

EMPOWERED

2025 | USER CONFERENCE | DETROIT, MI

PROCESSING DONATIONS WITH GOdonate

PRESENTED BY

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akoyaGO

OBJECTIVES

- ✓ GOdonate Gift Basket (donation cart) feature
- ✓ Process and Manage Donations Efficiently
- ✓ Understand Transaction Workflows from Submission to Completion

GO donate




GOdonate GIFT BASKET – USER INTERFACE

- UI Donation Test 1
 - User is not logged in
 - Utilize gift basket
 - Remove item from basket
 - Anonymous designation
 - In Memory or Honor of designation

GOdonate GIFT BASKET – USER INTERFACE

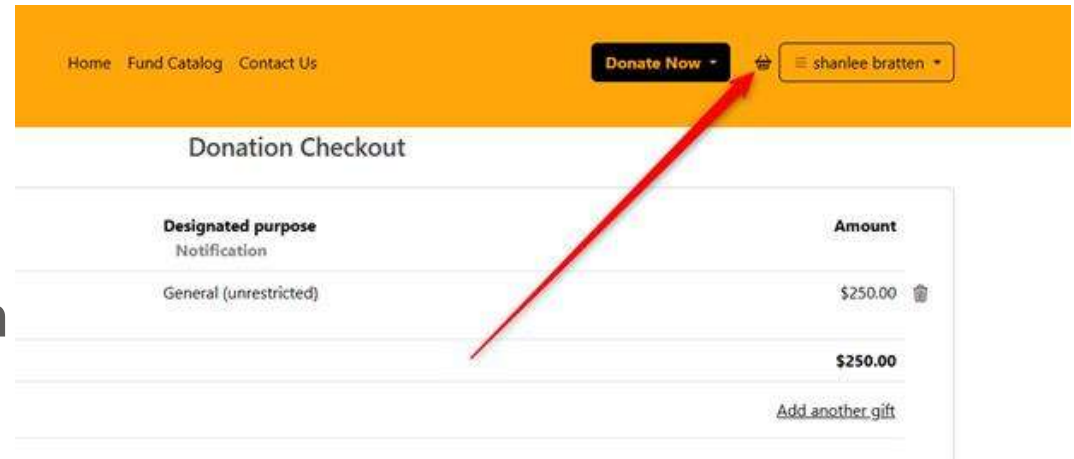
- UI Donation Test 1
 - With multiple gifts in the basket, the Total line is the sum of all gifts.

Donation Checkout

Fund	Designated purpose	Amount
Dedication	Notification	
Bill Berrier Scholarship Fund	General (unrestricted)	\$250.00 
The Ron J. and Susie W. Belvin Charitable Fund	General (unrestricted)	\$300.00 
Bowerbank Charitable Fund	General (unrestricted)	\$500.00 
Total		\$1,050.00
Add another gift		

GO donate GIFT BASKET – USER INTERFACE

- UI Donation Test 2
 - Logged in user
 - Choose donor record
 - Set up recurring donation
 - Utilize gift basket



THINKING OF IMPLEMENTING GOdonate?

- GOdonate uses Stripe as the online payment processing service.
- Foundations establish their own Stripe account, often with non-profit pricing.

Best Practice

Credit Cards are the one type of payment fully tested through Stripe/GOdonate. Check Stripe setting to disable other payment types.

Best Practice 2

Test GOdonate fully while in Stripe Test Mode utilizing fake cc numbers. When ready for Live Mode, replace live keys and complete 1 final test with a real cc.

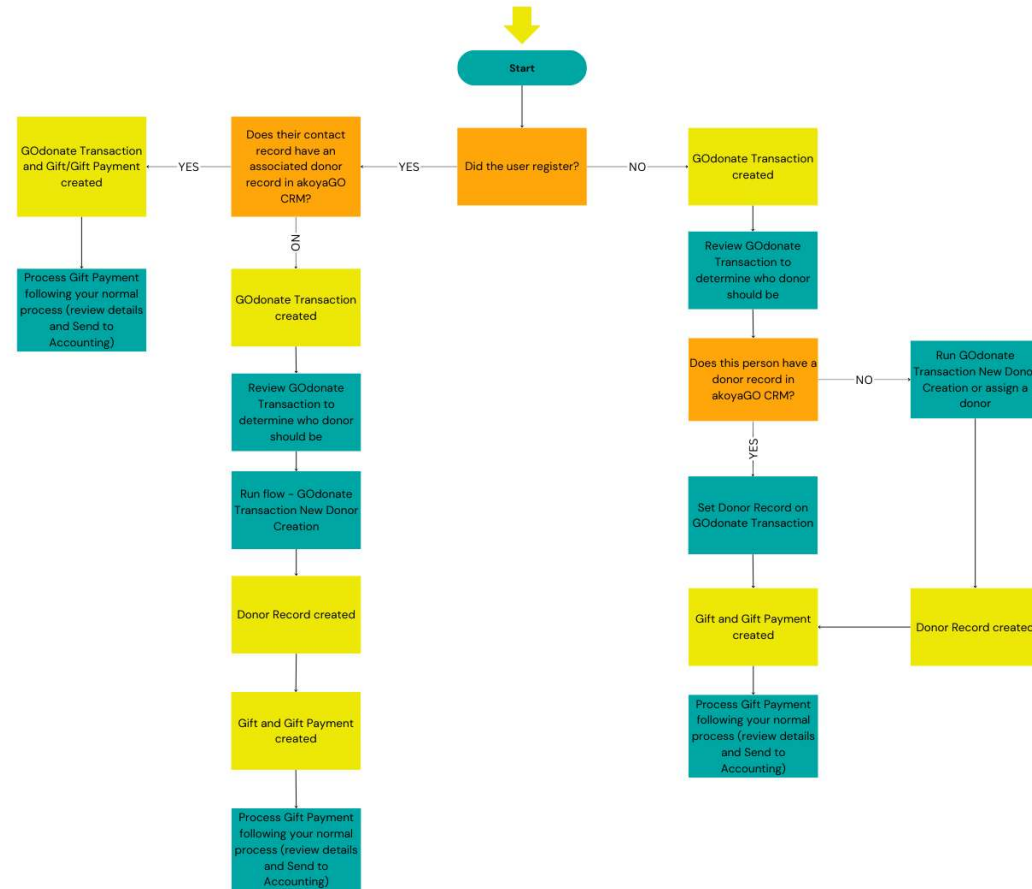
PAYMENT PROCESSING PROTECTIONS

- Protections from Stripe
- Protections from akoyaGO
- Ways you can protect your organization's incoming GOdonate transactions

Best Practice

Set a minimum donation amount to prevent common low value phishing transaction attempts and Enable Google ReCAPTCHA.

PROCESS GODO donate DONATIONS




GODonate TRANSACTIONS

- GODonate Transactions table is found in the Donor Management Area.
- The GODonate Transaction will be created in akoyaGO CRM as soon as the user puts a gift in their basket.

000010066 - Unsaved
GODonate Transaction

Transaction Details Fund Details Donor Details Internal Related ▾

Status Reason	Completed
Payment Status	succeeded
Donor	 Ms. Sarah Thompson ×
GODonate User	---
Anonymous	No
Total Amount	\$500.00
Fee Amount	\$45.30
Additional Donation for Fees	---
Other Fee Fund	---
Fee Fund Amount	---
Gift Purpose	50th Anniversary
Purpose	Designated Purpose

PROCESS GOfonate DONATIONS

- Quickly access Donor Details from the GOfonate transaction

000001101 - Saved
GOfonate Transaction

Completed Status Reason | 000001101 ID | Chelsey Johnson Donor | \$10.00 Total Amount

Transaction Details Fund Details **Donor Details** Internal Related

Show form fill assist

Donor First Name: Chelsey Donor Last Name: Johnson

Formal Default: Chelsey Johnson Formal Acknowledgement: Chelsey Johnson

Donor Email: chelsey@akoyago.com

Donor Type: Individual or Couple Donor Constituent: ... GOfonate User: Chelsey Johnson

PROCESS GOdonate DONATIONS

Payment Status

- **Succeeded:** The payment was fully processed successfully.
- **Pending_Stripe_Payment_Intent:** This status is a placeholder. GOdonate needs to notify Stripe of a payment before it can make a request for that payment, this is called Payment Intent. If you have GOdonate Transaction records that are stuck in this status, it means the user did not *submit* the donation.
- **Requires_Payment_Method:** The donation was not completed, The user abandoned the donation before entering a payment method.

Process GOn donate Donations

Status Reason:

- **Active:** Corresponds with `pending_stripe_payment_intent` payment status
- **Paid:** Corresponds with `succeeded` payment status
- **Waiting for Payment:** A payment method has not been entered, corresponds to `requires_payment_method` payment status
- **Denied:** Payment was not processed successfully, Stripe denied this payment.
- **Completed:** Everything has been completed, including gift record creation. A business rule in your system states that once the gift record is populated, the status reason will change to Completed.

PROCESS GOdonate DONATIONS

- Active GOdonate Transactions: System View on GOdonate Transaction table to view all in process or completed donations
- GOdonate Transactions for Review: System view on GOdonate Transactions table to view only donations that require staff intervention
 - A donor record must be assigned for transaction to be completed

Once the Donor is assigned, the **gift** record will populate a lookup field in the **GOdonate transaction** record. The **gift payment** is now ready for review and to send to accounting.

REFUND OF A GObonate DONATION – STRIPE

- To issue a refund through Stripe, you can do it easily from the **Stripe Dashboard**
 - Find the payment you want to refund
 - Choose whether to issue a full or partial refund and note the reason
 - Click Refund to complete the process
 - <https://docs.stripe.com/refunds>
- If not initiating refund through Stripe, a check can be issued instead.
 - There may be additional processing fees from Stripe.
 - A Journal entry would be needed to recognize these.

REFUND OF A GODO donate DONATION – akoyaGO

- When issuing a refund, there are steps you need to take in CRM also
 - Use the Refund option from reversals and adjustments. The option to include or exclude fees.
- There are two options to Refund:
 - Refund **including** fees (default)
 - Ex. \$1000 gift will refund the full \$1000 to donor
 - Refund **excluding** the fees
 - Gift refunded to donor minus Additional Donation Percentage for Fees
 - Ex. \$1000 gift – 3% fee = \$970 refunded back to donor

FEES RELATED TO GOdonate TRANSACTIONS

GOdonate Gift fee – 1 GOdonate gift fee should exist

- Option A: Charge the fee to the fund receiving the gift
- Option B: Charge the fee to an alternate fund such as operating fund

<input type="checkbox"/>	Fee ID ↑	Fee Name	Fee Type	Fee Calculation	Fund Paying the Fee
<input type="checkbox"/>	2%Fee	2% Admin Fee for Non-spendable funds	Administrative ...	Percent	Gift Fund
<input type="checkbox"/>	6%FEE	6% Admin Fee	Administrative ...	Percent	Gift Fund
<input checked="" type="checkbox"/>	GOdonate	GOdonate	Vendor Fee	Non-calculated	Gift Fund

FEES RELATED TO GOdonate TRANSACTIONS



1000 - Saved

GOdonate Settings · GOdonate Settings ▾

General Theme Fund Details Internal Related ▾

Utilize Interests for Fund Categories Yes

Enable Recurring Donations Yes

Donor Covered Fee Text Yes, I would like my donation to cover the processing fee of 3%.

Maximum Donation Amount \$100,000.00

Additional Donation Percentage For Fees 3.00

0000001142 - Saved

GOdonate Transaction

Transaction Details Fund Details Donor Details

Total Amount \$1,586.20

Fee Amount \$46.30

Additional Donation for Fees \$46.20

Other Fee Fund ---

Fee Fund Amount ---

GODonate WORKFLOWS

- GODonate Transaction New Donor Creation
- GODonate Daily Recurring Gift Check (flow and workflow): Ensure both are on prior to utilizing this feature
- **DEPRECATED** - GODonate Process Completed Donation: Now running via code, ensure workflow is off prior to launch

RECURRING GIFTS

GDonate

GDonate Transa...

Recurring Gifts

CRM

Constituents

Contacts

DM Donor Managem...

01007 - Saved

Recurring Gift

General GDonate Transactions Gifts Related

Donor	* Eric	Next Occurrence	* 7/9/2025
Frequency	* Monthly	End Date	
Total Amount	\$25.00	Created On	5/9/2025 11:58 AM
Additional Donation for Fees	\$0.00		

Fund 1	01495	Fund 1 Formal Name	The McMichael Le...	Amount 1	\$25.00
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RECURRING GIFTS

- Donors can manage their Recurring Gifts under Profile.
- To support the donor experience, a view can be modified – GOdonate Active Recurring Gift UI view. This is an out-of-the-box system view.

<input type="checkbox"/>	Recurring Gift Number ↑ ▾	Donor ▾	Frequency ▾	Total Amount ▾	Next Occurrence ▾	End Date ▾	Created On ▾
<input type="checkbox"/>	01007	Eric	Monthly	\$25.00	7/9/2025		5/9/2025 11:58 AM

Best Practice

The Recurring Gift record can be thought of as the umbrella under which all GOdonate Transactions, Gifts and Gift Payments can be found.

GOdonate EMAIL TEMPLATES

- Fund Management
 - GOfund Settings
 - Accounting Settin...
 - Departments
 - Functions
 - DT Accounts
 - Fund Fee Formulas
 - Spendable Allotm...
- Email Templates
- Grants Management
 - Committee Memb...

← | GOdonate Email Templates* ▾

🔍 Ask about data in this table.

- | <input type="checkbox"/> | Title ↑ ▾ |
|--------------------------|---|
| <input type="checkbox"/> | GOdonate - Canceled/Expired Recurring Donation |
| <input type="checkbox"/> | GOdonate - Notification of Status Reason Change |
| <input type="checkbox"/> | GOdonate - Onscreen payment confirmation |
| <input type="checkbox"/> | GOdonate - Recurring Donation Confirmation/Reminder |
| <input type="checkbox"/> | GOdonate - Reset Password |
| <input type="checkbox"/> | GOdonate Donation Confirmation Email |
| <input type="checkbox"/> | GOdonate Email Verification |

EMAILS FOR RECURRING DONATIONS FEATURE

- GOdonate: Canceled/Expired Recurring Donation
- GOdonate: Notification of Status Reason Change
- GOdonate: Recurring Donation Confirmation/Reminder

Best Practice

Please note, in GOdonate email templates, the curly brackets { } signify a hard coded field. You should not edit these fields.

The flat brackets [] signify fields that you can and should edit to your needs.

GOdonate DASHBOARD

← | GOdonate Transactions for review* | Focused view | Show Chart | + New | Delete | ↻

Ask about data in this table. | Payment Status: succeeded | Gift: I

<input type="checkbox"/>	ID ↓	Created On	GOdonate U...	Donor	Donor First Na...	Donor Last Na...	Formal Default
<input type="checkbox"/>	0000001153	7/1/2025 2:57...			Sarah	WP	Sarah WP
<input type="checkbox"/>	0000001151	6/24/2025 10:...			Claire	Nyenhuis	Claire Nyenhuis

Best Practice

Daily or weekly, revisit the GOdonate Dashboard to manage incoming records from GOdonate across multiple tables.

ROUTINE MAINTENANCE – SUGGESTED FREQUENCY

Daily or Weekly	GODonate Transactions for Review			
Monthly	Alert Banners	Email Templates & Signatures	Review GODonate Transactions Status Reason/Deactivate	
Quarterly	FAQs	Foundation Staff Contact	Review data in the Fund Details Fields	
Annually	General Site Verbiage	Eligible GODonate Enabled Funds list	Public Fund Image and Title Slug	Review Interests

ROUTINE MAINTENANCE - SUGGESTED FREQUENCY

Active Funds Enabled in GONotate - Externally Facing Fields*

Focused view Show Chart + New Generate Letters Delete

Ask about data in this table.

Status: Active

GONotate Enabled: Yes

<input type="checkbox"/>	GONotate Enabled	Fund Ty...	Fund Code	Fund Name	Purpose	Established	Endowed
<input type="checkbox"/>	Yes	Designat...	00044	McLucas Charitable Fund	"Here's to the crazy ones, the misfits, the rebels, ...	7/18/1990	False
<input type="checkbox"/>	Yes	Donor Ad...	01493	Jennifer Robbins Fund	Fund Details 1	3/10/2025	False
<input type="checkbox"/>	Yes	Donor Ad...	01476	Jackson Lee Urban Renewal	Fund Details 2		True
<input type="checkbox"/>	Yes	Donor Ad...	01478	Johnson Family Charitable F	Fund Details 3		True
<input type="checkbox"/>	Yes	Donor Ad...	01472	Tenbusch Fund	Fund Details 4		True
<input type="checkbox"/>	Yes	Donor Ad...	01488	Jen Tenn Environmental Fun	Fund Details 5		True
<input type="checkbox"/>	Yes	Donor Ad...	01491	Harrison Family Hope and E			False
<input type="checkbox"/>	Yes	Donor Ad...	01489	Becker Family Fund		1/20/2025	False

akoya_fundname

akoya_anonymity

akoya_established

akoya_endowed

akoya_purpose

RESOURCES

- [GOdonate Implementation – Suggested Learning Course](#)
- [GOdonate Admin Guide](#)
- [GOdonate User Experience](#)
- [Processing GOdonate Transactions](#)
- [Support Webinar – Processing Gifts from GOdonate](#)

- Additional resources exist in GOsupport on the topics of [Donors covering the fees](#), [Recurring Donations](#) and the [GOdonate Gift Basket](#).

THANK YOU

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