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CONFERENCE
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USER CONFERENCE 2023

MAXIMIZING THE DONOR
EXPERIENCE IN GOFUND

PRESENTED BY
ALYSON BELVIN

SESSION OVERVIEW

- GOfund settings
- Registration process
- Actionable items the donor can take
- GOfund and how it relates to the CRM
- Troubleshooting

GOfund SETUP

GOfund settings: General tab

The screenshot displays the 'GOfund Settings' interface for a user named 'fu 1000'. The top navigation bar includes options like Save, Save & Close, New, Deactivate, Delete, Refresh, Check Access, Assign, Flow, Word Templates, Run Report, and Share. Below the navigation bar, the 'General' tab is selected, showing various configuration options. The 'Enable Fund Statement' toggle is set to 'Yes', and 'Enable Fund Details as start page' is set to 'No'. The 'Foundation User' is listed as 'Accounting Testing User (Offline)', and 'Enable Documents' is set to 'Yes'. The 'GOfund URL' is set to 'https://gofund.akoyago.com/empowered'. The 'Sign In' section shows 'Allow Sign Ins' set to 'Yes' and 'Enable 2FA' set to 'No'. A text area for 'Sign In Instructions Text' contains the placeholder text 'Sign In Instructions'. The bottom of the interface features a rich text editor toolbar.

fu 1000 - Unsaved
GOfund Settings

General Theme Home Page Recommend Grant Form FAQ Page Related

Enable Fund Statement * ☒ Yes

Enable Fund Details as start page * ☐ No

Foundation User * Accounting Testing User (Offline)

Enable Documents ☒ Yes

GOfund URL <https://gofund.akoyago.com/empowered>

Sign In

Allow Sign Ins * ☒ Yes

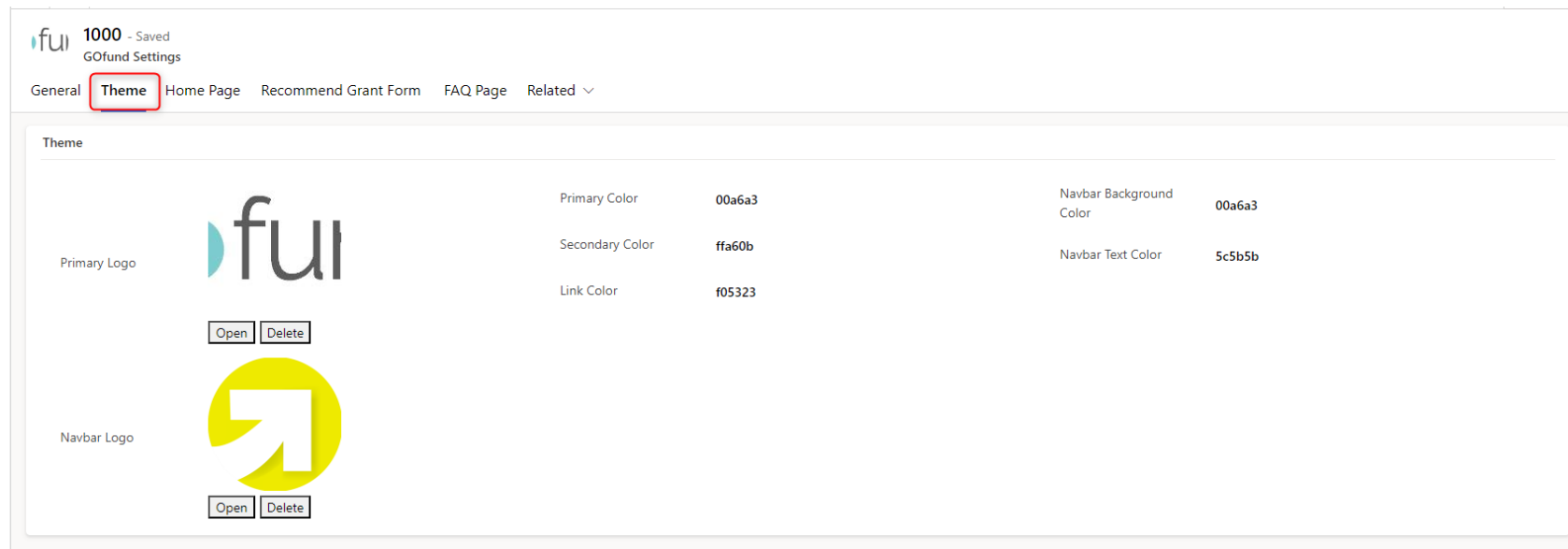
Enable 2FA * ☐ No

Sign In Instructions Text

Sign In Instructions

GOfund SETUP

GOfund Settings: Theme tab



The screenshot shows the 'Theme' tab in the GOfund Settings interface. The breadcrumb trail at the top reads '1000 - Saved GOfund Settings' followed by tabs: 'General', 'Theme' (highlighted with a red box), 'Home Page', 'Recommend Grant Form', 'FAQ Page', and 'Related'. The 'Theme' section contains two logo upload areas: 'Primary Logo' with the 'fui' logo and 'Navbar Logo' with a yellow circular logo. To the right of these are color settings: 'Primary Color' (00a6a3), 'Secondary Color' (ffa60b), 'Link Color' (f05323), 'Navbar Background Color' (00a6a3), and 'Navbar Text Color' (5c5b5b). Each logo area has 'Open' and 'Delete' buttons.

Setting	Value
Primary Color	00a6a3
Secondary Color	ffa60b
Link Color	f05323
Navbar Background Color	00a6a3
Navbar Text Color	5c5b5b

Looking for a HEX color finder: <https://htmlcolorcodes.com/color-picker/>


GOfund SETUP

GOfund settings: Home Page tab

ifu 1000 - Saved
GOfund Settings

General Theme **Home Page** Recommend Grant Form FAQ Page Related ▾











Enable Home Page ☒ Yes Home tab label Home

Hero Image 

[Open](#) [Delete](#)

Content Text

Content Text

Font Size B I U          

Make a Grant Recommendation Color ffa60b

Grant History Color f05323

News Feed URL ---

GOfund SETUP

GOfund settings: Recommend Grant Form tab

The screenshot shows the 'Recommend Grant Form' tab in the GOfund settings. The page has a header with '1000 - Saved GOfund Settings' and navigation links: 'General', 'Theme', 'Home Page', 'Recommend Grant Form' (highlighted with a red box), 'FAQ Page', and 'Related'. Below the header, there are two main sections: 'Page Options' and 'Form Options'.

Page Options

- Header Text Alert Type:** alert-info
- Header Text:** Thank you for your recommendation! Please be aware that all recommendations are subject to foundation approval.

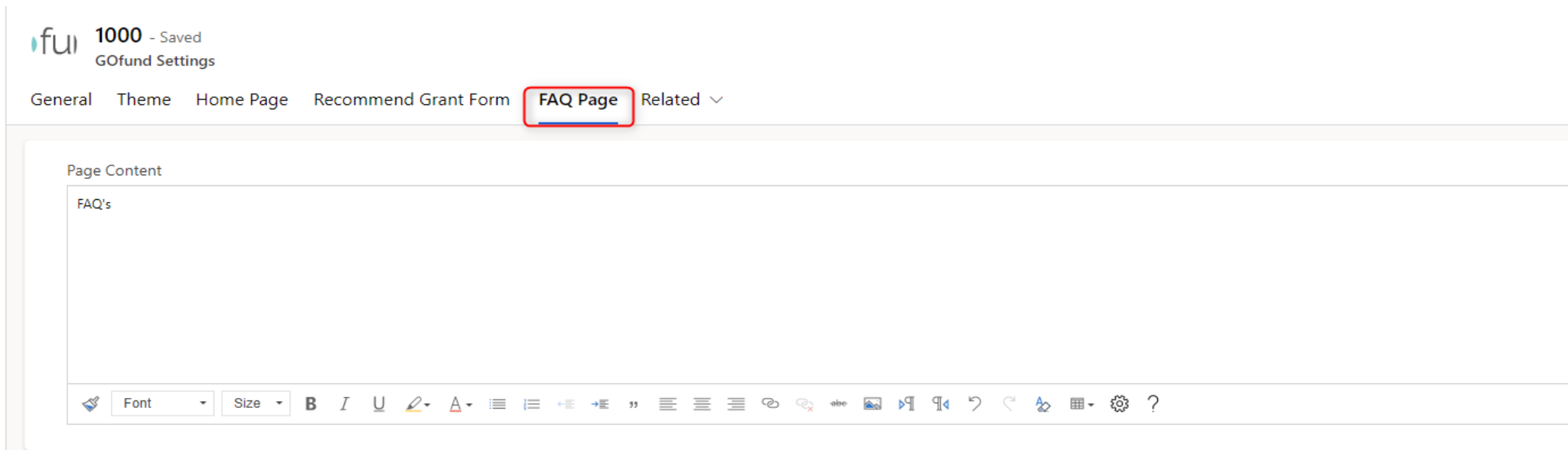
Form Options

- Enable Recurring:** ☒ Yes
- Minimum Amount:** \$20.00
- Timing of grant helper text:** grant timing rules
- Allow File Upload:** ☒ Yes
- Grant Type Restricted Label:** ---
- Grant Type Unrestricted Label:** ---
- File Upload Label:** Upload Supporting Documentation

Certification Text
Success Submit Page message

GOfund SETUP

GOfund settings: FAQ Page tab



The screenshot displays the GOfund settings interface. At the top left, there is a logo 'fu' followed by '1000 - Saved' and 'GOfund Settings'. Below this, a navigation bar contains several tabs: 'General', 'Theme', 'Home Page', 'Recommend Grant Form', 'FAQ Page' (which is highlighted with a red box), and 'Related' with a dropdown arrow. The main content area is titled 'Page Content' and contains a large text box labeled 'FAQ's'. At the bottom of the text box is a rich text editor toolbar with various icons for text formatting (bold, italic, underline, color, background color), alignment, indentation, and other editing functions.

Rich Text Editor to customize your FAQ page for your foundation's GOfund site

FUND CONNECTIONS

Connection for GOfund: Donor Portal Access (GOfund)

- This connection is the **ONLY** connection that should be used when connecting donors to GOfund
- Once this connection role is chosen, you will be able to set donor-specific permissions in the "Donor Portal Access" section of the connection form
- Don't forget to fill in the "Start Date" for the connection (required field)

REGISTRATION PROCESS – Importance of Testing

- GOfund log (sign in, reset passwords)
- Contact's timeline activity
- Edit email template

EXPLORING THE USER INTERFACE (UI)

1. Edit views that will show up in the UI
2. Fund Statement layouts
3. Donor permissions
4. Contact Us information
5. Documents --> SharePoint
 - a) Ex. Tax receipts, fund agreements
 - b) Global documents vs. Fund specific
6. Home page / RSS Feed
7. What actions can a donor take?
 - a) Recommend
 - b) Repeat
 - c) View history

GOfund --> CRM

- GOfund Usage Metrics dashboard
- Requests
- Interfund Grants

GOfund: TROUBLESHOOTING

- Using the FAQ page to assist donors
- Login issues:
 - Staff can check GOfund Usage Metrics dashboard to confirm recent GOfund logins and password resets
 - Users can now self-serve to request a new invitation link (new feature!)
- Changing Fund Statement Layout for a fund
 - Note: Edits to the Fund Statement must be edited in Business Central
- Utilizing the Impersonate feature!

THANK YOU

Presented By

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