you'll be prompted to add it to a Gift Payment in our Gift Payment Business Process Flow.
Accounting Settings	Fund Management	Accounting Settings are organization level settings used with the integrated accounting platform, Business Central.
Departments	Fund Management	A department is a group of funds, sometimes for an affiliate organization or a sub-entity
Functions	Fund Management	A function is a unit within the foundation such as fundraising, program, or operations. Functions are assigned to income or expense transactions.
Reports	Tools	Within the Reports entity you'll find a list of all the supplied or custom reports for your organization and where you can create your own custom reports.
Fund Fee Formulas (akoyaGO with Accounting)	Tools	Fees charged to funds administered by the Foundation. Fund Fee formulas are set here

Spendable Allotment (akoyaGO with Accounting)	Tools	The target amount each year that a fund is permitted to spend. The formula for spendable allotment is set here.
Service Areas	Tools	The list of Service Areas can be managed here. A service area can be designated on the Request record.
Project Areas	Tools	The list of Project Areas can be managed here. A Project area can be designated on the Request record.
Scholarships	Tools	Your list of scholarships can be managed here. Scholarships are selected on the Request record.