



Version 4.5.6 Release Notes

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Contents

<i>Introduction</i>	2
<i>Course Registrations and Website Integration</i>	2
<i>Memberships</i>	2
<i>Notifications</i>	2
<i>Payment Processing and Time Zones</i>	2
<i>Pledge</i>	3
Revenue Forecast (Detail)	3
Automated Pledge Processing	3
<i>User Interface Enhancements</i>	3

Introduction

This document describes the changes made to release 4.5.5 of Sumac to create release 4.5.6

Course Registrations and Website Integration

Utilities > Customize Database > Preferences > Course Registrations > Website Integration: attachment field

When using Course Registrations with Website Integration, Sumac is able to send confirmation emails to registrants after they sign up for a course online. In the most recent release of Sumac, we have added the ability to include a document attachment to the confirmation email. This allows you to automate the process of sending mandatory documentation to all new registrants. In order to add a file through the preferences window, an administrator must first upload it to the database through Utilities > Customize Database > Lookup Lists.

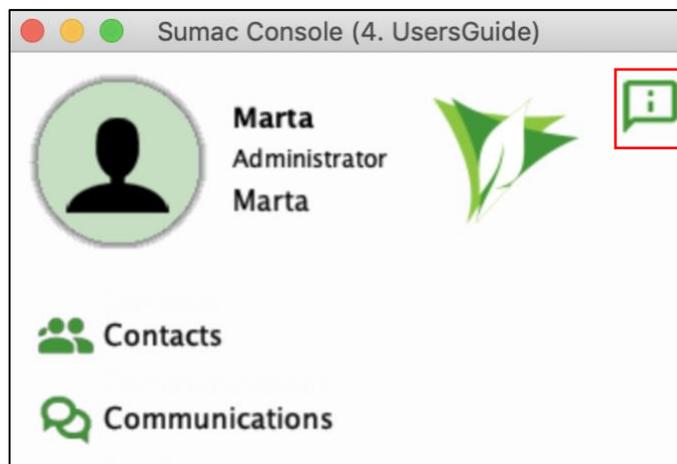
Memberships

Specialized > Memberships > Searching

The Memberships list search fields now allow you to exceed the maximum of 10 criteria when performing a search.

Notifications

In the past release, a notification icon was added to the top of the main console. In Sumac 4.5.6, this icon has been enhanced and can now be used to access meaningful information about new features and automated processes. When there is a notification from Sumac that should be read by a user, a notification badge appears on the icon. Click the icon to access a list of reports and click the summary link of an issue you would like to read more about.



Payment Processing and Time Zones

Utilities > Customize Database > Offices: Office Record

Sumac now supports and honours the Time Zone set in the main Office record. When this is enabled, Time Zones are considered in all financial transactions such as Pledge Processing, Donations and Ledgers. Sumac is set to use Eastern Time by default but can be customized by an administrator.

If there is no time zone set, Sumac notifies the first user that logs in on the new release. By default, the Eastern Time Zone is set. Learn more about setting up your office by watching our [How To Set Up Offices](#) video.

Pledge

Fundraising > Pledges > Analyze & Report

We have enhanced two of the reports available for Pledge processing:

Revenue Forecast (Detail)

We have enhanced the Revenue Forecast (Detail) report in the pledges module by adding the following two features:

- A Received column. This allows you to see which pledges have been fulfilled at a glance, and which pledges are awaiting a donation.
- Legend button. Click this button to see a description of the report's functions.

Automated Pledge Processing

A report has been added that allows you to see the pledges that were processed with the automatic pledge processing functionality. The report is visible on all instances of Sumac but only contains data if Automated Pledge Processing is active and enabled by an administrator in the preferences menu.

User Interface Enhancements

We are continuing our effort to improve Sumac's user interface and user experience. In this release, the ongoing project has included:

- A subtle change in the way menu items are highlighted on the main console.
- A unified Sumac colour scheme. We have removed the option to customize the colours in Sumac in an effort to streamline all user's experience with the product. Green is set by default, but users in need of accessibility accommodations can change the scheme to high contrast black and white. Change this in Utilities > Customize Database > Appearance.
- Text layout and flow improvements: This release saw fixes to abnormal text spacing in assorted dialogs, such as the log in window.