



Version 4.5.17 Release Notes

May 19., 2021

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Introduction

This document describes the changes made to release 4.5.16 of Sumac to create release 4.5.17.

Client Support gets improved screen sharing tool

For many years, the Sumac Support team has used TeamViewer9 to connect and share screens with clients who call in for help. This worked well for many years, but with TeamViewer moving forward without support for version 9, we needed to upgrade our tools to make sure our team can continue providing the support our clients need!

We will be using a new screen sharing tool called “Splashtop” to provide remote support to our clients as needed. Our Install Support Software link has been upgraded to make it quick and simple for clients to use Splashtop when connecting with our Support team.



Our team can also support Zoom meeting links for workshops, training and support calls.

Enhancements to Sumac Dashboard

This release introduces several improvements to the Sumac Dashboard, including interface improvements, and new dashlets for Reminders, Donations, and Memberships!

We have improved the layout, fonts, colours, and icons to make the Dashboard easier to read and use.

The screenshot shows the Sumac Dashboard interface. On the left is a navigation menu with the following items: Dashboard, Contacts, Communications, Fundraising (with a sub-menu: Campaigns, Donations, Funding Programs, Funder Requests, Pledges), Events, Financial, Time & Scheduling, and Utilities. The main content area includes a user profile for 'demo' (Administrator, SP Staff Demo), the current date 'Today is May 16, 2021', and several data dashlets:

- Meetings and Reminders:**
 - Meetings Today: 2
 - Meetings This Week: 2
 - Reminders Due: 1
 - Reminders Overdue: 6
- Help and Resources:**
 - Sumac Blog
 - Sumac Webinars
 - Support Portal
 - Leave Us Feedback
- Contacts:**
 - Contacts Available: 3744/5000
 - Contacts Added: 1256
- Donor Summary:**

		Donor Retention	
		2020	2021
New Donors	Lapsed Donors		
This Month 0	This Month 3	Donor Count 12	3
This Year 5	This Year 9	Percentage 100.00 %	25.00 %

This release also introduces several new dashlets as well!

The Meetings & Reminders dashlet gives you a look at your to-do list for the week at a glance:

Today is May 16, 2021 

Meetings and Reminders

Meetings Today 2	Meetings This Week 2	Reminders Due 1	Reminders Overdue 6
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The new Donation Summary dashlet provides a high-level comparison of the donations made to your organization this year, this month, and last month:

Donation Summary

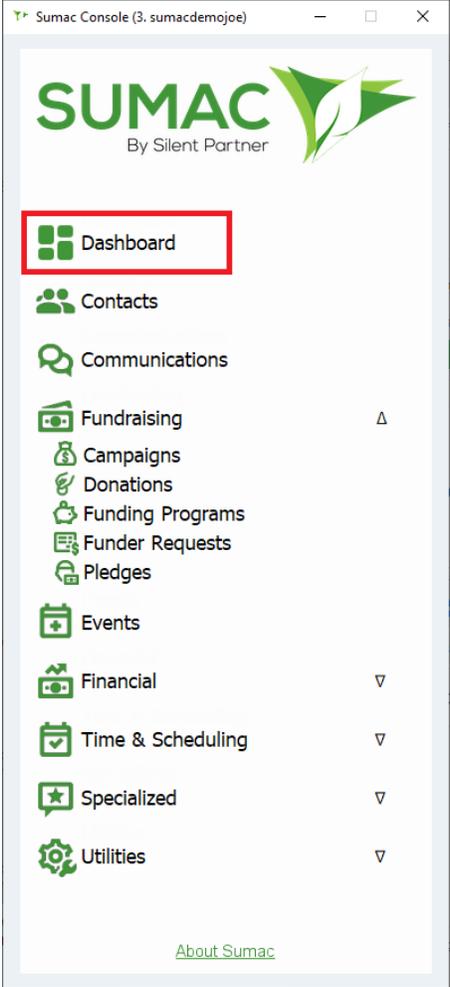
	Count	Amount	Largest	Smallest	Average	Median
This Year	13	\$ 2610.00	\$ 1000.00	\$ 20.00	\$ 200.77	\$ 100.00
This Month	3	\$ 570.00	\$ 500.00	\$ 20.00	\$ 190.00	\$ 50.00
Last Month	4	\$ 540.00	\$ 444.00	\$ 30.00	\$ 135.00	\$ 33.00

The Memberships dashlet provides you with important membership information at a glance, like the number of new members, lapsed members, and a summary of your membership retention rate:

Membership Summary

New Members		Member Retention		
This Month	0		<u>2020</u>	<u>2021</u>
This Year	0	Member Count	11	0
		Percentage	100.00 %	0.00 %

This release also allows you to collapse or expand the Dashboard. Just click the “Dashboard” button in your Sumac console, and Sumac collapses or expands the Dashboard as desired.



Improved membership pages and automatic renewals

New Feature - Online membership pages

In our June 2020 release, we introduced a new era of Sumac Web Forms with a new Online Donation Form integrated with iATS payment processing. We are excited to announce that in today's release, we have enhanced Sumac Web Forms to provide new Membership forms as well!

Our new Membership forms provide simple, modern pages for your website. These pages display your membership options clearly on your site, allowing new members to purchase their first membership to your organization.

Membership Management

Already a member?

[Login](#) to see your profile and membership status

Membership Options

Adult Membership

Required Donation	\$100
Annual Fee	\$20

[Purchase >>](#)

Student Membership

Annual Fee	\$60
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[Purchase >>](#)

Senior Membership

Required Donation	\$10
Annual Fee	\$50

[Purchase >>](#)

Powered by Sumac Nonprofit CRM Software

Become a Member

[Options](#) > [Member Info](#) > [Review & Confirm](#) > [Payment](#)

Member Info

First Name <i>(required)</i>	Last Name <i>(required)</i>	
<input type="text"/>	<input type="text"/>	
Email <i>(required)</i>		
<input type="text"/>		
Street Address <i>(required)</i>		
<input type="text"/>		
City <i>(required)</i>	Prov/State <i>(required)</i>	Postal <i>(required)</i>
<input type="text"/>	<input type="text"/>	<input type="text"/>
Country <i>(required)</i>		
<input type="text"/>		
Phone		
<input type="text"/>		

[Review & Confirm](#)

Powered by Sumac Nonprofit CRM Software

The pages also allow existing members to log in and renew their membership each year.

Log into your Membership Account

Username:

Password:

[LOG IN](#)

[Reset your password](#)

[Create a new account](#)

Powered by Sumac Nonprofit CRM Software

Whether a new contact is purchasing their first membership, or a long-time member wants to log in and renew, Sumac saves all of their membership information into your database. If you would like to use the new Sumac Membership Pages on your website, [contact our team](#) to learn more!

New Feature - Let members opt-in for automatic renewal

This release also introduces an exciting new feature that makes membership renewals easier than ever before.

When members purchase or renew their membership through our new Membership Web Form, they can opt-in for their membership to be renewed automatically at the end of its term. This is a great way to improve your membership retention rates; your members no longer need to remember, or make the choice to renew each year. Instead, Sumac can take care of the renewal for them without you doing a thing!

Each day, your Sumac database will check for any memberships that are scheduled for automatic renewal, and takes care of processing the payment and renewing that member's membership. It also sends the member a confirmation email once the renewal is complete.

To enable the Automatic Renewal feature for the Memberships add-on, just turn on the Auto-Renew feature in your database preferences (from your Sumac console, expand Utilities > Customize Database > Preferences > Memberships tab).

The screenshot displays the 'Membership Auto Renewal' settings interface. It is divided into two main sections: 'Membership Auto Renewal' and 'Member Confirmation Email settings'. In the 'Membership Auto Renewal' section, the 'Auto Renew Membership' checkbox is checked, with a red arrow pointing to it. The 'Time of day to run' is set to '09:00 AM'. The 'Auto-Renewal Report settings' section shows a list of email addresses containing 'membership@demonstrationcharity.com', with a red arrow pointing to the list. Below this, the 'Send Auto-Renewal Reports' section has radio buttons for 'Every day' and 'On days that Renewals are processed', with the latter selected. The 'Member Confirmation Email settings' section includes fields for 'Outgoing Email: Display Name' (set to 'Demonstration Charity'), 'Outgoing Email: "From" Address' (set to 'membership@demonstrationcharity.com'), and 'Outgoing Email: Subject' (set to 'Your membership has been renewed!'). A red arrow points to the 'From' address field. The 'Email Template' is set to 'Online Membership Confirmation'.

Membership Auto Renewal

Auto Renew Membership Turn on auto-renewal feature

Time of day to run

Auto-Renewal Report settings

List of email addresses (one per line)

Send Auto-Renewal Reports Every day On days that Renewals are processed

Member Confirmation Email settings

Outgoing Email: Display Name

Outgoing Email: "From" Address

Outgoing Email: Subject

Email Template If no custom template is set, a non-editable default template will be used

Once enabled, the Auto-Renew checkbox appears in each membership record. Sumac will set this for you if the member opts-in when purchasing their membership through your website. Alternatively, you can set this manually if a member contacts you and requests this option.

Membership

Member: Watson, Meaghan

Member 2: [Empty]

Billing Contact: Watson, Meaghan

Gift Membership

Membership Type: Individual Membership

Start Date: 2020-06-05

End Date: 2021-06-04

Payment Date: [Empty]

Fee: 60.00

GST: 3.00

Donation: 0.00

Total: 63.00

Payment Type: [Empty]

Campaign: [Empty] Choose Campaign Clear

Source: -

Notes: [Empty]

Renewal Complete

Auto-Renew

Cancelled

When Cancelled: [Empty]

Cancelled Note: [Empty]

Updated by demo on 2019-01-17

Allocate Payment to Accounts

First account/amount	1330 Merchandise Sale	60.00
Second account/amount	Surcharges	3.00

OK Cancel

Integrations with Microsoft Office365 and Google

New Feature - Office365 for bulk emails

In this release of Sumac, we are introducing direct integration with Microsoft Office365 for sending bulk emails! Instead of using an internal SMTP server, Sumac now has improved integration allowing you to use your Office365 account for sending emails. This makes configuring your database to send emails much simpler.

If you want to use Office365 as your SMTP server for sending bulk emails through Sumac, this integration allows you to Log In with Microsoft to validate your credentials and connect your Office365 account to Sumac. Once this is configured, Sumac will use your Office365 account for all emails it sends.

The screenshot shows the 'Office' configuration window with the following fields and options:

- Organization Name: Demonstration Charity
- Visible Name: Demonstration Charity
- Street A: 123 Main Street
- Street B: (empty)
- City: Toronto
- State: (empty)
- Country: Canada
- Postal Code: M5T 2C2
- Phone: (empty)
- Extension: (empty)
- Fax: (empty)
- Web Site: (empty)
- Charity Number: 123 456 789
- Default Office
- Time Zone: Eastern (dropdown)
- Email Settings:
 - SMTP
 - Gmail
 - Office365 (highlighted with a red box)
- Microsoft Account: demonstrationcharity@outlook.com
- Log In Microsoft (button, highlighted with a red arrow)
- Clear Microsoft Account (button)
- Outgoing Email: Display Name: Demonstration Charity
- OK (button)
- Cancel (button)

New Feature - "Add to Calendar" for Google Calendar

This release also introduces the option to add Meetings to your Google Calendar! If you are using Sumac Reminders to schedule meetings for yourself and team members, you may want to add some of these meetings to your Google Calendar to make it more convenient to invite more team members and access the meeting details outside of Sumac. When creating meetings in Sumac, use the new "Add to Calendar" feature to add this reminder to your Google calendar.

The screenshot shows the 'Reminder' form in Sumac. The 'Meeting' section is active, and the 'Add to Calendar' dropdown menu is open, showing options for 'Google' and 'Outlook.com'. A red arrow points to the 'Google' option, which is highlighted with a red box. The form includes fields for Contact (Watson, Meaghan), Assigned User (demo), What To Do (call Meaghan to discuss plans for upcoming Capital Campaign), Notes, Action Type (Medium), Event, Campaign, Bring forward date (2021-05-20), Start Time (10:00 AM), End Time (11:00 AM), Location (Meaghan is at extension 808), Notification Time (0 minutes before meeting), and Status. The form is entered by demo on 2021-05-16.

The screenshot shows the Google Calendar event creation page for a meeting with Meaghan Watson. The event is scheduled for May 20, 2021, from 10:05am to 11:05am (GMT-04:00) Eastern Time - New York. The event details include 'Add Google Meet video conferencing', the location 'Meaghan is at extension 808', a notification of 10 minutes, and the guest 'Meaghan Watson'. The guest permissions are set to 'Modify event', 'Invite others', and 'See guest list'. The event description is 'Meeting with Meaghan Watson at 10:00 AM, America/New_York Created from Sumac CRM'.

Online donation improvements

New Feature - Let donors cover the processing fee for donations

Our Sumac donation pages now support two important new features: the option for donors to cover the processing fee for their donation, and automatic receipting! When a donor makes a gift to your organization, there is a small fee for the cost of processing that payment (e.g. 2.5%. The exact amount of this fee is based on your merchant account with your chosen payment processor).

After today's release, your Sumac donation page provides donors with the option to cover the cost of that payment processing fee, and when selected, it means that 100% of that donation goes directly to your organization!

Choose your donation amount and details:

Donation Amount *(required)*

\$100 - Jump **\$200 - Kick Start** **\$500 - Blast Off!**

Other (\$)

Cover the Processing Fee \$2.20

New Feature - Automatic receipting for new Sumac Donation pages

This release also introduces automatic receipting for our new online donation pages. You specify the template Sumac should use for donations made through your website, and once the donation is saved into your database, Sumac automatically creates a tax receipt for the donation, and emails the receipt to the donor without you having to do a thing!

Confirmation email settings for online donations

Email donation/payment confirmation: "from" email display name:

Email donation/payment confirmation: "from" email address:

Email donation/payment confirmation: "bcc" email address:

Email donation/payment confirmation: subject line:

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

Receipt settings for online donations

Email donation receipt template (for auto-generated receipts): ↩

Are donation receipts numbered by contact segment or continuous for all contacts? Online donation receipt numbers should be segment-specific

Payment Status window gets new “Connect Payment” button

In previous releases of Sumac, if a user entered a new payment in the Payment list, then wanted to connect that payment to a registration fee in Course Registrations, they could not do this. Once it was saved to the database, there was no option to connect a payment from the Payment list to Course Registrations.

In this release of Sumac, we have resolved this! New “Connect” and “Disconnect” Payment buttons allow users to connect a payment from the Payment list to a Course Registration. Users will see these buttons in the Course Registrations > Payment Status window.

Statement of Account for Belcher, Tina

Filter by Date: [] to []

Charges

Highlight charges for this contact: Belcher, Tina

Δ Contact	Δ Date	Δ Details	Δ Total	Δ Paid	Δ Balance Owed	Δ Allocated Amount
Belcher, Gene	2020-01-21	Baking Arts	678.00	678.00	0.00	
Belcher, Louise	2020-01-21	Baking Arts	678.00	678.00	0.00	
Belcher, Tina	2020-04-21	Baking Arts	10.00	10.00	0.00	

Amount Owed: 1,366.00 Amount Owed: 1,366.00
Payments: 1,416.00 Allocated: 1,366.00
Net: -50.00 Net: 0.00

Payments

Click to select a payment to see and change its allocation to registrations.

Date	Total	Allocated Amount	Unallocated Amount
2020-01-21	50.00		50.00
2020-01-21	1,356.00	1,356.00	
2020-04-21	10.00	10.00	

New Allocate **Connect Payment** **Disconnect Payment** Report Close

Universal import supports importing communication records

In previous releases of Sumac, Universal Import supported the ability to import contact and donation data only.

In this release, we have expanded this to allow the import of communication data as well. If you are using external communication tools, or even external tools for things like selling tickets and recording event attendance, you can use Universal Import to make your import template and bring this data into communication records quickly.