

Webinar Summary: GOfund Charts & Custom Grant Recommendations

Introduction & Participation

- Meghan welcomed attendees, explained the session would cover GOfund Charts and Custom Grant Recommendations, and encouraged questions via chat or unmuting. [0:08]
- Marni supported camera use for engagement but noted it was optional. [01:07]

GOfund Charts Feature Overview

Enabling Charts:

- Navigate to GOfund settings in the tools area.
- Locate the "Charts" tab (may require clicking three dots for more options).
- Toggle "Enable Charts" to "Yes" to activate the feature. [03:05]
- Optionally, customize the tab label (e.g., "Data Visualization"). [03:40]
- Save changes. [03:53]

System Charts Setup:

- Charts are based on system charts built in Power Apps.
- Supported tables: fund, request/payment, gift/gift payment. [04:17]
- Must have customizer permissions in Power Apps.
- In Power Apps, select the relevant table, click the charts icon under Data Experiences, and create or edit system charts. [05:15]
- Personal charts are not supported; only system charts can be used. [07:13]

Adding GOfund Charts:

- In GOfund settings, add a new chart.
- Define display order, type (number card or chart), and select the relevant view and column for aggregation (e.g., sum of payment amounts). [08:02]
- Preview charts for specific funds to check data rendering. [09:16]
- Publish charts individually or in bulk. [14:02]
- End users see the "Data Visualization" tab and can filter by reporting period or consolidate data across multiple funds. [14:33]

Technical Notes:

- Preview function may show errors for some users; fix is planned for next update. [09:41]
- Chart colors/fonts are not customizable; export/print is limited to browser print. [15:42]
- Hovering over charts reveals detailed data points. [16:14]
- Some chart types (donut, funnel, tag/word bubble) are not supported. [19:44]

- Charts are not assigned to specific funds; users see charts relevant to their own fund data. [36:49]
- Only certain tables are supported due to fund-linked permissions. [40:55]

3. Custom Grant Recommendation Forms

Accessing the Form Builder:

- In GOfund settings, scroll to the bottom to find form builder icons (uses SurveyJS). [21:35]
- Launch the form editor to add custom questions. [22:25]

Building the Form:

- Drag and drop fields from the "Request" section (standard or custom fields, except lookups).
- Edit labels and reorder questions as needed. [24:27]
- Advanced options: branching logic for conditional questions. [25:04]
- Save the form and flush site cache via Support Diagnostics if changes do not appear. [26:32]

Form Behavior:

- Custom questions appear above the standard file upload field.
- Standard fields (organization name, amount) cannot be removed due to system logic. [30:45]
- Unmapped questions do not transfer to the request record; mapped fields do. [28:57]
- Submitted recommendations generate a PDF with standard fields on page one and custom fields on subsequent pages. [31:45]
- To remove custom questions, delete the JSON file from the internal tab in GOfund settings. [33:32]
- Always back up JSON files before making changes. [34:09]

Permissions & Access:

- Grant recommendation access is set per user/fund connection, not by fund type. [28:42]
- Only administrators can access GOfund Charts and settings; team users need additional permissions. [34:38]

Q&A and Additional Notes

- Meghan and Marni answered questions about chart types, permissions, coding grants, and technical limitations. See Q&A document for more information.
- The next product update is scheduled for October; new features and fixes will be covered in the next webinar. [43:00]
- User forums are available for sharing ideas and product suggestions. [39:34]

Step-by-Step Technical Instructions (Key Features):

A. Enable GOfund Charts

1. Go to Tools > GOfund Settings.

2. Find the "Charts" tab.
3. Toggle "Enable Charts" to "Yes."
4. Optionally, set a custom label.
5. Save.

B. Create System Chart in Power Apps

1. Open Power Apps with customizer permissions.
2. Select the relevant table (e.g., payments).
3. Click the charts icon under Data Experiences.
4. Create or edit a system chart (define axes, type, label).
5. Save.

C. Add Chart to GOfund

1. In GOfund Settings, add a new chart.
2. Set display order, type, view, and aggregation.
3. Preview and publish.

D. Build Custom Grant Recommendation Form

1. In GOfund Settings, scroll to the bottom and launch the form builder.
2. Drag/drop fields, edit labels, set order.
3. Add branching logic if needed.
4. Save.
5. Flush site cache via Support Diagnostics if changes do not appear.

E. Remove Custom Form

1. Go to the internal tab in GOfund Settings.
2. Delete the JSON file to revert to standard fields.