



Version 4.5.19 Release Notes

Nov. 24, 2021

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Introduction

This document describes the changes made to release 4.5.18 of Sumac to create release 4.5.19.

Attach files in Sumac

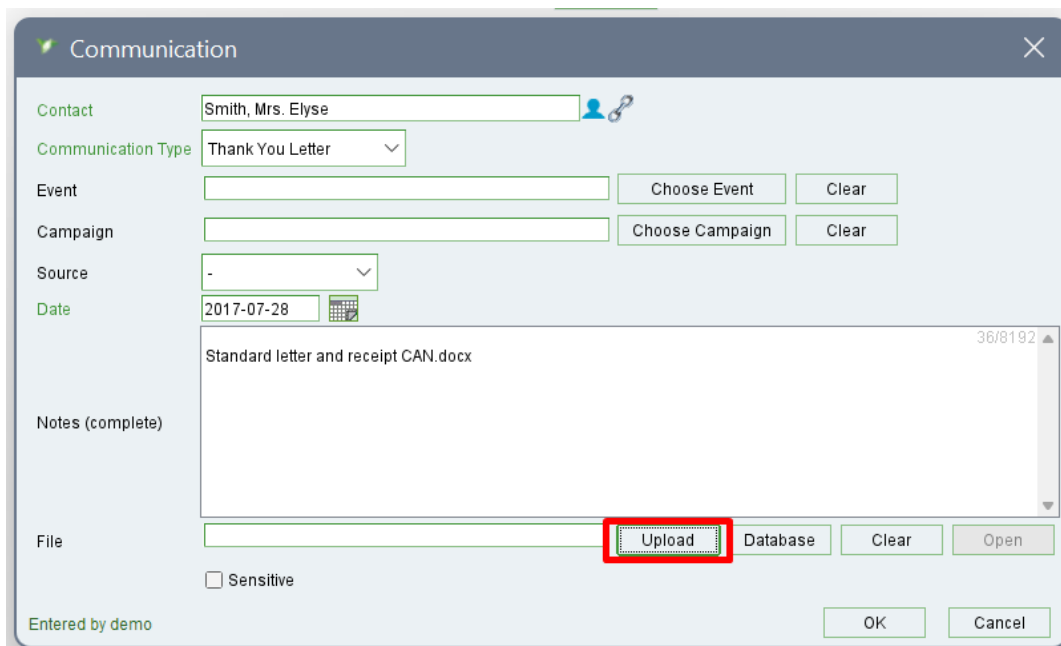
New feature

With the Sumac 4.5.19 release comes the ability to upload a file directly into your database!

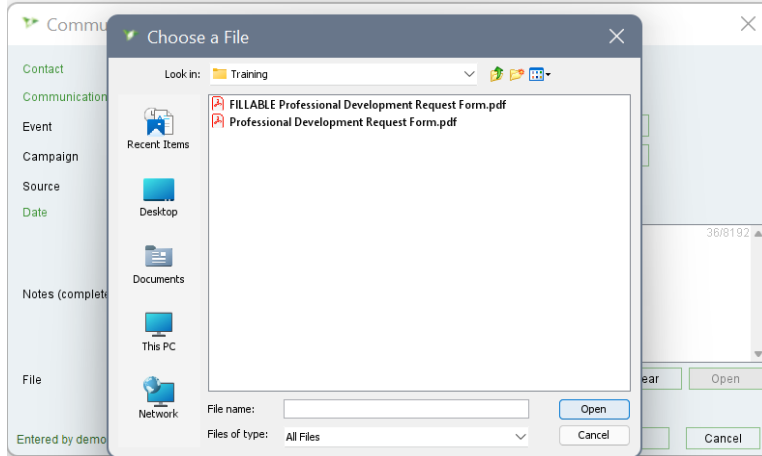
Until now, a user could link a file in Sumac, but the file still 'lived' on the user's computer. If the file was moved or deleted, this would break the link in Sumac, making it difficult to find the file again. This new upload ability means that files can be uploaded to the database, are included in Sumac backups, and stay available even if deleted from the user computer. The file size limit for each file uploaded is 16MB.

Additional Notes

The file upload functionality is not available in Case Management or Custom areas of Sumac yet, but this will be coming in the new year! This functionality is only available for clients using our cloud-hosting service. If you have a self-hosted database, please [contact our Sales team](#) to explore upgrading to cloud-hosting to take advantage of this new feature!



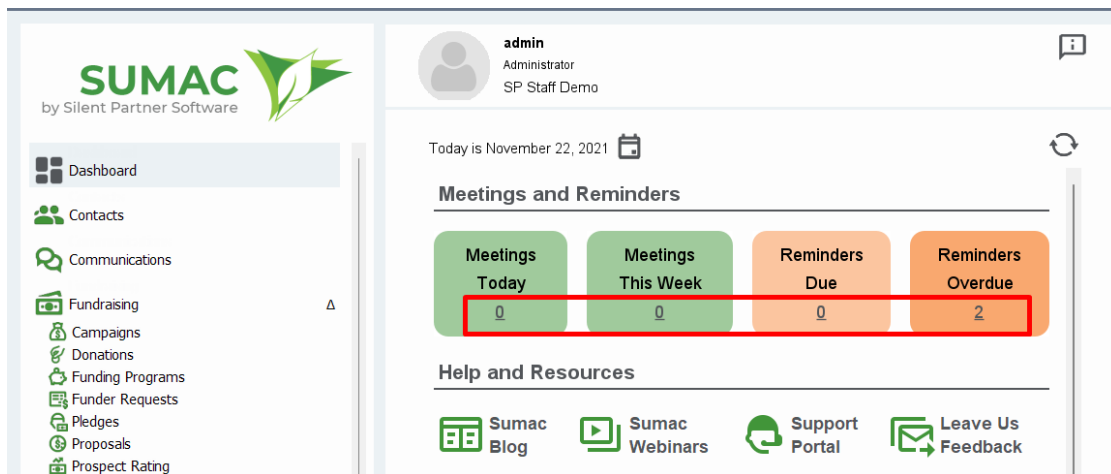
The screenshot shows a 'Communication' form in Sumac. The form includes fields for Contact (Smith, Mrs. Elyse), Communication Type (Thank You Letter), Event, Campaign, Source, and Date (2017-07-28). A text area contains the note 'Standard letter and receipt CAN.docx'. At the bottom, there is a 'File' field with an 'Upload' button highlighted in a red box, along with 'Database', 'Clear', and 'Open' buttons. A 'Sensitive' checkbox is also present. The bottom right corner has 'OK' and 'Cancel' buttons. The text 'Entered by demo' is visible in the bottom left corner.



Clickable Dashboard

New Feature

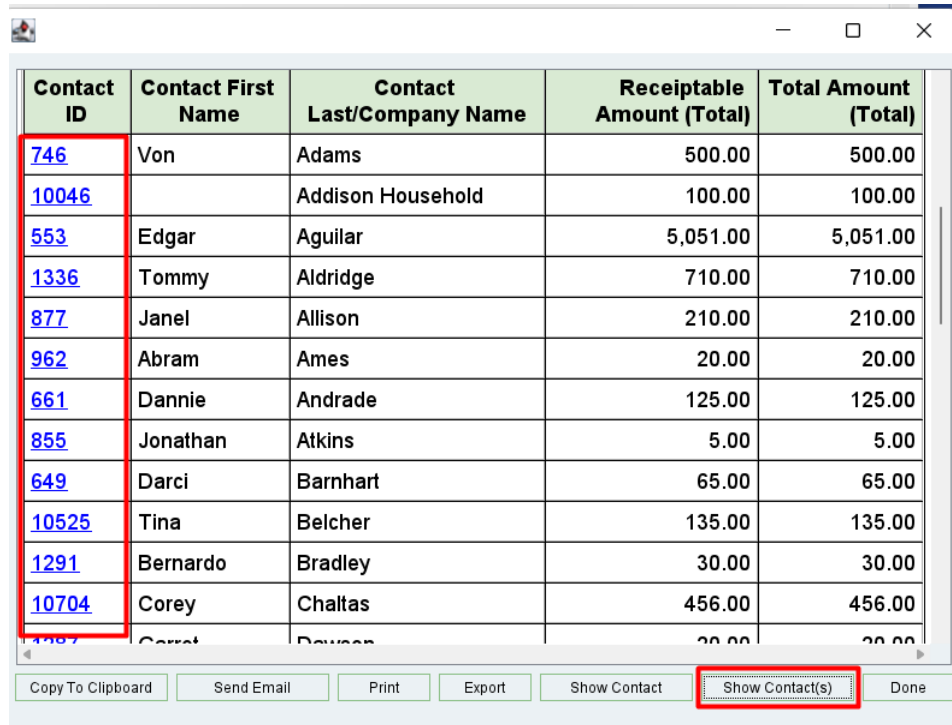
In this release we updated the Sumac Dashboard to provide access to the Dashboard statistics with just one click. Whenever you see an item in the Dashboard is underlined, this means you can click the item to see the details behind that statistic. For example, if your Dashboard shows you that two reminders are overdue, click the “2” and you will see exactly which reminders need your attention.



Exciting enhancement to built-in reports

There are two significant changes made to Sumac's built-in reports that make it easier for you to access contacts right from your reports:

1. Contact IDs and Names are now clickable. When you run a report that includes a list of contact names and information, you can click any contact's name to open their contact record and see more information about them.
2. A new "Show Contact(s)" button in the bottom-right corner of the report allows you to quickly show all contacts referenced in the report in a single list!



The screenshot shows a report window with a table of contact information. The table has five columns: Contact ID, Contact First Name, Contact Last/Company Name, Receiptable Amount (Total), and Total Amount (Total). The Contact ID column contains blue hyperlinks for each row. A red box highlights the Contact ID column. Below the table is a toolbar with several buttons: Copy To Clipboard, Send Email, Print, Export, Show Contact, Show Contact(s), and Done. The Show Contact(s) button is highlighted with a red box.

Contact ID	Contact First Name	Contact Last/Company Name	Receiptable Amount (Total)	Total Amount (Total)
746	Von	Adams	500.00	500.00
10046		Addison Household	100.00	100.00
553	Edgar	Aguilar	5,051.00	5,051.00
1336	Tommy	Aldridge	710.00	710.00
877	Janel	Allison	210.00	210.00
962	Abram	Ames	20.00	20.00
661	Dannie	Andrade	125.00	125.00
855	Jonathan	Atkins	5.00	5.00
649	Darci	Barnhart	65.00	65.00
10525	Tina	Belcher	135.00	135.00
1291	Bernardo	Bradley	30.00	30.00
10704	Corey	Chaltas	456.00	456.00
1387	Corrat	Deussen	20.00	20.00

Executive Summary Report

New Feature

We've added a new Executive Summary report that Sumac can email directly to your Executive Director, Fundraisers, or Board Members for you automatically. This report helps you effortlessly share important information about Donation Statistics with your team.

Executive Summary for October 2021

This report provides an executive summary of Donations received within the time periods shown below.

Year to Date Summary and Last Year to Date Comparison

	January - October	October
2021	1,075.00	1,075.00
2020	4,393.00	400.00

First Time Donors in October 2021

Donor	Donation Count	Donation Amount
Anonymous	1	250.00
B Holliss	1	75.00
Conzelman, Jim	1	750.00

Major Donors in October 2021

Donor	Donation Count	Donation Amount
Anonymous	1	250.00
Conzelman, Jim	1	750.00

This Executive Summary report was created automatically by Sumac on 2021-11-15 at 09:42

To turn this feature on and customize who will receive the report, go to Utilities > Customize Database > Preference. On the Reports tab, you will find the new 'Executive Summary' configuration settings.

Preferences

Case Management | Collections | Communications | Contacts | Country | Course Registrations | Donations | Events | Grow-Your-Own | Invoices | Job Opening | Payments | Pledges | Reminders | Report Distributors | **Reports** | Sales | Security | Submissions | Ticketing | Time Dockets | Tour Booking

Reports logo file: Social_Cover Choose Clear

Files larger than 25 MB won't be included when emailing reports out of Sumac.

Reports logo height (pixels): 100

Reports logo justification: Left Center Right

Default Colour for Headers: [Color Selection] Custom

Executive Summary

Turn on Auto Executive Summary Report

Day of month to run report: 23

List of email addresses to send report (one per line): email@companyname.org 21/255

Threshold for major gifts: 1000

Integration with Outlook Calendar

New Feature

In previous versions of Sumac, you could easily add Meetings to your Google Calendar. In this release, we have extended that capability to Outlook calendars as well.

The screenshot shows a 'Reminder' form window. The 'Contact' field is filled with 'Abel, Ms. Maudie'. Below it are buttons for 'Past Communications', 'New Communication', and 'Add To Contact'. The 'Assigned User' is set to 'admin' with a 'Flag' checkbox checked. The 'What To Do' field contains 'meeting with John'. The 'Notes' field is empty. The 'Action Type' is 'meeting' and the priority is 'High'. There are fields for 'Event' and 'Campaign' with 'Choose Event' and 'Choose Campaign' buttons. The 'Meeting' radio button is selected. The 'Meeting' section includes a date picker for 'Bring forward date' (2021-09-03), 'Start Time' (01:00 PM), 'End Time' (04:00 PM), 'Location' (Zoom), and 'Notification Time' (15 minutes before meeting). A dropdown menu for 'Add to Calendar' is open, showing options for 'Google' and 'Outlook', with 'Outlook' highlighted by a red box. At the bottom, there are 'Print', 'OK', and 'Cancel' buttons, and a status field showing 'Entered by admin on 2021-09-02'.

New options for Basic and Advanced searching

This release provides a new quick Basic Search field to provide you with fast access to the most common search option in each area of Sumac. We have also separated our search capability into Basic and Advanced searching.

Basic Search

You can run a quick search using the Basic Search field. For example, in the Contact list, you can type a contact's first name into the Basic Search field to quickly search for contacts.

Advanced Search

Whenever you want to search more more detailed options, expand the "Advanced" menu to find all other searches and filters you may need to perform more advanced searches.

This change makes it easier and faster to run simple searches in the database, and provides more space in each area of Sumac to show you more data in your list!

☰ Contact Name Search

Advanced ▾

Expansion ▾

△ User Type △ First Name △ Pronoun △ Last Name

Contact Name Search

Advanced ▾

Field Search ▾ List Builder Search Builder

Search Type: Show All ▾ +

General Control: Search all records. Show only matching ones. ▾

Load Save Search Clear Undo

Expansion ▾

Office365 email attachment limit increased

In previous versions of Sumac, users who had integrated Sumac with their Office 365 account to send bulk emails were unable to include attachments on bulk emails if the attachment was larger than 3MB. In this release, we have been able to increase this attachment size limit to 24MB.

Quick Install for new users

Installing Sumac on a new computer has never been easier! We have modernized the installation procedure to make installing Sumac for new users or new computers smoother and simpler to follow.