



Version 4.5.11 Release Notes

May 27, 2020

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Introduction

This document describes the changes made to release 4.5.10 of Sumac to create release 4.5.11.

Important Fixes

Silent Partner includes bug fixes and experience optimizations as a standard part of every Sumac release. These minor changes are not normally documented in the release notes, but this release has some fixes to issues that affected many users. We've included the "Important Fixes" section to highlight those changes.

Resolved Issue with Bulk Editing User Types in Contact Records

When using the Bulk Edit feature to update User Type for Contacts, some users identified an error. Instead of the Contact records being updated with the selected User Type, the User Type would be blank. Sumac 4.5.11 has fixed this issue. If you go to Contacts and select Special Editing > Bulk Edit > Other field(s), you can successfully edit User Types for Contacts in bulk.

Integration with Gmail for Bulk Emails

New Feature!

In this release of Sumac, we have introduced direct integration with Gmail for sending emails! Instead of using an internal SMTP server, Sumac now has improved integration allowing you to use your Gmail account for sending emails. This makes configuring your database to send emails much simpler.

If you want to use Gmail as your SMTP server for sending emails through Sumac, this improved integration allows you to Log In with Google to validate your credentials and connect your Gmail account to Sumac. Once this is configured, Sumac will use your Gmail account for all emails it sends.

The screenshot shows a configuration window titled "Office" with a close button (X) in the top right corner. The window contains several input fields and a section for email settings. The "Email Settings" section is highlighted with a red border. Below the "Email Settings" section, there is a "Segments" section with two checkboxes labeled "1" and "2". At the bottom right of the window, there are "OK" and "Cancel" buttons.

Organization Name	Demonstration Charity
Visible Name	Default Office
Street A	123 Street st.
Street B	
City	Toronto
State	Ontario
Country	Canada
Postal Code	
Phone	
Extension	
Fax	
Web Site	
Charity Number	
	<input checked="" type="checkbox"/> Default Office
Time Zone	Eastern
Email Settings	<input type="radio"/> SMTP <input checked="" type="radio"/> Gmail
Google Account	<input type="text"/> <input type="button" value="Log In Google"/> <input type="button" value="Clear Google Account"/>
Outgoing Email: Display Name	Sumac Demo Database

Segments
 1 2

OK Cancel

Simplified Mail Merge

In this release of Sumac, we combined the Quick Mail Merge and Mail Merge functions into a single function to make mailing to your contacts simpler. All the same functionality is there, just bundled into one interface.

When you go into Contacts and select Mailing, you will now see a single option for “Mail Merge.” When you click “Mail Merge,” all the Mail Merge Template Options are available.

The screenshot shows a dialog box titled "Mail Merge Template Options" with a close button (X) in the top right corner. The dialog is divided into several sections:

- Contacts list:** Section 1, "Contacts to report about". It has a radio button for "All" (selected) and a radio button for "IDs File" with an adjacent text input field. There are "Choose" and "Open" buttons to the right.
- Same As Last Time:** Section 2, "Do you want to run the same mail merge as the last time?". It has two radio buttons: "Run the same mail merge" and "Run a different mail merge" (selected).
- Basic Approach:** Section 3, "How do you want to specify a template?". It has two radio buttons: "Choose the same template for every record" (selected) and "Use language specific templates".
- By Language:** Section 4, "Choose which languages you want to use templates for (Note: all others will use default template)". It contains a grid of checkboxes for Arabic, Cantonese, Chaldean, English, Ethiopian, French, Italian, and Mandarin.
- Choose Template:** Section 4, "Choose templates". It has a "Default" label and a text input field, with a "Choose" button to the right.

At the bottom right of the dialog are "OK" and "Cancel" buttons.

New Add and View Own User Permissions

New Feature!

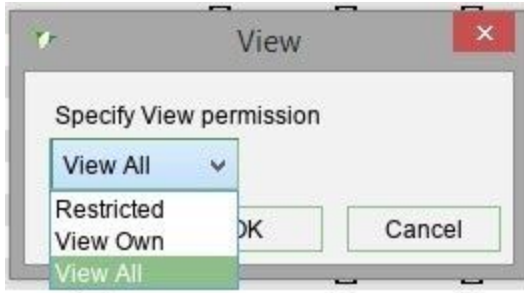
In this release of Sumac, we added two new user permissions: View Own, and Add.

You can now set a user's permission to view only entries they created. Alternatively, you can set a user's permission to be able to Add new entries, but prevent that user's ability to Edit entries later. These permissions can be set for any user in your database.

To put these new permissions in place, your Sumac Administrator can go to Utilities > Sumac Administration > Users. Double-click a user's name, and click "View All" to change the user's

permission to "Restricted," "View Own," or "View All." You can also combine this with the "Add," "Edit," and "Delete" permissions.

Data or Commands	View	Add	Edit	Delete	Special
Auctions	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Campaigns	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Collections	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
Communications	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Contacts	View All	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Course Registrations	View All	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Disbursements	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
Donations	View All	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Events	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Forms	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Funding Programs and Requests	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Grant Applications	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Invoices	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Job Openings	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
Ledger Entries	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Pledges	View All	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Payments	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Report Distributors	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
Sales	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Proposals	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	



Note, this new feature is available for only the Contacts, Donations, Pledges, and Course Registrations areas of Sumac. Future releases will introduce these new user permissions for other areas of Sumac as well.