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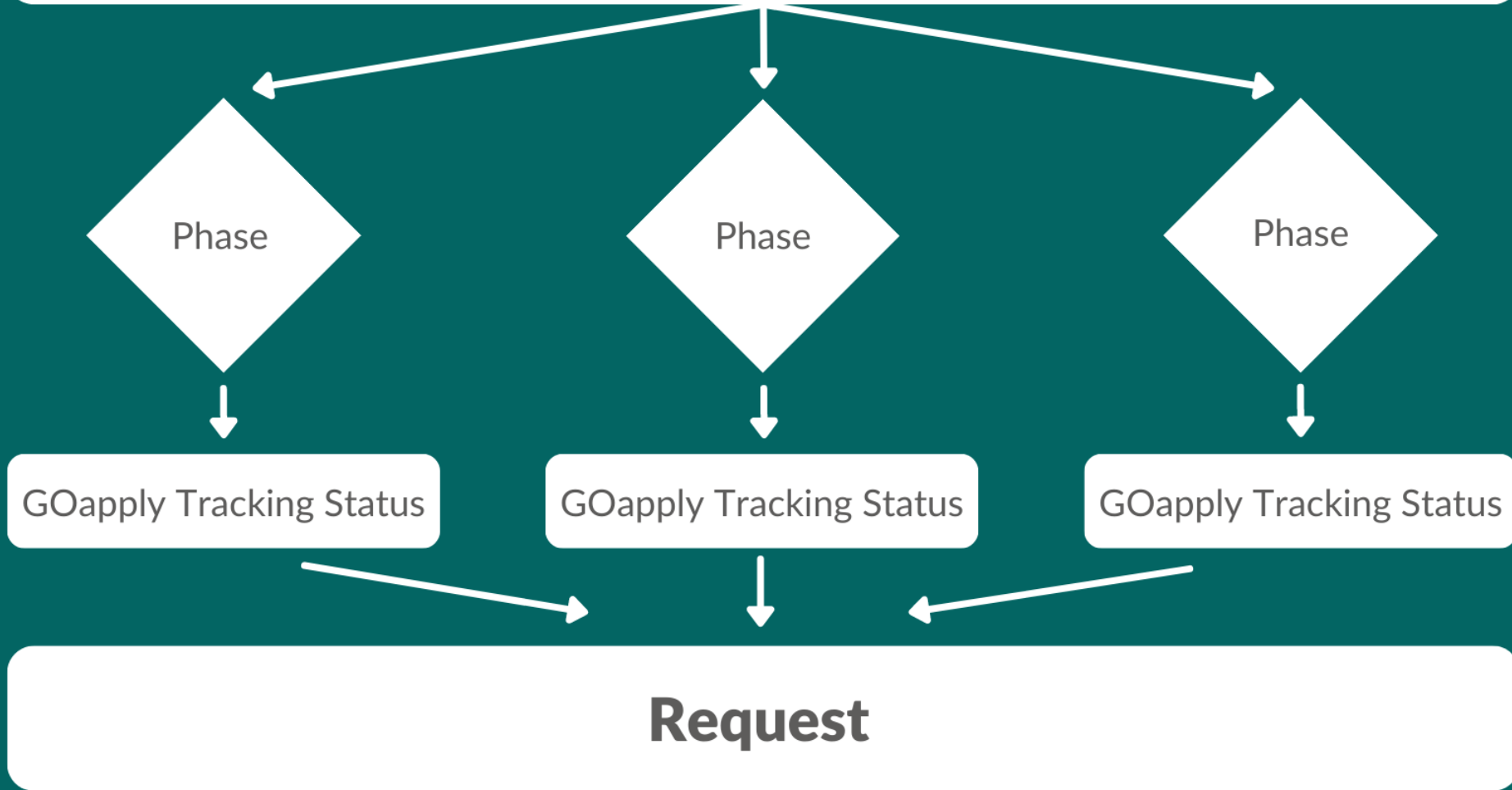
GRANT MOVEMENT IN GOapply AND CRM

PRESENTED BY
ZOEY FIFE

GOapply AND REQUEST

How do they interact?

GOapply Application/Opportunities



akoyaGO

REQUESTS AND GOapply

- Multiple GOapply status tracking records can be related to one request
 - This is an important way to manage phases like acceptance and reporting phases
- KEY CONCEPT: Each phase or submission needs a NEW GOapply Status Tracking record








REQUESTS AND GOapply

EXAMPLE:

- This GOapply StatusTracking is for a final report phase
- Notice the Request field is populated, BEFORE the “current phase status” is “submitted”

0001009 - Saved
GOapply Status Tracking

General Internal Related ▾

GOapply Applicant Organization	 Youth Leadership and Sports Academy
GOapply User	---
GOapply Application	 001002
GOapply Application Name	Grant Application
Request	 022939 
Current Phase	 001003
GOapply Phase Name	Final Report
Override Phase Due Date	--- 
Current Phase Status	In Progress 
Progress (%)	1

REQUESTS AND GOapply

- When a GOapply Status tracking record is submitted and the request field has been pre-populated, the submission will UPDATE the request instead of creating a new one
- This also applies to any Payment or Requirement panels included in the phase

ADVANCING APPLICATIONS

From Request:

1. GOapply advance to next phase
 - Creates a status tracking record and autofills the next phase based on phase order
2. GOapply advance to final report phase
 - Creates a status tracking record and autofills the final report phase based on phase type

Both options will include the existing request in the status tracking

MAPPING TO PAYMENT/REQUIREMENT

As with any other non-request record, fields in Payment/Requirement must be in a panel

Requirement Panel			
Pannel Mapping: Child of Request			
Question Title (Gomanager)	Target Entity	Target Field	
Type	Payment or Requiremen	Requirement Type	Drop down in akoyaGO- should default to 'Requirement' Should be hidden
Requirement Received	Payment or Requiremen	Req. Received	Date field- default value should be 'today()' Should be hidden
Requirement Type	Payment or Requiremen	Req. Type	Drop down in akoyaGO-options should match that: see screenshot
			REQUIREMENT DETAIL
		Req. Type	Final Report
		Req. Due	--Select--
		Req. Received	Condition
			Interim Report
			Final Report
			Match
			Satisfactory Progress
			Site Visit

PAYMENT/REQUIREMENT PANEL

question1

Submit Date

mm/dd/yyyy

≡

✖ ✎ ✂ 📄 📋 Dropdown ▾ ⚙ Properties ➤

Select... Edit Choices

Interim Report

+ Other None

AkoyaGO ⬆

☒ Child of Request

☐ Hide from Reviewer

☐ Create New If Not Found

Tooltip

PAYMENT/REQUIREMENT FIELD MAPPING

AkoyaGO ^

Target entity

Payment or Requirement v

Target field

Requirement Received v

☐ Hide from Reviewer

☐ Lookup Field

☐ Overwrite Field

Logic ^

Visible if

Expression is empty v

Enable if

Expression is empty v

Required if

Expression is empty v





Default value expression (?)

today()

GOapply SUBMITTED APPLICATION PAGE

Did you know?

You can use the GOapply submitted application page to provide applicants with important dates

Submissions							
<div>IN PROGRESS</div> <div>SUBMITTED</div>							
	Opportunity Name	Most Recent Submit Date	Phase Name	Request	Request Status	Grant Amount	Decision Date
VIEW	General Grant Application	1/31/2023 5:10 PM	General Grant Application	022971	Approved	\$50,000,000.00	
VIEW	ZF Testing	5/26/2023 1:53 PM	Progress Report	023222	Pending		
VIEW	General Grant Applicati	Submitted ▾					 Edit columns  Edit filters <div>Filter by keyword</div>
VIEW	General Grant Applicati	<div><input type="radio"/> Opportunity Name (GOapply Application) ▾</div>	<div>Most Recent Submit Date ▾</div>	<div>Phase Name (Current Phase) ▾</div>	<div>Request ▾</div>	<div>Request Status (Request) ▾</div>	<div>Grant Amount (Request) ▾</div> <div>Decision Date (Request) ▾</div>
VIEW	ZF Testing	General Grant Application	5/10/2023 4:10 PM	LOI Phase	023304	Pending	
VIEW	ZF Testing	General Grant Application	5/10/2023 3:53 PM	LOI Phase	023281	Pending	
VIEW	ZF Testing	General Grant Application	5/10/2023 3:53 PM	LOI Phase	023280	Pending	
VIEW	ZF Testing Scholarship	General Grant Application	5/10/2023 4:08 PM	LOI Phase	023288	Pending	
		General Grant Application	5/10/2023 4:08 PM	LOI Phase	023297	Pending	
		General Grant Application	5/10/2023 4:08 PM	LOI Phase	023289	Pending	
		General Grant Application	5/10/2023 4:09 PM	LOI Phase	023302	Pending	
		General Grant Application	5/10/2023 4:08 PM	LOI Phase	023295	Pending	
		General Grant Application	5/10/2023 4:05 PM	LOI Phase	023286	Approved	\$100.00 4/19/2023
		General Grant Application	5/10/2023 4:08 PM	LOI Phase	023293	Pending	

GOapply SUBMITTED APPLICATION PAGE

- Edit the “Submitted” system view in Power Apps
- Note: this view is the same for all users
 - If there is information in the view, it is visible to the applicant

THANK YOU

Presented By

Zoey Fife

Support Tech Tier III



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