Version 4.5.5 Release Notes

2019-07-17

Contents

Introduction

This document describes the changes made to release 4.5.4 of Sumac to create release 4.5.5

Automatic Pledge Processing

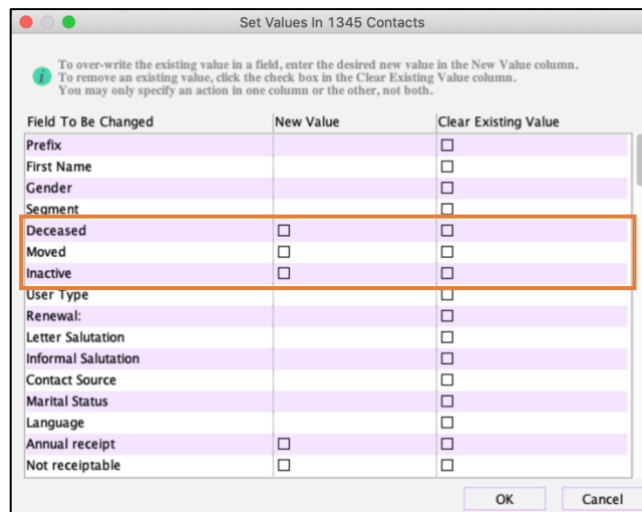*Utilities > Customize Database > Preferences > Pledges*

We have enhanced the control that administrators have over pledge processing notification emails. When configuring your automatic pledge processing preferences, you are now able to toggle between 'Daily' or 'On days that Pledges are processed' as email frequency options.

Contacts

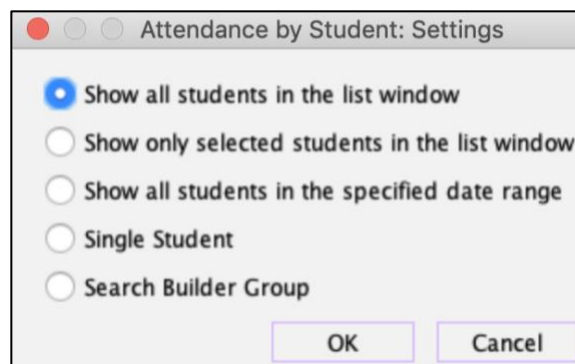*Contacts > Special Editing > Bulk Edit > Other field(s)*

We have made a change to the way the Bulk Edit functionality accepts input for flag fields (checkboxes). In previous versions of Sumac, users were required to either enter 1 or Y into the New Value column in order to set a flag. We have made this action more intuitive in version 4.5.5 by introducing flags to the New Value column for fields that are flags in the contact record. Setting the flag in the New Value column sets the flag in the Contact Records being edited. See the image below:

Course Registrations

Course Registration > Registration View > Analyze & Report > Attendance by Student

We have added a control window to the Attendance Report that prompts the user to enter a desired date range or specify a category of students. These selections are then used to tailor the data presented in the report. The window can be seen below:

Payment Processing

We have updated Sumac's payment processing logic to enhance stability and security. Included in this update was an enhancement to the way that Sumac handles credit card CVV codes.

New! Sumac.com Website

We are excited to announce that we've given Sumac.com a facelift! The most important pages for our existing clients are still our Main Support Page and the Support Portal.

We encourage you to visit both pages and click around to get used to the new look and feel. If you have feedback, we'd love if you helped us improve by reaching out to documentation@sumac.com.

Hint: You can easily access the Support Portal from Sumac.com by clicking Support Services at the bottom of the home page, then the *icon on the support page.*

Reminders & Action Plans

Utilities > Customize Database > Lookup Lists, Area: Reminders, Lookup List: Action Plans

We have improved the drag-and-drop functionality for administrative users editing or creating Action Plans. With this update, you are now able to drag-and-drop individual child steps of action plans without also moving the parent step.

New! User Interface and Our New Logo

We have made more enhancements to our user interface this time, Sumac has a new logo!

This is part of a continued improvement project and the changes you see in this release are part of phase 1. Phase 1 changes started in release 4.5.4 and will continue to roll out over the course of our next few releases.

This means that we have replaced our monochrome leaf-based branding with a redesigned logo and colour set that better suits our updated look! You can expect to see the new icon (shown below) in many areas of the product, including the Main Console, your Desktop, Task Bar and Menu icons.