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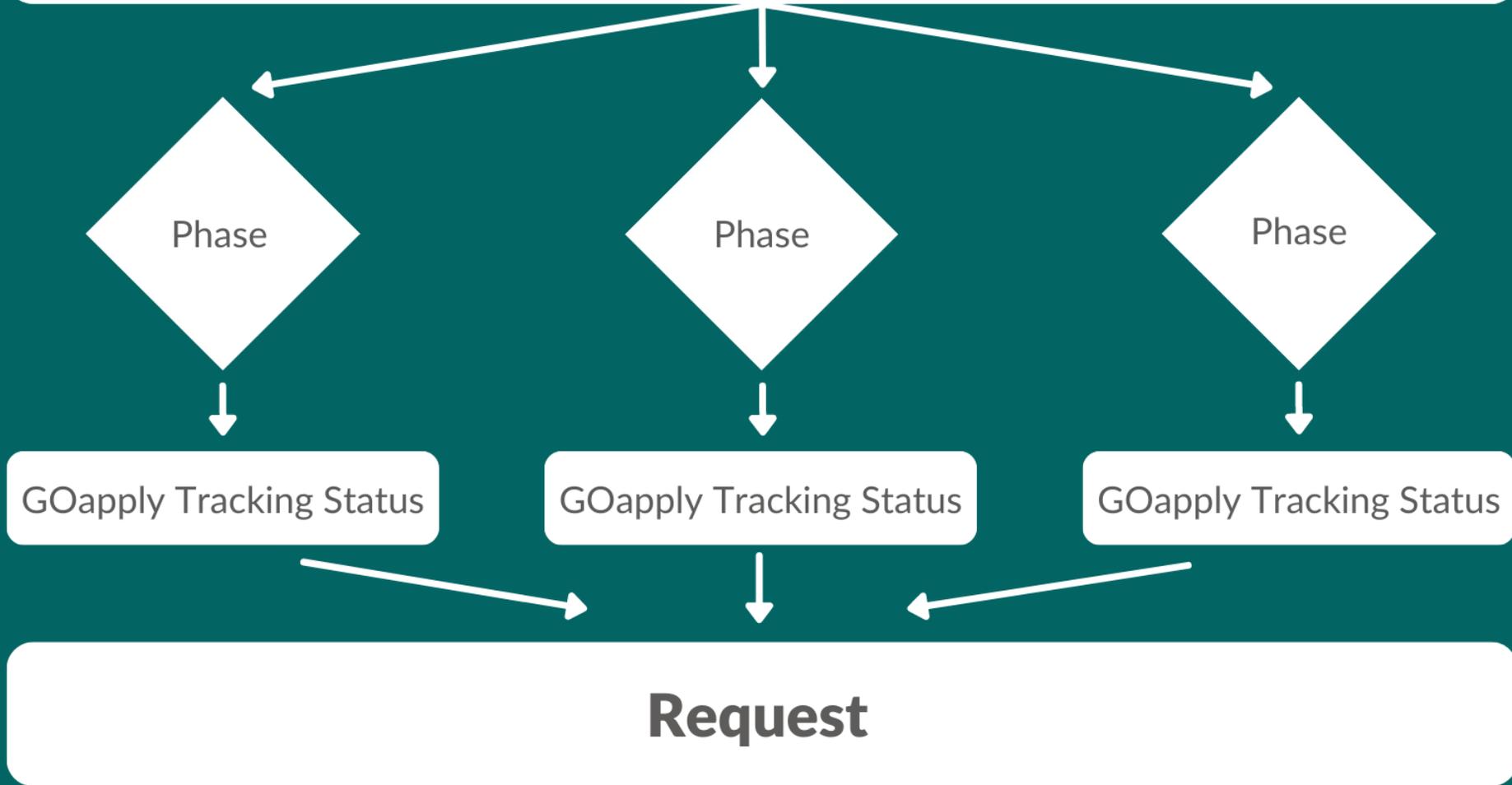
GRANT MOVEMENT IN GOapply AND CRM

PRESENTED BY
ZOEY FIFE

GOapply AND REQUEST

How do they interact?

GOapply Application/Opportunities



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 Status Tracking 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

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

[IN PROGRESS](#) [SUBMITTED](#)

	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 <input type="text" value="Filter by keyword"/>
VIEW	General Grant Applicati	<input type="radio"/> Opportunity Name (GOapply Application) ▼	<input type="radio"/> Most Recent Submit Date ▼	<input type="radio"/> Phase Name (Current Phase) ▼	<input type="radio"/> Request ▼	<input type="radio"/> Request Status (Request) ▼	<input type="radio"/> Grant Amount (Request) ▼ <input type="radio"/> Decision Date (Request) ▼	
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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