Comprehensive Internal Release Notes

Release Date: 04.30.2026

This document provides a preview of items scheduled for our upcoming product update. As with previous releases, full client-facing release notes will be included in our official documentation. We are sharing this information early to help our more technical and "Power User" clients prepare for the upcoming changes. Anyone responsible for advanced product setup, integrations, or in-depth workflow customization is encouraged to review this material.

Top Highlights (What changed)

- **GOdonate checkout** is more editable: donors can update amount, fund, dedication, designated purpose, and notifications from the checkout list (with controlled drop-downs/modals).
- **GOdonate Gift Basket ('Shopping Cart')** experience is clearer and larger: "Gift Basket is full" messaging, item count/total value display, and increased basket capacity (6 → at least 10).
- **Recurring gifts** updated: weekly recurrence removed; start/end dates now display during GOdonate checkout; improved confirmation when deactivating recurring transactions.
- **Interfund processing** is safer and more predictable: related records are created only on "Send to Accounting," records lock after accounting state changes, and transfers/reversals are constrained to two G/L lines.
- **New Interfund reversal tools**: users can Void and Adjust Interfund Grants with guided prompts and consistent updates to linked Request/Gift/Payment records.
- **GOapply Org Profile improvements**: enforced profile completion gates for org flows, auto-mapped Applicant Panels from Org Profile, submission-time re-validation, and configurable Org Profile append to submitted PDFs.
- **Email and messaging improvements**: GOfund invitations are blocked (with banners/timeline notes) when contacts can't receive email; resend invitations supported with eligibility checks; friendlier external error pages and clearer in-app prompts.

Why it matters (Impact)

- Improves **end-user confidence and completion rates** by making checkout edits straightforward (less backtracking, fewer abandoned carts) and adding clearer basket state/messaging.
- Reduces **accidental or invalid transactions** through safer recurring gift behaviors (no weekly option, clearer start/end dates, confirmation on deactivation) and more controlled input patterns (drop-downs/modals instead of free text).
- Strengthens **accounting integrity** for Interfund processing by deferring child-record creation until "Send to Accounting," enforcing post-accounting locks, and ensuring predictable two-line G/L output in Business Central.
- Enables **clean recovery paths** when changes are needed after accounting by providing supported Void/Adjust tooling (instead of manual edits), reducing reconciliation issues and support escalations.
- Cuts **support friction and time-to-resolution** with clearer, actionable banners/timeline notes for blocked actions (e.g., invitation emails that cannot be sent; GOverify-exempt records), plus improved external-facing error pages.
- Improves **data quality and review readiness** in GOapply by enforcing Organization Profile completion when required, re-validating at submission, and optionally appending Org Profile details to submitted PDFs for reviewers.
- Gives foundations more **control and configurability** (e.g., suppressing one-time confirmation emails, controlling UI visibility like designated purpose/anonymous checkbox), helping align product behavior with client communication preferences.

Notable fixes & features

- **GOapply (Org Profile + forms)**
- Organization Profile completion gate is enforced for org flows; users are redirected to complete required fields before starting/submitting when org data is required (ID 14780).
  - Applicant Panel auto-maps from Org Profile and is refreshed on load; submission is re-validated to prevent submitting with missing/invalid org profile data (ID 14781).
  - Submitted PDFs can be configured to append Organization Profile as first/last page (or not at all), including "Pending Change" disclaimers when applicable (ID 14783).
  - Simple Form Builder fixes reduce data collisions by generating unique question names inside panels by default (ID 14603).

- **Interfund + Business Central (accounting safety)**
- Interfund child Request/Gift/Payment records are created only on "Send to Accounting" (not at Interfund creation), and Interfund Grant BPFs/workflows are deprecated to avoid legacy paths (IDs 12868, 12869, 14630).
  - Interfund Grants lock after accounting state changes (Payment Status contains data), preventing post-send edits via form or bulk edit (IDs 14234, 12848).
  - New supported reversal tooling: users can **Void** or **Adjust** Interfund Grants with guided prompts and consistent updates to linked records (IDs 14232, 14233).
  - Business Central posting is made deterministic (two G/L lines for transfers) and reversals surface clearer, correctable error handling (IDs 14209, 14683, 15290, 15291).

- **GOdonate checkout + gift basket**
- Donation checkout list supports in-place edits (amount, fund via drop-down, dedication/purpose/notifications via modals) to reduce errors and rework at checkout (ID 10248).
  - Shopping cart improvements: clearer "Gift Basket is full" messaging, visible item count/total value, and higher basket capacity (IDs 11036, 15007, 12262).
  - Recurring gift UX updates: weekly frequency removed; start/end dates shown during checkout; confirmation popup when deactivating recurring transactions (IDs 10462, 10468, 14855).

- **Messaging, email, and usability fixes**
- GOfund invitations: emails are blocked (with timeline notes + banners) when contacts can't receive email; users can resend invitations with eligibility checks (IDs 14218, 14219).
  - External-facing error pages are friendlier and more actionable (tenant-aware 404/403/500 handling with reference IDs, no stack traces) (ID 15047).
  - Quality-of-life fixes: consistent prompting when Payment Status Details indicates issues; clearer void instructions when a check number exists (IDs 14352, 14716).

Support Readiness – What to watch out for/Important information

- **"Missing email" reports:** check the **timeline** on the relevant "regarding" record (Contact / Donor Portal Connection / GOapply User / Status Tracking) for a note that the email was blocked (e.g., missing Email Address 1 or Email set to Do Not Allow), and confirm the underlying email data/preferences.
  - **GOfund invitations:** "Resend Invitation" is only available when the Connection is **Active**; resend attempts are blocked (with messaging + timeline note) when email is missing or disallowed.
  - **GOdonate checkout edits:** fund edits are **drop-down only** (no free text), and dedication/purpose/notification changes occur in **modals**—users may think fields are "missing" if they expect inline typing.
  - **Designated Purpose visibility:** if a user cannot see/edit designated purpose during checkout review, confirm whether **Enable Designated Giving** is disabled in GOdonate settings.
  - **Recurring gifts:** weekly recurrence is removed; if a client expects weekly, this is now by design. Start/end dates should display on checkout for recurring gifts—missing dates likely indicate a UI/rendering issue.

- **Gift Basket limits:** capacity increased (and messaging improved). If users see "Gift Basket is full," confirm the current basket item count and whether the tenant's configured limit differs from expectations.
- **Interfund "missing child records":** Request/Gift/Payment child records are created **only after** clicking **Send to Accounting**; "missing" before that is expected.
- **Interfund record locking:** if users cannot edit an Interfund Grant (or bulk edit payment fields), confirm whether **Payment Status contains data** / record was sent to accounting—locking is expected; remediation should use **Void** or **Adjust** where applicable.
- **Interfund GL expectations:** transfers/reversals should create **exactly two** G/L lines in Business Central. Extra lines, vendor/customer lines, or inconsistent reversal messaging should be treated as a defect/escalation candidate.
- **GOapply Org Profile gating:** if org users are "stuck" starting/submitting, confirm the opportunity/phase requires org data and that required Org Profile fields validate. Users may be redirected to Org Profile and must save before continuing.
- **Applicant Panel mapping:** org Applicant Panel fields are sourced from Org Profile and are read-only on the form; "can't edit applicant fields" is expected behavior.
- **Simple Form Builder/editor issues:** confirm the site is using SurveyJS v2.5+ (drag-and-drop freeze fix) and that expected controls (e.g., long-text) are present; treat list-formatting anomalies as potential HTML editor behavior differences.

Release summary and support focus

This release focuses on **reducing user friction** while improving **data integrity** across GOdonate, GOapply, GOfund, and Interfund/Business Central. Support will see more **guided user experiences** (banners, modals, validation, and clearer error pages) alongside stricter **rules-based behavior** (visibility toggles, eligibility checks, and post-accounting locking). The biggest support wins come from quickly identifying whether behavior is **expected by design** (settings/state-driven) versus a true defect requiring escalation.

Support focus: when troubleshooting, start by confirming the customer's **settings** (feature toggles) and the record's **state** (eligibility/locking) before treating a report as a bug.

- **GOdonate checkout + cart (expected UI patterns)**: edits may be in **drop-downs** and **modals** (not inline text), and some fields hide based on settings (e.g., **Designated Giving**). Confirm configuration before logging "missing field" issues.
- **Recurring gifts (behavior change)**: **weekly** recurrence is removed; start/end dates should display at checkout; deactivation now prompts for confirmation. Treat missing dates or broken confirmation flows as defects.
- **Interfund + Business Central (locking + deterministic posting)**: child records are created only after **Send to Accounting**, and Interfund Grants lock once accounting status is set. Void/Adjust are the supported correction paths; GL output should be **exactly two lines**—extra/missing lines should be escalated.
- **GOapply Org Profile (gating + mapping)**: org flows may redirect users to complete Org Profile requirements; Applicant Panel values are sourced from Org Profile and can be **read-only**. Validate required fields/pending-change locks when users report being "stuck."
- **Email + messaging (fewer "silent failures")**: invitation emails may be blocked when contacts can't receive email; users should see banners and timeline notes, and can resend when eligible. For external users, error pages should be friendlier and include reference IDs—missing IDs or stack traces should be escalated.

akoyaGO

Bug Fixes

7525 GOverify Exempt - alert users who try to run GOverify on exempt records
Tags: Bug, akoyaGO

What changed
A user-facing alert is added to prevent the GOverify command from running against records marked GOverify Exempt.

Client-impact summary

- When a user attempts to run the command on an exempt record, the operation is blocked.
- Support should expect the user to see a **banner or popup message** explaining that the command cannot be completed because the record is exempt.

What support should ask/check

- Confirm the record is categorized as **GOverify Exempt**.
- Confirm the user's attempted command matches the blocked action (GOverify run attempt).

Validation/QA notes

- Acceptance Criteria: Use a banner or popup message to alert the user that the command can't be completed because the record is GOverify Exempt.

12848 Bulk editing payments allows you to edit locked fields after sending to accounting
Tags: Bug, akoyaGO

What changed
Bulk editing no longer allows modification of locked fields after payments have been sent to accounting.

Original issue summary

- Clients could bulk select gift or request payment records from a view and edit fields that should be locked, even if the payment was already sent to accounting.

Expected behavior after fix

- Locked fields (example: Fund, Account, Payee, etc.) remain non-editable through bulk edit when the payment is sent to accounting.
- For payments where **payment status is blank**, bulk editing should still be permitted.

Fix/resolution summary

- The system enforces lock rules during bulk edit based on payment/accounting status.

Client support guidance
If a client attempts bulk edit and fields are now blocked:

- Ask whether the selected payments were sent to accounting.
- If payment status is blank, confirm that their edits are expected to succeed.

Validation/QA notes

- QA repro indicates fund changed even though payment was sent to accounting; this should be corrected.

14209 Ensure Interfund transfers only create two lines in the G/L

Tags: Bug, Business Central

What changed

Interfund transfers now produce exactly two G/L lines in Business Central when posted:

1. Amount deducted from gifting fund (debit/credit based on correct designation)
2. Amount credited/debited to receiving fund matching the transfer amount

No extra GL lines should be generated.

Client-impact summary

- Corrects prior behavior that created six GL lines.
- Improves financial reporting accuracy.

Support guidance

If clients see unexpected G/L lines:

- Validate the transfer was posted after this fix.
- Ensure transfer scenarios include different fund types/amounts where applicable.

Validation/QA notes

- QA indicates pass with link to the interfund grant record.
- Notes mention only the two highlight income/expense lines are created and vendor/customer lines will not be created.

14234 Interfund Grant Records cannot be modified after Send to Accounting

Tags: Bug, akoyaGO

What changed

Interfund Grant records with Payment Status containing data are now locked.

- All fields are locked on the form.
- A banner appears indicating the record cannot be modified.

Client-impact summary

- Prevents edits post-accounting sending/reversal.
- Reduces data integrity issues that might lead to incorrect or duplicated postings.

What support should ask/check

- Confirm Payment Status contains data (not blank/null).
- Confirm the user is viewing the Interfund Grant form.

Validation/QA notes

- QA indicates a banner appears when Status is Paid stating the record can’t be modified.

14352 Gift Payment Status Details not prompting user when <> (Success or Blank)
Tags: Bug, akoyaGO

What changed
Gift Payments now provide consistent prompting behavior when Payment Status Details is populated with values other than Success or blank.

Original issue summary

- Request Payments open an error dialog when Payment Status Details is not Success and has a value.
- Gift Payments did not show the message unless the Payment Status was overridden to error.

Fix/resolution summary

- Gift Payments should open a dialog/message when Payment Status Details contains a value different from Success/blank.

Validation/QA notes

- QA mentions an error dialog should appear after editing Payment Status Details and returning to the record.

14559 Pop up prompting updates to family connection records
Tags: Bug, akoyaGO

What changed
The address update confirmation popup is no longer shown unless the family connection role is actually Spouse.

Original issue summary

- When a family connection exists on a contact, updating the contact's address triggered a popup: "Would you also like to update the Spouse contact's address?"
- This popup appeared even when the role was not Spouse.

Fix/resolution summary

- Family connections that are not spouses do not show the spouse-address popup.

Validation/QA notes

- QA indicates setting a non-spouse family connection role and updating address does not prompt.

14576 CRM: Inconsistent UI in Gift Fees
Tags: Bug, akoyaGO

What changed
Two Gift Fee behaviors are corrected on Gift Payment screens:

1. Change event population for Gift Fee 2 matches Gift Fee 1.
2. Quick Add populates fee amounts.

Original issue summary

- Selecting Gift Fee 1 populates the amount field immediately.
- Selecting Gift Fee 2 did not populate the amount field.
- Quick Add did not populate amounts at all.

Fix/resolution summary

- Gift Fee amount fields update consistently when choosing fee 1 vs fee 2.
- Quick Add populates fee amounts as expected.

Validation/QA notes

- QA indicates fee amount updates immediately on change for the second fee and quick create behavior is correct.

14764 Update Covert to Interfund Grant workflow to make compatible with new process

Tags: Bug, akoyaGO

What changed

The Convert to Interfund workflow is updated to align with the new approach where interfund child records are created on Send to Accounting.

Updated workflow behavior

From a Request Payment where Payment Status is blank, running workflow “Convert to Interfund” now:

- Adds a note to the payment timeline stating it was converted to interfund
- Deactivates the payment
- Adds a note to the request timeline stating it was converted to interfund
- Marks request special request status as canceled

Support guidance

- When clients run conversion from a payment with blank Payment Status, they should see timeline notes and payment deactivation.

14954 eGrant.net Attachments tab shows on all Requests

Tags: Bug, akoyaGO

What changed

The eGrant.net Attachments tab no longer appears on Requests universally.

Original issue summary

- Attachments tab was visible on all Requests regardless of expected conditions.

Expected behavior

- eGrant.net Attachments tab never shows.

Validation/QA notes

- QA indicates tests with and without accounting.

14955 Script error on load of a new payment/requirement in full form

Tags: Bug, akoyaGO

What changed

A script error no longer occurs when loading a new payment/requirement using the full form (not quick create).

Client-impact summary

- Prevents page errors when selecting +New from Payments & Requirements.

Enhancements

12868 Do not create Interfund Request/Gift/Payments until record is sent to accounting

Tags: User Story, akoyaGO

What changed

Interfund related Request/Gift/Payment records are no longer created during initial Interfund Grant work.

Instead:

- Related Request/Gift/Payment records are created **only when the user clicks Send to Accounting**.
- The BPF is deprecated for Interfund Grant in favor of the full form or quick-create form.

Client-impact summary

- Before Send to Accounting: no child records should be created.
- After Send to Accounting: creation occurs at that time.

What support should ask/check

- Confirm whether the parent record is Interfund Grant.
- Confirm the user action: did they click **Send to Accounting**.

Validation/QA notes

- QA results indicate expected behavior before and after send to accounting, including a business process error observed at first and passing after fix.

12869 Deprecate Interfund Grant BPFs

Tags: User Story, akoyaGO

What changed

Business Process Flow (BPF) is removed for newly created Interfund Grant records.

Client-impact summary

- Newly created Interfund Grants no longer present the BPF interface.
- Interfund creation flows should use full form or quick-create patterns.

Validation/QA notes

- QA indicates:
  - deprecated on existing interfunds
  - new interfunds and interfund quick create pass

13399 If/Then logic in letter templates

Tags: User Story, akoyaGO

What changed

The Letter Templates feature supports if/then logic inside the Word template.

Client-impact summary

- Users can craft conditional content in their templates so output adapts to provided data.

What support should ask/check

- Confirm the user is editing via the Letter Templates feature.
- Confirm that the Word template includes if/then logic and is validated through generation.

14211 Deprecate Workflows related to old interfund functionality in akoyaGO solution

Tags: User Story, akoyaGO

What changed

Solution workflows tied to old interfund functionality are now labeled Deprecated and turned OFF.

Workflows listed to be deprecated and turned off:

- Convert to Interfund Grant
- Create Interfund Grant and Gift with payments
- Interfund Grant Send to Accounting
- Update Interfund Grant child records (Gift, Gift Payment, Request, Payment or Requirement)

Client-impact summary

- Old interfund workflow execution paths are disabled in favor of the new send-to-accounting record creation model.

What support should ask/check

- Confirm which workflow name the client sees and whether it is now prefixed with **Deprecated -**.

14212 Disable Workflows related to old interfund functionality in client sites

Tags: User Story, akoyaGO

What changed

A post-4/30 job is required on client environments to ensure deprecated old interfund workflows are disabled, including customized versions.

Client-impact summary

- Prevents unintended use of old interfund workflows when clients have customized workflow copies.

Support guidance

If a client reports old behavior still happening:

- confirm the job ran post-4/16.
- verify workflows are renamed with the Deprecated prefix and turned OFF.

Validation/QA notes

- QA results were not provided in the input.

14232 User can Void an Interfund Grant

Tags: User Story, Business Central

What changed

Users can void (reverse) an Interfund Grant when Payment Status is eligible.

Eligibility/guardrails:

- Void cannot run if Interfund Grant has **no Payment Status value (null)**.

Void flow requirements:

- Upon “Void” selection, user is prompted for **Reversal Date**.
- On confirmation:
  - Interfund Grant is reversed in GL Entries in Business Central as **two lines only**.
  - Interfund Grant Payment Status becomes Reversed.
  - Linked Request record is updated:
    - Original Grant set to 0
    - Request Status set to Denied
  - Linked Payment/Requirement is updated:
    - Payment Status set to Reversed
    - Reversal Amount populated
    - Reversal Date populated
  - Linked Gift record:
    - Gift Adjustment value entered
  - Linked Gift Payment record:
    - Gift Payment Status set to Reversed
    - Reversal Amount and Reversal Date populated

Client-impact summary

- Adds a safe, guided reversal workflow with proper accounting entry shape.
- Ensures related records are updated consistently (request, payment/requirement, gift, gift payment).

What support should ask/check

- Payment Status on the Interfund Grant (Paid/History are the scenario described in QA context).
- Whether a reversal date prompt was shown and provided.

Validation/QA notes

- QA includes a failure report suggesting the UI may have shown “success” messaging despite process failure; support should treat that as a potential messaging inconsistency to verify.

14233 User can adjust an Interfund Grant record

Tags: User Story, Business Central

What changed

Users can adjust an Interfund Grant via an “Adjust” command when Payment Status is eligible.

Eligibility/guardrails:

- Adjust cannot run if Interfund Grant has **no Payment Status value (null)**.

Adjust flow requirements:

- Upon “Adjust” selection, user is prompted for:
  - Adjustment Date
  - From Fund
  - To Fund
  - Gift Account
  - Gift Function
  - Grant Account
  - Grant Function
- On confirmation:
  - Original Interfund Grant is reversed in GL Entries (two lines only).

    - Original Interfund Grant Payment Status becomes Reversed.
    - Linked Request record updates:
        - Original Grant set to 0
        - Request Status set to Denied
    - Linked Payment/Requirement updates:
        - Payment Status set to Reversed
        - Reversal Amount populated
        - Reversal Date populated
    - Linked Gift/Gift Payment values updated with Gift Adjustment and reversed statuses.
    - A **new Interfund Grant record** is created using original plus adjusted values.
    - New Interfund Grant record is immediately sent to accounting.

Client-impact summary

- Supports controlled correction workflows by reversing and reissuing.
- Ensures "after adjustment" data is reflected in both CRM records and Business Central posting.

What support should ask/check

- Which fields the user changed during the adjust prompt.
- Whether the new Interfund Grant record was created and sent to accounting.

Validation/QA notes

- QA includes:
    - initial adjustment test failure tied to fund adjustment date today
    - success path including GL lines for original reversal and new record
    - tests for adjusting every other field except fund

14523 Codify workflow: Populate Gift Type based on Gift Quick Create

Tags: User Story, akoyaGO

What changed

Gift Quick Create logic is codified so clients do not need customizations.

Rules:

- When Gift Quick Create is used:
    - specified Payment Type is copied to the created Gift Payment payment type field
- If no matching Payment Type value is found in the Gift Payment table:
    - leave the field blank

Client-impact summary

- Standardizes behavior for gift payment creation.
- Prevents missing gift payment type due to client customizations.

Validation/QA notes

- QA indicates gift payment is populated when created via quick create.

14630 Deprecate Interfund Send to Accounting workflow

Tags: User Story, akoyaGO

What changed

The Interfund Send to Accounting workflow is deprecated and is no longer available on demand.

Client-impact summary

- Users should not find this workflow in the Flows menu.

Validation/QA notes

- QA indicates BPF is no longer on interfund grant form.

14720 Add grant amount awarded for current fiscal year as a field/column on constituent table
Tags: User Story, akoyaGO

What changed
Constituent table gains two new fields:

- Total Awarded This Year
- Total Awarded Last Year

Calculation rules
Total Awarded This Year

- Sum of Net Amount on request payments with:
  - Payment Status of Received or Paid (also History)
  - Posting Date in current calendar year
- Excludes payments in Error status

Total Awarded Last Year

- Same calculation but Posting Date in previous calendar year
- Excludes payments in Error status

Client-impact summary

- Supports reporting at constituent level with year-based award totals.

Validation/QA notes

- QA confirms fields present and totals calculate correctly and exclude reversed amounts.

14721 Deprecate Payee on Scheduled Distributions
Tags: User Story, akoyaGO

What changed

- Payee field marked Deprecated on Scheduled Distribution records.
- When Process Scheduled Distributions runs:
  - If Applicant Constituent has default payee, use it on Request/Payments.
  - If Applicant Constituent default payee is blank, use Applicant as Payee.

Client-impact summary

- Payee selection should align to constituent default payee logic.

Validation/QA notes

- QA includes an open concern about whether a popup asking to update payee is still expected when default payee exists.

14722 Add Spouse Prefix to the Contact Record

Tags: User Story, akoyaGO

What changed

- Field Spouse Prefix appears on the family connections tab of the contact form.
- Field is automatically updated based on other spouse fields when spouse connection changes.

Validation/QA notes

- QA indicates updated spouse with prefix populates when connection is created.

14761 Refactor how we set Request Status and Grant Amount

Tags: User Story, Business Central

What changed

Business rules/plugins are refactored so Request Status and Grant Amount are set deterministically.

Request Status logic:

- If Special Request Status contains data:
    - copy label value to Request Status
- Else if Grant Amount is null:
    - Request Status = Pending
- Else if Grant Amount > 0:
    - Request Status = Approved
- Else if Grant Amount = 0:
    - Request Status = Denied

Grant Amount rules:

- Not allowed below 0
- If Original Grant has data and Grant Amendment has data:
    - Grant Amount = Original + Amendment
- If Original Grant has data and Amendment is null:
    - Grant Amount = Original Grant

Support relevance

- Fixes order-of-operations issues where request status previously did not update appropriately.
- Ensures both real-time form updates and background updates (e.g., GOapply submissions) use consistent logic.

Validation/QA notes

- QA indicates all listed scenarios passed and real-time updates were tested in multiple contexts.

14857 CRM: Customer Defined Alternate Ids for External Integrations

Tags: User Story, akoyaGO

What changed

Alternate ID fields are added to core entities to support external integrations without schema changes.

Fields:

- CustomField1, CustomField2, CustomField3

Applies to:

- Constituent (CRM Dynamics 365 Account table)
- Contact
- Fund (Akoya_fund)

Constraints:

- Text length 50 minimum supports GUIDs.

Client-impact summary

- Foundations/integrations can map external IDs into system fields.
- Enables future reporting/logic opportunities (not expanded beyond described future usage).

14862 Create Internal Info tab for Funding Opportunities

Tags: User Story, akoyaGO

What changed

An Internal Info tab is added to the Funding Opportunities form including Created and Modified fields.

Validation/QA notes

- QA indicates accounting users see behavior as expected.

14865 Email template view for all GO products

Tags: User Story, akoyaGO

What changed

New system views added for Email Templates across products:

- GOapply Email Templates
- GOdonate Email Templates
- GOfund Email Templates

14889 Remove Letter Template lookup fields from request/gift/payment tables

Tags: User Story, akoyaGO

What changed

Letter Template lookup fields are removed from request/gift/payment tables because they are not functional.

Client-impact summary

- Removes non-functional UI/data fields.

15051 Change Default View for Scheduled Distributions

Tags: User Story, akoyaGO

What changed

The default system view for Scheduled Distributions is changed to:

- Active Scheduled Distributions

Client-impact summary

- Users viewing Scheduled Distributions will see active records by default.

Validation/QA notes

- QA indicates the Active Scheduled Distributions view is default.

15133 Implement Hangfire queue priority for monthly recalculate jobs

Tags: User Story, akoyaGO

What changed

Hangfire job processing is adjusted so monthly recalculate jobs run on a lower priority queue to avoid blocking other critical jobs.

Implementation details:

- Add a maintenance queue constant.
- Configure JobServer to poll queues in priority order: default then maintenance.
- Decorate specific recalculate jobs with [Queue("maintenance")]:
    - RecalculateDonorFieldsMasterJob
    - RecalculateFundFieldsMasterJob
    - RecalculateFundFieldsJob
    - RecalculateDonorFieldsJob

Expected outcome:

- During the monthly recalculate window, other jobs (e.g., GOapply submissions) continue processing without delay on the default queue.
- Queue taxonomy is audited so no stranded jobs exist.

Client-impact summary

- Improves system responsiveness during monthly recalculation peaks.

QA/validation notes

- No explicit test results included; this is a reliability-focused change.

15138 Update Interfund Grant Views

Tags: User Story, akoyaGO

What changed

Deprecated and disabled views:

- GOfund Pending Requests (Interfunds)
- Pending Interfunds Grants

Updated filter criteria for “Interfunds to Send to Accounting”:

- Status = Active
- AND (Payment Status does not contain data OR Payment Status = Error)

Client-impact summary

- Improves view correctness for sending interfund items to accounting based on updated payment status rules.

GOapply

Bug Fixes

12705 Add to Review Group button disappears after selecting Requested Scholarship records from a Scholarship

Tags: Bug, akoyaGO

What changed

A bug is fixed where the Add to Review Group button disappears after selecting multiple Requested Scholarship records on a Scholarship record.

Original issue summary

- Selecting multiple Requested Scholarship records from the Requested Scholarships tab caused the **Add to Review Group button to disappear**, preventing the user from easily adding scholarship-specific review groups.

Fix/resolution summary

- The button behavior is corrected so users can add Requested Scholarships to a Review Group directly from the Scholarship record.

Client support guidance

- If a user reports the button missing after selections, confirm they are using the Requested Scholarships tab under a Scholarship record and attempt the add flow again after the fix deployment.

Validation/QA notes

- QA indicates:
    - accounting admin sees option present
    - accounting team user and non-accounting variants pass

12706 Add to Review Group button missing from Scholarship (non-accounting) form

Tags: Bug, akoyaGO

What changed

A bug is addressed where non-accounting users did not see the Add to Review Group button on the Requested Scholarships tab of a Scholarship record.

Original issue summary

- On the non-accounting Scholarship form, the Requested Scholarships tab lacked the Add to Review Group button.

Fix/resolution summary

- Button availability is aligned so the command is available for both non-accounting and accounting Scholarship forms.

Client support guidance

- For non-accounting users unable to add Requested Scholarships to review groups, verify after deployment that the button is present on the Requested Scholarships tab.

Validation/QA notes

- QA notes indicate this is the same bug as 12705 (as questioned) and repro steps revolve around button presence across subgrid states.

14007 Re-opening scholarship automatch form shouldn't require user to de-select/re-select scholarships

Tags: Bug, GOapply

What changed

When a scholarship automatch application is reopened from Submitted back to Scholarship In Progress:

- previously selected scholarships remain selected.
- users do not need to de-select/re-select.
- Submit All remains available for previously selected scholarships.

The reopen fix applies only while the parent status tracking record is in Scholarship In Progress.

Client-impact summary

- Reduces friction in reopen flows.
- Prevents loss of selections that previously made “Submit All” unusable (in the described workaround scenario).

What support should ask/check

- Confirm the parent status tracking record state is **Scholarship In Progress**.
- Confirm the application is being reopened from **Submitted**.

Validation/QA notes

- Automated tests passed 7/7.
- Manual reopen-flow scenarios were not run in the provided session.

14541 Award Agreement phase stuck in Scholarship in Progress

Tags: Bug, GOapply

What changed

The submission process now skips an intermediate step under specific award agreement conditions.

Original issue summary

- If automatch on the opportunity is set to yes and phase type does not equal application:
    - status tracking submission process should skip the scholarship in progress step.

Fix/resolution summary

- Award agreement flow no longer leaves the system in a stuck Scholarship in Progress state as described.

Validation/QA notes

- QA indicates steps include creating an opportunity with application phase then award agreement phase, completing and advancing, and checking status tracking behavior.

14549 Reviewer PDF-Viewer displaying GUID after choice in drop-down field

Tags: Bug, GOapply

What changed
Reviewer PDF generation no longer displays a selected dropdown value followed by ::GUID.

Original issue summary

- A premapped Program field exists.
- If a target view is not chosen:
    - in reviewer PDF, the question displays chosen option text followed by ::GUID.

Fix/resolution summary

- In the reviewer PDF, the Program question should display only the chosen option text.

Client support guidance

- If a reviewer sees ::GUID appended to dropdown values, confirm the phase/question setup involved premapped Program and target view selection rules.

Validation/QA notes

- QA indicates guid no longer visible in pdf after added premapped Program field, selected option, and generating reviewer output.

14552 Country is not locked when registering with Existing Constituent
Tags: Bug, GOapply

What changed
During GOapply registration with an existing constituent:

- all address fields are locked
- Country is now locked as well

Original issue summary

- Country remained editable while other address fields were locked.

Fix/resolution summary

- Country is locked, aligning to the “all address fields locked” expectation.

Validation/QA notes

- QA indicates all org fields locked including country.

14567 HTML Editor inserts Return After Numbered List Instead of Tab
Tags: Bug, GOapply

What changed
In the HTML editor on the GOapply Settings form:

- numbered list formatting is corrected so the editor keeps the text aligned after “1.”
- the editor no longer inserts a carriage return immediately after the number in editor output

Original issue summary

- After typing a numbered list item (e.g., “1. ”), the editor inserted a line break instead of continuing the list line.

Fix/resolution summary

- Standard list formatting behavior is restored so numbered list text remains on the same line as the list number.

Validation/QA notes

- QA indicates numbered list renders correctly in application and in PDF.

14603 Default Question Names Within Panels Not Setting Correctly in Simple Form Builder

Tags: Bug, GOapply

What changed

Simple Form Builder now assigns unique question names to questions within panels by default.

Original issue summary

- Questions within panels were assigned non-unique names (e.g., First_Name in both panels).
- This caused values to overwrite upon submission.

Fix/resolution summary

- Default naming includes the panel name as prefix to prevent collisions (e.g., Primary_Contact_First_Name pattern).

Client support guidance

If clients report overlapping values between panels:

- verify whether the affected editor is using the corrected unique naming behavior.

Validation/QA notes

- QA describes reproduction with two panels pointing to the same table and verifying address fields are not overwritten.

14607 Scholarship Name not appearing in header of requestedscholarship pdf

Tags: Bug, GOapply

What changed

Reviewer PDFs for Requested Scholarship now populate the Scholarship Name in the header.

Original issue summary

- In RequestedScholarship PDF, the scholarship name was not populating.
- It appeared as: “Scholarship: ” (blank).

Validation/QA notes

- QA states via steps that the reviewer PDF should display the scholarship name header.

14606 Regenerated submission PDFs do not refresh read-only Dataverse-mapped fields

Tags: Bug, GOapply

What changed
Regenerate submission PDFs now updates mapped fields in the PDF based on latest CRM values, including read-only Dataverse-mapped fields.

Original issue summary

- After post-submission CRM changes (e.g., approved org profile enhancements), regeneration did not refresh certain mapped values in the submitted PDF.
- Current workaround required impersonation and resubmission through the UI.

Fix/resolution summary

- Using resubmit tool and/or reprocess mapping plus regenerate PDF tools updates the PDF file with updated mapped question values.

Validation/QA notes

- QA indicates the updated program on request did not update on PDF in the failure repro; this is the target fix.

14878 Currency question name automatically appends period when used in branching logic (Advanced Form Builder)
Tags: Bug, GOapply

What changed
A bug is fixed where adding a Currency type question to branching logic caused the displayed question name to gain a trailing period (.) and broke logic evaluation.

Original issue summary

- In question properties: name did not include the period.
- In branching logic: the question name displayed with trailing period.
- Branching logic failed to trigger as expected due to name mismatch.

Fix/resolution summary

- The question name remains unchanged when referenced in branching logic.
- Branching logic evaluates correctly.

Validation/QA notes

- QA indicates branching logic works when currency question is referenced.

Enhancements

12279 Add scholarship lookup or subgrid of scholarships to Fund form
Tags: User Story, akoyaGO

What changed
The Fund form gains scholarship-related UI elements:

- A **Scholarships tab**
- A Fund Form Tab showing:
  - list of **Active Scholarships**
  - a grid of **Scholarship Payments** request activity
- The request activity tab now uses **one subgrid** of payments instead of four separate grids.

Client-impact summary

Fund authors/accounting users can:

- View active scholarships linked to a fund.
- View scholarship payment request activity through a consolidated subgrid.

What support should ask/check

- Confirm the Fund form is showing the new Scholarships tab.
- Confirm scholarships exist and are active so they appear in the tab.
- Confirm the request activity area shows a single payments subgrid.

Validation/QA notes

- QA indicates accounting testing and accounting team user passes.

14404 Investigate Email fields on GOapply User table

Tags: User Story, GOapply

What changed

This is an investigation task to identify how email fields are used so that tooltips can be written or fields deprecated if necessary.

Fields under investigation:

- akoya_email
- akoya_applicantemail

Client-impact summary

- No direct end-user behavior change is explicitly specified, but outcomes may lead to clarification or deprecation.

14422 Remove ValueName attribute from form editor

Tags: User Story, GOapply

What changed

In GOmanager form editors covered by this story:

- question-level valueName is not shown in the property grid
- it cannot be set through the form builder UI
- when saved, any existing question-level valueName is removed from the saved definition upon reopen

Supported behavior that must not regress:

- lookup/autocomplete behavior depending on nested configuration such as choicesByUrl.valueName continues working.

Client-impact summary

- Form builders will no longer expose valueName at the question level.
- Existing forms that previously stored valueName will have that value removed after being saved in affected editors.

Validation/QA notes

- QA indicates failure for advanced form builder visibility: value name should not be visible there either.

14780 Enforce Org Profile Completion Gate for Organization Flows

Tags: User Story, GOapply

What changed

For organization-data-required application flows, the system enforces that the Organization Profile is complete before starting or submitting phases.

Behavior:

- Determine organization context needed for the flow.
- When flow requires organization data:
  - check Organization Profile completeness per configured required fields/validation.
- If incomplete:
  - redirect to a dedicated Organization Profile page (not modal/dialog).
- Re-check after saving:
  - if still invalid, remain in completion flow with clear messaging.
- Block progress until complete.

Trigger points:

- start of a new phase
- submission of a phase

Canceled criteria note:

- acceptance criteria items 2, 3, 4, and 5 from the prior version were canceled on March 12, 2026.

Client-impact summary

- Org users must complete required Org Profile fields before progressing.
- Individual users and non-org opportunities are not blocked by this gating.

Support guidance for common confusion

Based on QA observations, some flows may redirect to org profile but allow “Continue” bypass behavior depending on test conditions—support should:

- verify whether the client is an org user and the opportunity type requires org data.
- confirm which panels are conditionally visible and whether they carry required fields.

Validation/QA notes

- QA includes multiple scenario validations across Simple Form Builder and Advanced Form Builder.

14781 Auto-map Applicant Panel from Org Profile & Submission Re-validation

Tags: User Story, GOapply

What changed

For GOapply forms containing an Applicant Panel on Organization opportunities:

- The applicant panel is automatically mapped to the Parent Constituent of the logged-in org user.
- Mapping is non-configurable by foundation/client.
- Applicant Panel values are refreshed on each load from Org Profile (source of truth).

- Mapped fields are read-only on the application form.

Submission-time re-validation:

- Before submission for Organization opportunities, the system re-verifies:
  - Parent Constituent exists
  - Organization Profile exists and is still valid/complete
- If invalid/missing:
  - submission is blocked with a clear error instructing correction first.

No impact:

- Non-Organization opportunities proceed without org profile validation.

Client-impact summary

- Prevents drift between org profile and application submission.
- Reduces re-entry and submission errors caused by outdated org data.

Validation/QA notes

- QA notes indicate users can potentially bypass redirection by clicking Continue; support should validate current deployed behavior in client environments.

14782 Pending Change Request Disclaimers & Editing Lock

Tags: User Story, GOapply

What changed

When an Organization Profile has a pending change request:

- A disclaimer banner appears on the Organization Profile page showing data is under review.
- Org Profile editing is locked for ALL users under the same Parent Constituent.
- The disclaimer displays proposed changes.
- The banner is non-blocking for application progress; users can still submit applications/phases.
- Editing lock is released once the change request is approved/resolved.

Client-impact summary

- Clear visibility into proposed-but-not-approved org profile values.
- Prevents concurrent edits that could cause conflicts.

Validation/QA notes

- QA indicates banner appears after submitted change request and users can still submit phases when change request is approved; unlock occurs appropriately.

14783 PDF Generation with Configurable Org Profile Append

Tags: User Story, GOapply

What changed

Per Phase configuration controls whether the Org Profile is appended to the submitted application PDF and whether it appears first or last.

Configuration field:

- Append Organization Profile to Submitted PDF
- Options:

- Do not append to PDF
    - Add Org Profile as first page
    - Add Org Profile as last page
- Default for new phases: Add Org Profile as first page
- Fallback when blank/unset: treat as Do not append to PDF

Behavior:

- Most current data included at submission time.
- If appended and pending change request exists:
    - include disclaimer and render proposed/requested changes as a separate Pending Changes section below current values.
- If Do not append:
    - no Org Profile pages and no disclaimer.

Applicant vs reviewer PDF:

- Applicant PDF includes Org Profile when append enabled.
- Reviewer PDF includes Org Profile when append enabled unless the review is anonymous.

Validation alignment:

- Submission-time validation still enforced: valid Parent Constituent and valid/complete Org Profile required at submission when Applicant Panel is used.

Client-impact summary

- Foundations can tailor PDF review packets for their review process.

Validation/QA notes

- QA includes tests around null behavior, first/last page behavior, and reviewer group visibility.

14953 Blacklist Email Addresses

Tags: User Story, GOapply

What changed

A global blacklist is introduced for email addresses to prevent spam applicants.

Notes:

- The list is stated as global, not tenant-specific.
- Recaptcha is already enabled; blacklist provides additional filtering.

Client-impact summary

- Blacklisted emails are blocked from receiving GOdonate records.

15010 Alphabetize list of review groups when using Add to Review Group button

Tags: User Story, GOapply

What changed

When using Add to Review Group on GOapply, the list of review groups is alphabetized.

Client-impact summary

- Easier findability for admins when selecting a review group.

15248 Display Organization Profile each time a new form is started
Tags: User Story, GOapply

What changed
Organization Profile is displayed when a new application form starts from Opportunities depending on phase status.

Rules:

- When new form starts from Opportunities and current phase status is not started:
  - organization profile is displayed
- When new form starts from In Progress (either advanced or invited directly):
  - organization profile is displayed
- Organization profile header shows message: Please review the following information and confirm it is correct. Then, save the form to continue.

Client-impact summary

- Org users always see org profile confirmation at new form start.

Validation/QA notes

- QA notes include: modifying an in-progress application does not re-display org profile (per expected behavior).

Business Central

Bug Fixes

14529 Voiding a Refund Record Does Not Clear Reversal Info on Gift Payments
Tags: Bug, akoyaGO

What changed
When a refund record is voided, reversal information should be removed from the original gift payment.

Original issue summary

- A gift payment had a refund processed but not paid.
- After voiding the refund record:
  - the original gift payment still contained reversal information indicating reversal type Refund and a date.

Fix/resolution summary

- Void of a refund record clears reversal information on the original gift payment.
- Refund record retains reversed status per normal behavior.

Client support guidance
If clients see reversal data remaining after void:

- validate that the refund record is voided (not another refund state)
- confirm fix deployment.

Validation/QA notes

- QA instructions explicitly describe expected observation on original payment not showing reversed data.

14708 Amount Inc Tax does not update on Purchase invoice
Tags: Bug, Business Central

What changed
Business Central purchase invoice totals should update in line entry experiences.

Original issue summary

- The invoice line panel uses amount excl tax, but the total field is amount incl tax.
- Total incl tax did not update immediately while entering lines; it updated only after closing or posting.

Expected behavior

- Total incl tax should update immediately as lines are added.

Validation/QA notes

- QA indicates total incl tax updates immediately after QA fix.

14714 Prevent reversal in GL Entries of RPMT and GPMT items sent from CRM
Tags: Bug, Business Central

What changed
Manual reversal of G/L entries is prevented for items that came from CRM.

Client-impact summary

- Avoids unintended reversals that can conflict with CRM-to-accounting posting rules.

14716 Updating void pop up when payment status = paid and there is a check number
Tags: Bug, Business Central

What changed
The void flow messaging is improved when:

- payment status is Paid
- and a check number exists

Original issue summary
Users previously could be unclear about the correct sequence:

- void payment in Check Ledger first, then void expense on the original screen.

Expected behavior
Popup message instructs users clearly:

- Payment has been made. Click the button below to void the payment in the Check Ledger. Then, return to this screen to void the expense.

Validation/QA notes

- Acceptance criteria defines the messaging behavior.

14683 Bad error message on Interfund Reversal
Tags: Bug, akoyaGO

What changed
Interfund reversal errors are corrected so the reversal process completes successfully.

Original issue summary

- Users received an error message: The specified field does not exist in Microsoft Dynamics 365
- The referenced field logical name mismatch indicated Reversal Date logical name was incorrect in solution.

Fix/resolution summary

- Correct the logical naming so reversal can proceed.

Validation/QA notes

- QA indicates could not be reproduced internally; resolution intent is to ensure reversal goes through.

14892 Create Payments action from Vendor Ledger does not fill Applies-to Doc. No. in Payment Journal

Tags: Bug, Business Central

What changed

The Payment Journal lines created from Vendor Ledger entries now include Applies-to Doc. No. values.

Original issue summary

- Clicking Create Payments from Vendor Ledger left Applies-to Doc No blank.
- This interfered with check print options (combine by vendor and document no.).

Fix/resolution summary

- Created payment lines now have Applies-to Doc No populated, matching behavior when Suggest Vendor Payments is used.

Validation/QA notes

- QA includes that check printing error is addressed by the updated field population.

15291 Interfund Adjustment gets stuck when we fail to post created interfund

Tags: Bug, Business Central

What changed

This addresses a scenario where after reversing the original interfund, failing to post the newly created interfund leaves adjustment "stuck."

Original issue summary

- Fail occurs prior to posting the new created interfund.
- System should allow recovery (post after fix) or users can create a new interfund.

Expected user messaging

- Update payment status message example: Interfund created from adjustment. Must be posted.

Validation/QA notes

- QA states it will be unable to reproduce; requires developer to create custom build and simulate posting errors.

15290 If Error occurs in posting Interfund and we repost - the error message does not clear on reversal

Tags: Bug, Business Central

What changed

Error messages shown after failed interfund reversal posting should clear correctly when the user reposts.

Original issue summary

- Reversed an interfund after it previously voided.
- Error message did not clear.

Validation approach (QA instructions)

- Set Auto/Post to false in BC.
- Attempt to reverse interfund until it fails.
- Turn autopost on and reverse again.
- Confirm the error message no longer displays.

Notes

- QA indicates inability to reproduce via standard means; this story is described as a “one line fix.”

Enhancements

12336 Add Fund Name to JIA preview

Tags: User Story, akoyaGO

What changed

In the JIA preview, Fund Name is displayed next to the Fund number.

Client-impact summary

- Preview clarity improves for reviewers and admins preparing JIA exports.

What support should ask/check

- Confirm the JIA preview screen is the one impacted.
- Validate that the fund name column appears in the preview.

14328 BC Clients have check reports in Legacy Custom Report Layouts - build instructions on how to migrate to new system

Tags: User Story, Business Central

What changed

A supporting migration approach is required for Business Central customers who have check reports configured using legacy custom report layouts.

Problem this addresses

- Statement printing logic expects the new report layouts; legacy custom report layouts cause confusion and ambiguity for support teams.

Required support deliverables

Support should have:

- A strategy to customize legacy layouts and mark them **Obsolete** with a message indicating use report layouts.
- Guidance to use the **migrate** button.
- A document describing how to migrate custom report layouts to report layouts.

Notes for client communications

- Help clients understand "where to update" by pointing them directly to the migrate pathway.

14439 Complete Async work on Send to Accounting. Changed to support Sync

Tags: User Story, akoyaGO

What changed

Additional work is needed to complete async portions of Send to Accounting and to add support tools for it, while ensuring sync support.

Planned outcomes described include:

- menu items in the batch area
- copy batch and rerun failures (e.g., batch of 1000 with 100 failures)

Concurrency concerns (support focus)

- Concurrency issues to watch out for include:
  - UpdateCRMInterfundStatus
  - TODO writeback on async tasks

Client-impact summary

- Operational reliability for send-to-accounting retries and failure handling.

14487 Data migration process for pledges

Tags: User Story, Business Central

What changed

A pledge migration process is validated with accounting outputs.

Expected validation criteria:

- Customer Ledger shows GPMT record in the amount of the Accrual Balance from CRM
- GL Entries created net zero (debits equal credits by account and fund)

Support guidance

For pledge migration verification:

- follow QA instructions: create a Pledge with IS AR Conversion set to True and send to accounting.

Validation/QA notes

- QA indicates receivable account is present in both lines and there is a Customer Ledger entry.

14760 Interfund Testing: Special BC Build with Exceptions at key spots in Reversal Process

Tags: User Story, Business Central

What changed

An issue/ticket for testing infrastructure that introduces exceptions at key spots in the reversal process.

Test scenarios described

- Interfund Adjustment reversal succeeds, then error during processing of new interfund (partial posting)
- Interfund Void: error during posting with correct handling and status behavior questions

Support implications

- Enhances confidence that errors are correctly handled and surfaced to users.

15139 JIA Changes - April Release
Tags: User Story, akoyaGO

What changed
Multiple UI and testing support updates:

- New JIA support for editing GL Accounts added to UI.
- Reset button added if user closes browser after clicking Calculate Allocations.
- Button renamed: Apply Allocations to Calculate.
- akoya Balance Review renamed to akoyaGO JIA Journal.
- QA instruction indicates a new feature but not to be mentioned in external notes.

Client-impact summary

- Admins can edit GL accounts within JIA flow.
- Reset button provides recovery for interrupted calculation sessions.

GOfund

Bug Fixes

14907 Proposed address update on grant rec does not populate on scheduled distribution
Tags: Bug, akoyaGO

What changed
Proposed address updates submitted on recurring grant scheduled distribution now populate:

- scheduled distribution fields
- the PDF stored in documents
- related request record

Original issue summary

- Proposed address changes were not visible on Scheduled Distribution and not visible in the stored PDF.
- Not present on related Request.

Validation/QA notes

- QA indicates that after repro, the proposed address is still present on Request and submitted PDF.

14970 Grant Amount should show commas on grant recommendation form
Tags: Bug, GOfund

What changed
Grant Amount in grant recommendations displays commas for values greater than 999.

Client-impact summary

- Improves readability and user confirmation.

Validation/QA notes

- QA notes: commas appear after the user clicks out of the field.
- PDF comma behavior is explicitly outside scope.

Enhancements

14218 Prevent GOfund donor portal invitation emails from sending when the Contact cannot receive email and surface clear, actionable notifications [CpD]
Tags: User Story, GOfund

What changed
GOfund donor portal invitation emails are blocked when the associated Contact is missing an email address or has email disallowed.

The system additionally:

- writes a timeline note on the Contact (Note/Annotation)
- shows a contextual Go Verify–style banner on both Contact and donor portal Connection records
- ensures banners disappear after underlying data is corrected

Original problem and new behavior
AC1 — Email address missing

- If Contact has an active donor portal connection and no Email Address 1:
    - no invitation email is sent
    - timeline note is added with: The GOfund invitation email cannot be sent to this Contact. Reason: Contact does not contain a valid Email Address 1 value.
    - banner appears on Contact and donor portal Connection with the reason

AC2 — Email disallowed

- If Contact Preferences for Email is Do Not Allow:
    - no email is sent
    - timeline note explains email was blocked
    - banner appears with dynamic reason “Contact Preferences for Email is set to Do Not Allow”.

AC3 — Contact can receive email

- If valid email exists and preferences allow email:
    - invitation sends normally
    - no banner displays

Client-impact summary

- Fewer failed email deliveries.
- Stronger troubleshooting support through:
    - exact timeline notes
    - explicit banners on the relevant records

What support should ask/check

- Whether the donor portal connection is **active**.
- Whether Email Address 1 is present and valid.
- Whether Contact Preferences for Email is set to **Do Not Allow**.

Validation/QA notes

- QA scenarios include banner appearance on create, banner dismissal when connection is deactivated, and saving errors when email is missing (as observed behavior).

14219 Resend GOfund Invitation Email

Tags: User Story, GOfund

What changed

Users can manually resend a donor portal invitation from a Donor Portal Connection record, with strict eligibility checks and logging.

A “Resend Invitation” command:

- appears only when the Connection is Active
- is hidden when connection is inactive or pending

Eligibility rules

- Block resend if:
  - Contact has no Email Address 1
  - Contact Preferences for Email is Do Not Allow
- If resend is blocked:
  - no email is sent
  - user sees a message explaining missing/restricted reason
  - a timeline note is written documenting the blocked attempt

Successful resend behavior

If email is present and allowed:

- system sends invitation email
- timeline note is added with resend documentation

Client-impact summary

- Users are empowered to re-invite without rerunning backend processes.
- Prevents invalid resend attempts.

Validation/QA notes

- QA indicates resend success path and block conditions for missing email and Do Not Allow.

14967 Option to remove anonymous checkbox on grant recommendation

Tags: User Story, GOfund

What changed

A GO fund settings option allows disabling the anonymous checkbox for grant recommendations.

Client-impact summary

- When disabled, the anonymous checkbox is not shown on the grant recommendation form.

Validation/QA notes

- QA indicates new setting present and default Yes; when disabled, checkbox not on form.

14968 Add helper text option for all standard grant recommendation fields
Tags: User Story, GOfund

What changed
Helper text can be configured in GO fund settings for standard grant recommendation fields:

- Organization Name
- Amount
- File Upload
- Grant Type
- Comments
- Recommendation Note

Client-impact summary

- Foundation administrators can provide guidance to reduce data entry errors.

Validation/QA notes

- QA asked about how many characters are supported.

14969 Offer option to remove Grant Recommendation and Grant History boxes from Home page
Tags: User Story, GOfund

What changed
Configuration option allows foundations to remove Grant Recommendation and Grant History boxes from the top of the GOfund Home page, since they already exist in the navigation menu.

Client-impact summary

- Reduced home page clutter and fewer support questions.

Validation/QA notes

- QA covers combinations of boxes enabled/disabled.

14971 Shopping Cart offers option for user to recommend another grant
Tags: User Story, GOfund

What changed
A shopping cart UI enhancement adds a bottom-of-page option:

- Recommend another grant

When selected:

- user begins on the grant recommendation page and chooses the fund they are granting from as the first step.

Client-impact summary

- Faster workflows for users making multiple recommendations.

Validation/QA notes

- QA indicates recommend another grant works and multiple requests/interfunds can be created from cart.

15047 Error pages/messages should be prettier since they are shown to external users

Tags: User Story, GOfund

What changed

GOfund error experiences are improved to be more user-friendly for external users.

Included scenarios and expectations:

- 404: friendly 404 page with tenant-aware navigation and a working path back home, no stack trace/internal details.
- 403/access denied: friendly experience, no technical details, no login looping.
- 500 unhandled: standalone when tenant context unavailable, no stack trace/exception message, includes support/reference identifiers.
- Catch-all non-success statuses: generic error page remains user friendly.
- Tenant not found: no broken navigation/theme dependencies and no technical exception details.

Common requirements:

- Accessibility and keyboard navigation usable.
- Clear landmarks/headings, contrast maintained, responsive rendering.
- Reference IDs visible:
    - HttpContext.TraceIdentifier
    - Activity.Current?.Id

Client-impact summary

- Less alarming error messaging.
- Action-oriented guidance for users.

Validation/QA notes

- QA indicates multiple diag tests and accessibility/responsive validation.

GOdonate

Enhancements

10248 Allow edit of donations in checkout page list

Tags: User Story, GOdonate

What changed

The donation checkout experience now allows users to edit donation details directly in the checkout page list, including:

- Donation **Amount**
- **Fund** selection
- **Dedication**
- **Designated Purpose**
- **Notifications**

Edits are implemented using controlled UI patterns:

- The **Fund column** uses a **drop-down** (no free-text entry).
- Dedication/purpose/notification edits occur in **modals** that replicate the relevant sections of the fund form.

Client-impact summary

On the donation checkout page, users can:

- Click edit controls for each donation in the list.
- Modify amount and related customization fields.

Support representatives should emphasize that:

- Fund edits are restricted to eligible funds in the drop-down.
- Certain edits happen inside context-specific modals (not inline free-text fields).

Details to support troubleshooting

Fund selection

- Uses a drop-down that displays available funds eligible for donation.
- Free-text entry is prohibited.

Dedication edits

- Triggered from the Dedication edit control.
- Opens a modal replicating the fund form's dedication section.

Designated Purpose and Notifications edits

- Each opens its own modal replicating the respective fund form sections.

Amount edits

- Available during the edit flow for the selected donation.

QA/verification notes

- QA results indicate required flows passed, including:
    - Edit icon/symbol next to each donation in cart
    - Amount edit
    - Dedication modal editing
    - Fund selection drop-down (no free-text)
    - Purpose/notification modal editing

Support follow-ups (when to involve product/dev)

If a client reports unexpected inability to edit:

- Verify whether the specific edit types are available given their configuration (e.g., designated giving availability noted in QA).
- Confirm the UI is using modal-based editing rather than attempting to enter free-text.

10462 Ability to Remove Weekly Recurring Gifts

Tags: User Story, GOdonate

What changed

Weekly recurrence is removed from recurring gift configuration.

This applies to:

- Creating a recurring gift: **Weekly** is no longer an available recurrence option.
- Editing an existing recurring gift: users cannot change the recurrence frequency to **Weekly**.

Client-impact summary

- Users will not be able to set recurrence to weekly when creating or editing recurring gifts.
- Existing functionality for other recurrence options remains unaffected.

What support should ask/check

- Confirm the user is attempting to select or switch to **Weekly**.
- If an edit fails, confirm the attempt is specifically to set frequency to weekly.

Validation/QA notes

- QA indicates “no longer an option” for both godonate and gofund scenarios (per tests listed).

10467 Hide Designated Purpose on checkout page if disabled in GOdonate settings

Tags: User Story, GOdonate

What changed

When the GOdonate setting Enable Designated Giving is turned off, the Designated Purpose column is hidden on the transaction review page (just before checkout).

Client-impact summary

- Clients with designated giving disabled will not see the designated purpose field/column during checkout review.
- Users should not be prompted to enter designated purpose information when disabled.

What support should ask/check

- Verify the GOdonate setting **Enable Designated Giving** is off.
- Confirm the user is viewing the correct page stage (transaction review “just before checkout”).

Validation/QA notes

- QA confirms that when enabled is off, it is not shown on the transaction review page.

11036 Show "Gift Basket is full" message on GOdonate Shopping Cart page

Tags: User Story, GOdonate

What changed

GOdonate now provides clear messaging on the Shopping Cart page when the basket reaches capacity.

Client-impact summary

- Users can see the number of donations currently in the basket without navigating to checkout.
- When full, the UI shows a clear indicator/message:
  - **Gift Basket is full**

What support should ask/check

- Confirm the client is on the Shopping Cart page (not checkout).
- Confirm the number of donations in the basket hits the configured limit for their tenant/program.

Validation/QA notes

- No explicit QA results were provided in the input; support should confirm behavior aligns with the basket capacity.

10468 Recurring gift end date and start date on GOdonate UI

Tags: User Story, GOdonate

What changed

The GOdonate UI now includes recurring gift start date and end date on the checkout page.

Client-impact summary

- Users can view the recurrence date boundaries during checkout.
- Support should treat missing/incorrect date displays as UI defects tied to checkout rendering.

What support should ask/check

- Confirm the user is on the checkout page where recurring gift details are shown.
- Confirm the gift is recurring.

Validation/QA notes

- QA results were not explicitly provided in the input; support should rely on the acceptance criteria behavior.

12262 Increase GOdonate Basket (Shopping Cart) from 6 to 12 donations

Tags: User Story, GOdonate

What changed

The GOdonate shopping cart basket capacity increases from 6 to 12 donations.

Client-impact summary

- Clients can add more donations into the basket before being blocked.
- The basket should show the number of items visible as part of the cart UI.

What support should ask/check

- Confirm whether the client is attempting to add more than the maximum.
- Verify cart visibility and checkout behavior when the limit is reached.

Validation/QA notes

- QA indicates:
    - total out of twelve is visible in gift basket
    - adding more than 12 gifts is not allowed
    - checkout with 12 gifts is allowed

14851 Option to disable OOB confirmation emails for GOdonate Transactions

Tags: User Story, GOdonate

What changed

Foundations can disable automated one-time donation confirmation emails.

Configuration:

- New boolean field: DisableAutomatedConfirmationEmail on akoya_godonatesettings

- Default: false
- GOfund already has akoya_gofundsettings.DisableAutomatedConfirmationEmail; this change aligns suppression for GOfund one-time confirmation emails.

Scope explicitly excluded:

- Recurring gift confirmation emails are not affected.

Client-impact summary

- One-time donation confirmation emails can be suppressed based on foundation settings.
- Existing foundations with no setting change continue receiving emails as before.

Validation/QA notes

- QA confirms:
  - emails sent when disable is null/false
  - emails not sent when disable is true

14854 Ability to Change Fund Catalog Listing Order

Tags: User Story, GOdonate

What changed

Fund catalog listing order can be changed.

Related behaviors:

- Donors can look up funds by fundholder's name.
- Fund catalog shows fund name but is searchable by formal fund name keyword search.
- Formal Fund Name displays in the catalog.

Client-impact summary

- Improved searching and ordering for donor fund selection.

14855 Make On-Screen Pop-Up to tell user on Deactivate of Recurring GOdonate Transaction

Tags: User Story, GOdonate

What changed

When a GOdonate user deactivates a recurring gift:

- a confirmation popup appears asking the user to confirm they are sure.

Client-impact summary

- Reduces accidental deactivation.

15007 Show number of items in basket and total $ value

Tags: User Story, GOdonate

What changed

The gift basket icon now displays:

- total number of items
- total $ value

Client-impact summary

- Users can see basket status without opening the basket.

GOapply Organization Profile Redo Feature Overview

Description

This feature aims to enhance the Organization Profile functionality by ensuring data reuse, enforcing completion when necessary, and allowing updates outside of application cycles. It includes mapping rules for Applicant Panels and submission-time re-validation to ensure the integrity of organization data. For a more comprehensive internal resource, reference: GOapply Organization Profile Enhancements Comprehensive Overview 04.30.2026 .docx

Key Features

- **Reuse Organization Profile Data**: Prevents re-entry of existing data in applications.
- **Update Capability**: Allows authorized users to update profiles independently of applications.
- **Completion Enforcement**: Ensures profiles are complete before proceeding with relevant flows.
- **Applicant Panel Mapping**: Automatically maps panels to the Parent Constituent of the logged-in user.
- **PDF Generation**: Configurable to include the Organization Profile in submissions.

Detailed Breakdown

1. **Reuse Organization Profile Data**:
   - Applicants must not re-enter data that already exists in the Organization Profile when using an Applicant Panel.
   - Applicant Panel values in applications are replaced with the most current Organization Profile values.
2. **Org Profile Updates**:
   - Authorized users can update the Organization Profile at any time, independent of an application or grant cycle.
3. **Completion Enforcement**:
   - For flows requiring organization data, the Organization Profile must be complete and valid before proceeding.
   - If incomplete, users are redirected to the Organization Profile page to complete it, with a re-check loop until valid.
4. **Applicant Panel Mapping Rules**:
   - Applicant Panels are automatically mapped to the Parent Constituent of the logged-in organization user.
   - This mapping is fixed and cannot be modified by the foundation/client.
5. **Submission-time Re-validation**:
   - Before submission, the system re-verifies the validity of the Parent Constituent and Organization Profile.
   - Submission is blocked if the profile is invalid, with clear error instructions.
6. **Pending Change Requests**:
   - Displays a disclaimer banner if there is a pending change request, locking editing for users under the same Parent Constituent.
   - Pending change requests do not block application progress.

7. **PDF Generation**:
    - On submission, the application PDF is generated with settings to append the Organization Profile as the first page, last page, or not at all.
    - Anonymous reviewer PDFs exclude the Organization Profile on the submitted PDF that is shown to Reviewers

What changed
The Payment Journal lines created from Vendor Ledger entries now include Applies-to Doc. No. values.

Original issue summary
- Clicking Create Payments from Vendor Ledger left Applies-to Doc No blank.
- This interfered with check print options (combine by vendor and document no.).

Fix/resolution summary
- Created payment lines now have Applies-to Doc No populated, matching behavior when Suggest Vendor Payments is used.

Validation/QA notes
- QA includes that check printing error is addressed by the updated field population.

Proposed address update on grant rec does not populate on scheduled distribution

What changed
Proposed address updates submitted on recurring grant scheduled distribution now populate:

- scheduled distribution fields
- the PDF stored in documents
- related request record

Original issue summary
- Proposed address changes were not visible on Scheduled Distribution and not visible in the stored PDF.
- Not present on related Request.

Validation/QA notes
- QA indicates that after repro, the proposed address is still present on Request and submitted PDF.

Interfund Reversals Feature Overview

The akoyaGO Interfund functionality governs how Request, Gift, and Payment records are created and processed when an Interfund Grant is used. The feature set is designed to prevent unintended execution of downstream processing for interfund scenarios, ensure that only supported workflows run, and guarantee that accounting output is predictable and testable. For a more comprehensive internal resource, reference: Interfund Reversals enhancement 04.30.2026.docx

- **Record creation is intentionally deferred until "Send to Accounting"**: Interfund-related downstream records (Request/Gift/Gift Payment/Payment or Requirement, depending on the client's process model) are **not** created at Interfund Grant creation time; they are generated only when the user explicitly clicks **Send to Accounting** on the Interfund Grant.
  - Support check: if a client "can't find the Request/Payment yet," confirm whether **Send to Accounting** has been executed.
  - UX expectation: newly created Interfund Grants do not use the legacy BPF-driven creation path, so "missing steps" often reflect the modern flow.
- **GOverify exclusion is mandatory for interfund scenarios**: GOverify must **not** execute for interfund Request/Payment scenarios, even if clients are accustomed to verification behavior elsewhere.
  - Support check: if verification outcomes appear for an interfund-related Request/Payment, treat it as unexpected and validate whether GOverify is being invoked contrary to the rule.
- **Immutability after accounting stage is enforced via Payment Status**: once **Payment Status contains data** (i.e., post-accounting submission/processing), the Interfund Grant becomes non-editable (fields lock) to preserve accounting integrity.
  - Expected resolution path for changes: use supported **Void (Reverse)** or **Adjust** commands instead of editing locked fields.
- **Void (Reverse) and Adjust are gated by Payment Status and create deterministic accounting effects**: both actions require **Payment Status ≠ null** and prompt the user for date/context inputs; they reverse the original posting in Business Central and update linked CRM records consistently.
  - **Void**: prompts for **Reversal Date**; sets interfund payment status to **Reversed**; populates reversal amount/date and updates linked Request/Gift/Gift Payment/Payment statuses accordingly.
  - **Adjust**: prompts for adjustment inputs (Adjustment Date, From/To Fund, Gift/Grant Account & Function); reverses the original and creates a **new Interfund Grant** using adjusted values, which is then **sent to accounting**.
- **Business Central posting is constrained to exactly two G/L lines**: interfund transfers (and reversal steps generated by Void/Adjust) must create **exactly two** general ledger lines representing the transfer between funds.
  - No vendor/customer lines should be created.
  - If clients see extra or missing lines, the scenario likely violates this deterministic requirement and should be investigated as a defect/configuration issue.
- **Interfund Quick Create applies Accounting Settings defaults but allows override**: on form load/save, key fields are defaulted from **Accounting Settings** (grant account/function and gift account/function,

with gift account selection depending on endowed vs. non-endowed gift type), while users can manually change values before saving.

  - Missing defaults behavior: if an Accounting Settings default is absent, the corresponding field remains blank and should surface guidance (tooltip/validation) indicating the missing setting.
  - Additional defaulting: Grant Title can auto-populate on save when blank (based on Grantee or Gift Fund formal name); Donor defaults to Payor when Donor is empty.

- **Legacy interfund workflows/BPFs are deprecated and must be disabled for consistency**: Interfund Creation and Interfund Reversal BPFs are deprecated; solution and client environments should be scanned so legacy workflows are renamed with a *Deprecated* - prefix and turned off (including customized variants) to prevent old automation paths from running.
  - Support signal: if clients observe “old” behavior, treat it as an indicator that legacy workflows may still be enabled or custom logic is interfering.

Work items (User Stories and Bug Tickets)

Tagging work items: Add a short line directly under each work item heading in this format: **Tags: [Type]**, **[Product]**.
Type must be **Bug** or **User Story**.
Product must be one of: **akoyaGO**, **GOapply**, **GOfund**, **GOdonate**, **Business Central**.