

December 2024 Product Update

Agenda

akoyaGO (non-accounting) – Bug Fixes & Enhancements

GOapply – Bug Fixes & Enhancements

akoyaGO with Accounting – Bug Fixes & Enhancements

Business Central – Bug Fixes & Enhancements

GOfund – Bug Fixes & Enhancements

GODonate – Enhancements

Where Can I Find Release-Related Resources?

<https://gosupport.powerappsportals.com>

- Release Notes
- Updated Documentation
- Recording of this Session



akoyaGO Bug Fixes + Enhancements

We have fixed Alternate Addresses in Contact. Alternate Addresses is responsive to the active dates and does not rely on Active Address being set.

We have fixed various bugs having to do with Canadian postal codes by fleshing out the logic we use to autofill city and province on Contact and Constituent.

The Grantee flag in the header of Constituent and Contact records will now be locked.

GOapply Bug Fixes



In response to a bug, email fields *in pre-mapped panels* will no longer validate email addresses. Some users were unable to submit phases due to unusual email addresses in the transcript and recommendation panels. However, the email input mask is still functional.



We have fixed a bug in which the Bulk Import User functionality was not setting the User's Status Reason to Approved. Users that are bulk imported will automatically be approved.



We have fixed a bug in which, when Review By date was blank in the Review Group record, the due date was being set to 24 hours ahead in the UI. Now, if Review By is blank, the due date shown to reviewers will also be blank.

GOapply Enhancements

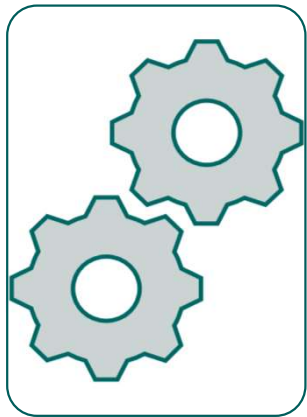


We have added an additional setting on GOapply Phases called Advance to Next Phase Automatically. If set to Yes, this field will advance submissions to the next phase immediately upon submit with no interference by foundation staff. This field will be set to No for all existing GOapply Phases upon release. For more information, please see the documentation.



Three new reports have been added – Scholarship, Scholarship with Weighted Score, and Scholarship Totals Report. These reports can be found in the Tools workspace of your akoyaGO CRM. Please see the GOapply Reviewer Admin Guide for more information.

GOapply Enhancements



A new setting has been added to GOapply Settings called Registration Charity Search where you can select US, Canada, Both or None to enable to disable the Tax ID search function in the registration process. Please see the GOapply Admin Guide for more information.

akoyaGO with Accounting – Bug Fixes



We have fixed a bug in which users were unable to select non-revenue accounts for gift payments.



We have fixed a bug in which the Cancel button on Gift Payment reversal confirmations was processing the reversal regardless.



We have fixed Alternate Addresses in Contact. Alternate Addresses is responsive to the active dates and does not rely on Active Address being set.



We have fixed various bugs having to do with Canadian postal codes by fleshing out the logic we use to autofill city and province on Contact and Constituent.



We have fixed a bug in which gifts that were imported into the GODO donate Transactions table were defaulting to a recurrence of monthly. The default for imported or manually created GODO donate Transactions will be no recurrence unless otherwise specified.

akoyaGO with Accounting – Enhancements



The Check No. field on Request and Gift Payments (including Quick Create) will now be limited to 20 characters so it is synonymous with the Document No. field in Business Central.



We have enhanced the Gift Fee form so that certain fields are conditionally visible based on Fee Type and Calculation.



We have enhanced Donor Opportunities such that a banner will appear on Donor when the system identifies a Donor Opportunity for that Donor.



Program Budgets can now be assigned at the Payment level. If assigned to a Request, new Payments will automatically be assigned to the same budget as the Request but can be modified to be applied to a different budget if appropriate.



Updates to a Fund's Fund Type, Endowed status, or Fund Class will now sync to Business Central and update all ledger entries for that fund for all time.

Business Central – Bug Fixes + Enhancements

We have fixed a bug in which, if a Fund was deleted from CRM, that fund's dimension was not Blocked in Business Central.

We have enhanced GL Memos such that if a GL Memo is altered after the payment has been sent to accounting, it will be updated in the ledger lines, as well.



Bug Fixes

We have fixed a bug in which all permissions for newly created Donor Portal Access fund connections were defaulting to No.



Enhancements

Disable Interfunds

- We have added a GOfund setting called Enable Interfund Recommendations that controls whether users have the option to create an interfund grant recommendation.

Customizable Recommendation Language

- Two new fields have been added to GOfund Settings – Customization for Organization Label and Customization for Established Fund Label wherein you can change the language that users see when creating a grant recommendation. See the GOfund Admin Guide for more information.

Comments on Recommend a Grant

- A new field is available on the recommend a grant form called Comments and will map to the Comments field on the Project tab of the Request.

Removed Fund Type from UI

- We have removed Fund Type from the Fund Summary page in the GOfund UI

GO donate Enhancements

If the Hero Image in GOdonate Settings does not have an image uploaded, the banner in GOdonate sites will default to the background color as determined in the theme settings.

Thank you!

Don't forget to clear you cache
Friday Morning to ensure you
receive all the updates!

akoyaGO