Version 4.5.13 Release Notes

July 15, 2020

Contents

Introduction

This document describes the changes made to release 4.5.12 of Sumac to create release 4.5.13.

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 Stalled Search When Using Membership Criteria in Search Builder

In past releases, Sumac was not able to effectively complete searches in Search Builder when using Membership criteria. Search Builders using Membership criteria would stall.

In this release of Sumac, this issue has been resolved. Searches that use Membership criteria in Search Builder will complete successfully.

Improved Handling of International Country Codes for Payment Processing

We have addressed an issue where Sumac was not correctly converting country codes when processing payments from international donors. Most payment processors require converting a country's name (e.g. Canada) to a two-letter abbreviation (e.g. CA). This was working correctly for most countries, but some international countries' two-letter abbreviations were not converting correctly.

In this release, Sumac correctly converts international countries to their two-letter country code abbreviation (e.g. "France" is correctly converted to "FR").

Expanded View Own and Add Permissions

New Feature!

In our previous 4.5.11 release, we introduced two new permissions: View Own, and Add. These permissions were made available for only the Contacts, Donations, Pledges and Course Registrations areas of Sumac. In this 4.5.13 release, we have expanded the new View Own and Add permissions to the Case Management and custom Grow-Your-Own areas of Sumac!

You can now set a user's permission to view only entries they've 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 for Case Management or custom Grow-Your-Own records, 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	
Pledges	View All	☒	☒	☒		^
Payments	☒		☒	☒		
Report Distributors	☐		☐	☐		
Sales	☐		☐	☐		
Proposals	☐		☐	☐		
Prospect Ratings	☐		☐	☐		
Reminders	☒		☒	☒		
Submissions	☐		☐	☐		
Memberships	☐		☐	☐		
Subsidiaries	☐		☐	☐		
Volunteer & Staff Tasks	☐		☐	☐		
Ticket Orders	☐		☐	☐		
Tour Bookings	☐		☐	☐		
Custom Records 1	View All	☒	☒	☒		
Custom Records 2	View All	☒	☒	☒		
Case Records 1	View All	☒	☒	☒		
Case Records 2	View All	☒	☒	☒		
Time Dockets	☒		☒	☒		
Users In Segment	☒		☒	☒		
Change Lookup Lists	☐		☐	☐		v

View

Specify View permission

View All ∨

Restricted
View Own
View All

OK   Cancel

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