



Version 4.5.8 Release Notes

2019-12-04

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Introduction

This document describes the changes made to release 4.5.7 of Sumac to create release 4.5.8.

Important Fixes

Sumac includes bug fixes and experience optimizations as a standard part of every 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.

Online Donation Processing

Sumac's online donation platform experienced an intermittent issue where donations made online were not being recorded properly in the database. Fixing this issue was a top priority for us because our job is to make your organization run as smoothly as possible.

We have identified that this issue occurred in rare cases where an invalid character was entered by the donor into one of the website's donation field. Because of this, we have improved the way Sumac handles this error, so that now the donation is not processed until the donor repairs the problem text. Sumac helps the donor with an alert that identifies which field is causing the issue.

Printing

In the last version of Sumac, customers were reporting problems with printing directly from Sumac. We have discovered that this issue was caused by a bug in the most recent version of Java.

We have since implemented a repaired version of Java into Sumac, so the printing issues will resolve in Sumac 4.5.8

Communications

You are now able to click the chain-link icon to see a contact record from within a communications record.

The screenshot shows a 'Communication' dialog box with the following elements:

- Contact:** A text input field with a chain-link icon to its right, highlighted by a red box.
- Communication Type:** A dropdown menu.
- Event:** A text input field with 'Choose Event' and 'Clear' buttons.
- Campaign:** A text input field with 'Choose Campaign' and 'Clear' buttons.
- Source:** A dropdown menu.
- Date:** A text input field showing '2019-12-03' with a calendar icon.
- Notes (complete):** A large text area with a character count '0/8192'.
- URL/File:** A text input field with 'Choose', 'Clear', and 'Open' buttons.
- Sensitive:** A checkbox.
- Entered by Marta:** Text at the bottom left.
- OK** and **Cancel** buttons at the bottom right.

Contacts

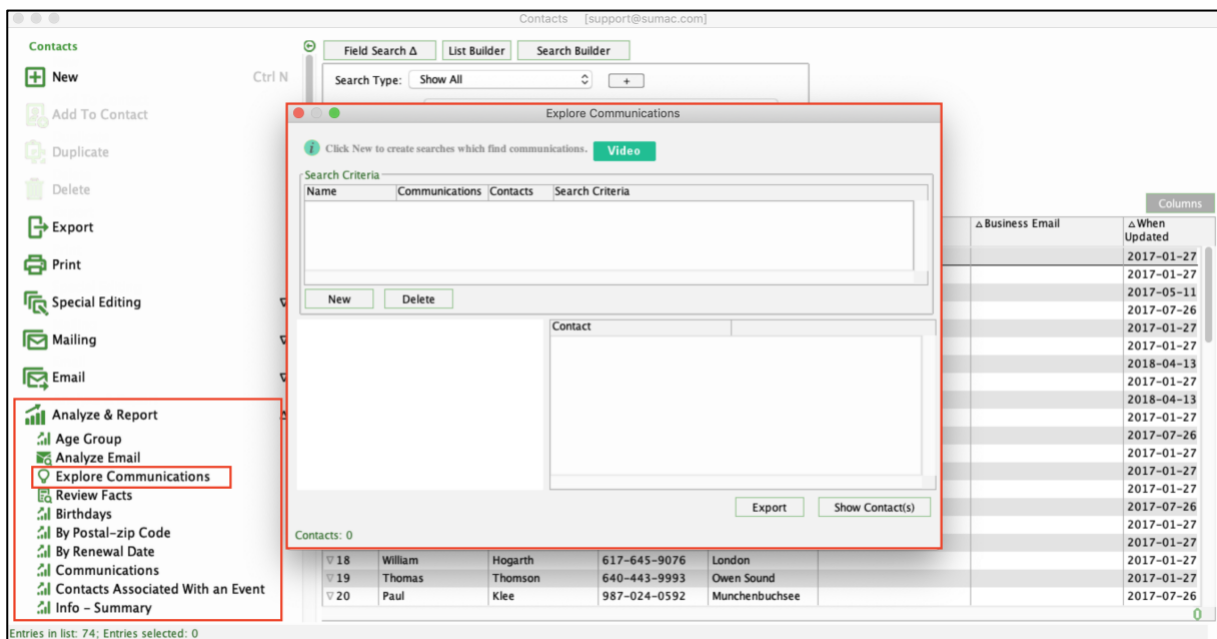
We have made improvements to the Contacts area of Sumac.

Status: Moved

The Move feature available in the contact record has been improved. When a contact's status is changed to "moved" Sumac intuitively offers to move address information for the contact into a Notes field. In this release, the information included in this move has been expanded to include "Business Email".

Explore Communications

You are now able to use the Explore Communications tool from within the contact list. In previous releases, this feature was only accessible through the communications list. To access the feature from the contacts list, go to Contacts > Analyze & Report > Explore Communications.



Course Registration

You are now able to view Contact data as columns in the Registrations lists for the Course Registration module. This functionality also expands into the ability to export this contact data as part of a Registrations export. The feature can be used for a variety of casts, but most importantly it improves usability for Sumac users who need to communicate with registrants in some way and wish to do that without toggling back and forth between Course Registration and Contact lists.

Email

We have made improvements to the way that Sumac handles emailing.

Subject Lines for Notifications

You are now able to control the subject line for the emails automatically sent from Sumac. This is specifically relevant for emails that are automatically sent from an online action like a donation or course registration. Administrators can set this in Utilities > Customize Database > Preferences. The specific tabs where this is relevant in preferences are:

- Course Registrations
- Donations
- Memberships
- Ticketing
- Pledges

MailChimp Integration

The ID and Salutation fields are now included in the export from Sumac to Mail Chimp. This information can then be used in mailings sent from MailChimp.

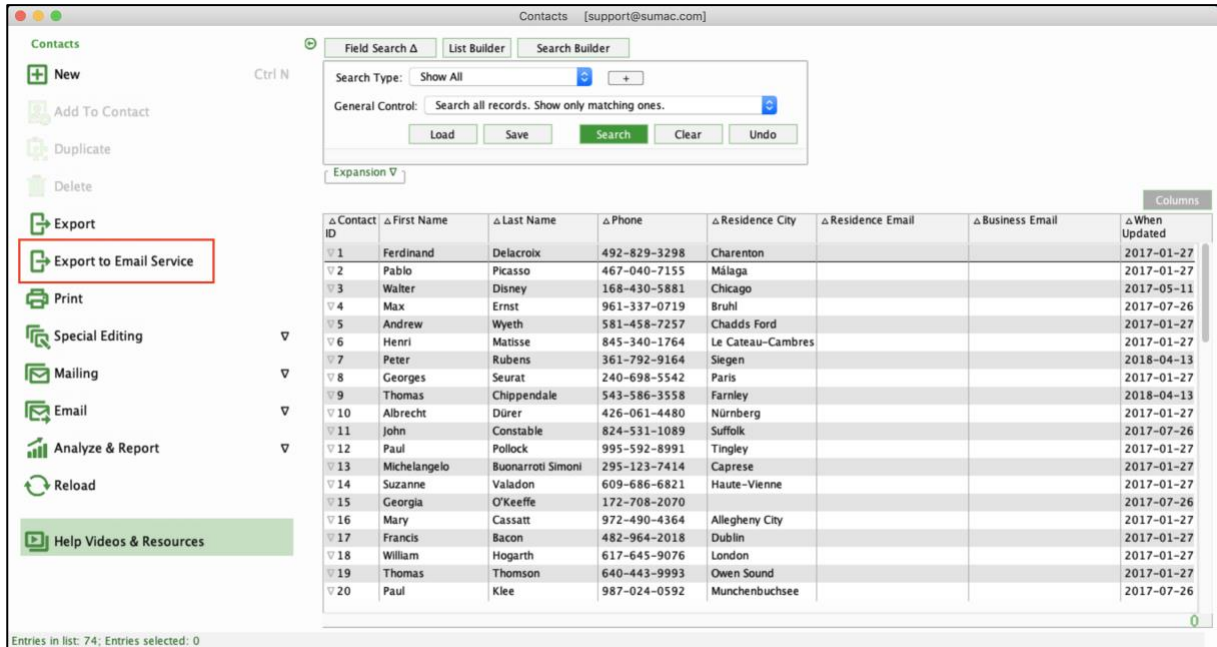
Export to Email Restrictions

Administrators are now better able to restrict which users are able to export contact lists into the third-party email service. This preference is set in Utilities > Sumac Administration > Users > Export to Email Service. When set, the user is able to export to any integrated email services. This preference only appears if your database has an email service set up. This can be done in Utilities > Customize Database > Lookup List > Area: Contacts, List: Email Services.

Data or Commands	View	Edit	Delete	Special
Tour Bookings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Music Records	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Room Reservations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Case Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Case Management 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Time Dockets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Change Lookup Lists	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Administrator				<input checked="" type="checkbox"/>
Bulk Edit & Import				<input checked="" type="checkbox"/>
Adjust Order Pricing				<input checked="" type="checkbox"/>
Ticket Holds				<input checked="" type="checkbox"/>
Receive Email				<input checked="" type="checkbox"/>
Sensitive Data				<input checked="" type="checkbox"/>
Use Duplicate Buttons				<input checked="" type="checkbox"/>
Create Donation Tax Receipts				<input checked="" type="checkbox"/>
Resolve Duplicate Contacts				<input checked="" type="checkbox"/>
Export to Email Service				<input checked="" type="checkbox"/>

Export to Email Service Button

In past versions of Sumac, exports to an integrated email services were triggered by clicking the Export button on the side panel of the Contacts list. This means that each time a user wanted to run a non-email export they were required to reject the “Would you like to export to an email service?” prompt. To simplify this workflow, we have added a dedicated “Export to Email Service” button on the side panel of the Contacts list. This button only displays for users who have the permission for exporting enabled (See the previous item in this list).



The screenshot shows the Sumac Contacts interface. The side panel on the left contains various actions, with 'Export to Email Service' highlighted in a red box. The main area displays a table of contacts with columns for ID, First Name, Last Name, Phone, Residence City, Residence Email, Business Email, and When Updated. The table contains 20 rows of contact data.

△ Contact ID	△ First Name	△ Last Name	△ Phone	△ Residence City	△ Residence Email	△ Business Email	△ When Updated
1	Ferdinand	Delacroix	492-829-3298	Charenton			2017-01-27
2	Pablo	Picasso	467-040-7155	Málaga			2017-01-27
3	Walter	Disney	168-430-5881	Chicago			2017-05-11
4	Max	Ernst	961-337-0719	Bruhl			2017-07-26
5	Andrew	Wyeth	581-458-7257	Chadds Ford			2017-01-27
6	Henri	Matisse	845-340-1764	Le Cateau-Cambresis			2017-01-27
7	Peter	Rubens	361-792-9164	Siegen			2018-04-13
8	Georges	Seurat	240-698-5542	Paris			2017-01-27
9	Thomas	Chippendale	543-586-3558	Farnley			2018-04-13
10	Albrecht	Dürer	426-061-4480	Nürnberg			2017-01-27
11	John	Constable	824-531-1089	Suffolk			2017-07-26
12	Paul	Pollock	995-592-8991	Tingley			2017-01-27
13	Michelangelo	Buonarroti Simoni	295-123-7414	Caprese			2017-01-27
14	Suzanne	Valadon	609-686-6821	Haute-Vienne			2017-01-27
15	Georgia	O’Keeffe	172-708-2070				2017-07-26
16	Mary	Cassatt	972-490-4364	Allegheny City			2017-01-27
17	Francis	Bacon	482-964-2018	Dublin			2017-01-27
18	William	Hogarth	617-645-9076	London			2017-01-27
19	Thomas	Thomson	640-443-9993	Owen Sound			2017-01-27
20	Paul	Klee	987-024-0592	Munchenbuchsee			2017-07-26

Funder Requests

When entering a new donation, Sumac now checks the donor to see for existing fund requests. If a fund request is present, the user is presented with an alert, suggesting that they attach the donation to a fund request. This is useful for ensuring that the data you enter is thorough and considerably entered. You will now avoid the issue of missing critical donations when evaluating fund requests.

Pledges

Administrators are now better able to control the date controls for donors on their website. In Utilities > Customize Database > Preferences > Pledge tab: Website Integration > Default end date for pledges entered online. There are now three options:

- **Default end date.** This option allows you to enter a set end date for all new online pledges. This is a manually set date and is the responsibility of the organization to keep updated.
- **Duration (based on first donation date).** Setting this option tells Sumac to count x number of months from the date of the first donation to set the expiry. For example, if the value here is set to 12, then the expiry for a pledge made on December 12, 2019 will be set to December 12, 2020. The maximum value for this field is 60.
- **No end date.** This is the option set by default by sumac and does not impose an end date on pledges.

The screenshot shows the 'Preferences' window with the 'Pledges' tab selected. The 'Website Integration' section is highlighted with a red box. The 'Default end date for pledges entered online' section contains three radio button options: 'default end date' (with a date field set to 2029-11-03), 'duration (based on first donation date)' (with a value of 60 months), and 'no end date' (which is selected).

Website Integration

Default campaign for online pledges: Choose Campaign Clear

Default end date for pledges entered online:

- default end date: 2029-11-03
- duration (based on first donation date): 60 months
- no end date

Email pledge confirmation: subject line: Confirmation of Pledge to Organization Name

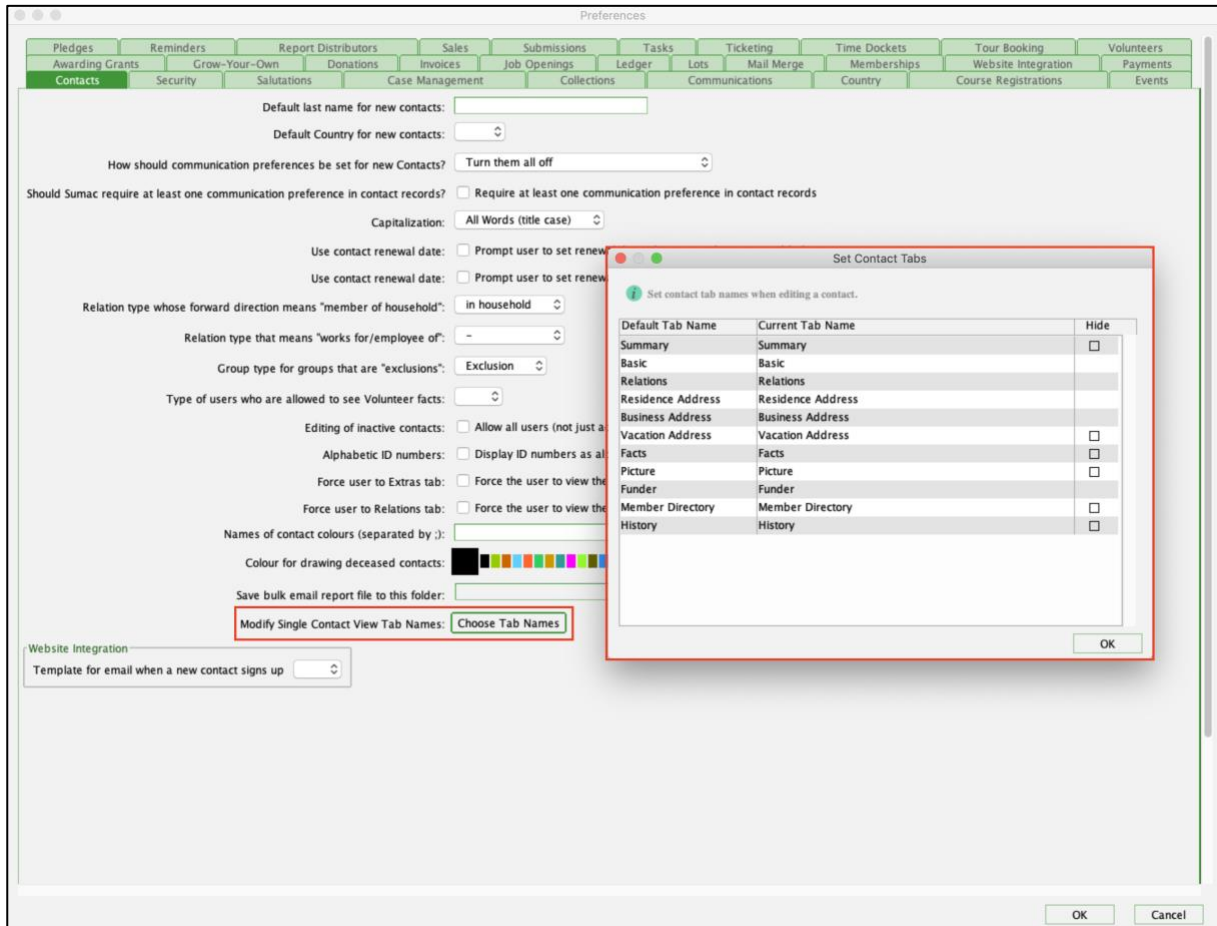
Email pledge confirmation: email message template: If no custom template is set, a non-editable default template will be used

Days of the month on which pledges can be charged (separate by ;)

OK Cancel

Preferences

We have simplified the way that administrators modify the which tabs show in Contact records. In Utilities > Customize Database > Preferences > Contacts, tabs can now be modified in one spot. The available modifications include hiding and renaming tabs as necessary. In the past, tabs were enabled with checkboxes displayed on the main Contact preferences page.



Search Builder

You are now able to search by inactive campaigns in Search Builder. In the past, only active campaigns were searchable in Search Builder.