



Version 4.5.18 Release Notes

Aug. 25, 2021

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Introduction

This document describes the changes made to release 4.5.17 of Sumac to create release 4.5.18.

Improved Personalization Features

We've made it easier to personalize Sumac for your organization.

Preferences Tab Cleanup

We've reorganized the Preferences area to make it easier to find what you're looking for and focus on what you want to adjust.



New "Pronoun" field in Contacts' Basic Tab

We've added a new field to the Basic Tab in Contact records to let you record your contacts' preferred pronouns.

Δ User Type	Δ First Name	Δ Pronoun	Δ Last Name	Δ Age	Δ Campaign of Las
▽	Leslie		Berger	89	
▽	Jim	he/him	Stevenson	84	
▽	Windy	they/them	Browne	51	
▽ Case Worker	Shauna	she/her	Gipson	73	
▽	Susanne		Bender	72	
▽	Elaine		Davenport	82	

Improved Automatic Renewals for Memberships

In our last release, we introduced a new feature that allows your members to request that their memberships be renewed automatically after they expire. This is a great way to improve your membership retention, and provide more convenience to your members.

In this release, we've improved the auto-renewal feature to make it easy for you to see which memberships are eligible to renew automatically. For example, Sumac will check to make sure that the payment type is appropriate to use for auto-renewal, the membership end date is in the future, and the membership is not cancelled.

If any memberships aren't eligible to be renewed automatically, Sumac makes it easy for you to see why.

Member Name	Membership Type	Start Date	End Date	Payment Date	Member Since	Renewal Complete	Auto-Renew	Auto-Renewable Status
Addison Household	Associate Membership	2021-05-26	2022-05-25	2021-05-26	2021-05-26		Yes	payment type for total amount is not credit card
Alvarado, Mrs. Alpha	Student Membership	2021-05-28	2022-05-27	2021-05-28	2019-02-05		Yes	payment type for total amount is not credit card
Mendez, Ms. Ok	Individual Membership	2006-01-26	2007-01-25	2006-01-26	2006-01-26	Yes		payment type for total amount is not credit card
Gunn, Mr. Craig	Student Membership	2006-01-26	2007-01-25	2006-01-26	2006-01-26			and date has passed

Popular Features Expansion

We've made these popular features available in more areas of Sumac.

Send Email from Forms

In this release you will notice the Send Email function has been added in the Forms add-on.

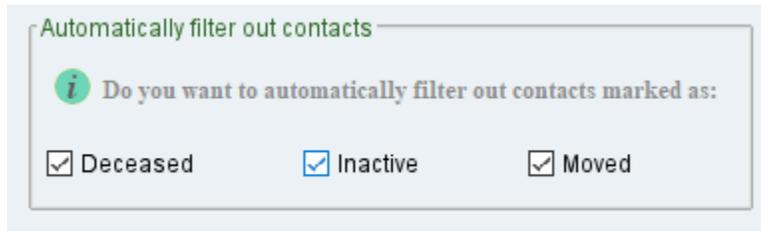
Volunteer Sign-up Forms [support@sumac.com]

The screenshot shows the 'Volunteer Sign-up Forms' interface. On the left is a sidebar menu with the following items: New (Ctrl N), Delete, Export, Print, Show Contact(s), Mailing (with a dropdown arrow), Mail Merge, Mail Merge Codes, Send Email (highlighted with an orange box), and Analyze & Report (with a dropdown arrow). The main area on the right contains a search filter section with 'Search Type: Show All' and 'and this contact: - is in this group: Group Type'. Below this is a table with two columns: 'Volunteer Sign-up ...' and 'Contact Name'. The table contains two rows of data.

Volunteer Sign-up ...	Contact Name
220	Berger, Dr. Leslie
319	Abel, Ms. Maudie

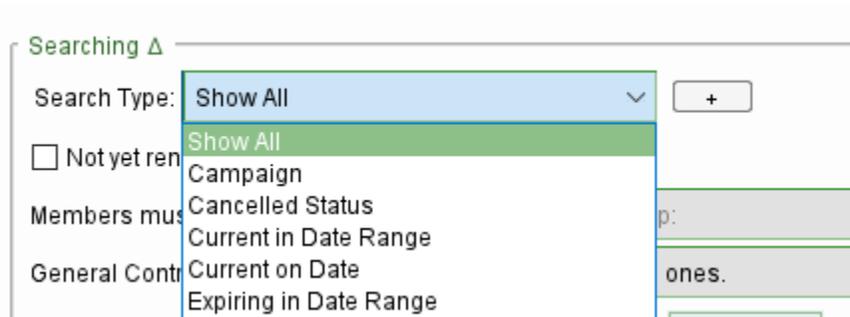
Mailing List Filtering

We have also provided improved filtering for mailing lists by adding the automatic filters to more areas of Sumac, like Course Registrations and Memberships. Now you can filter out Deceased, Inactive, Moved and any contacts who do not want to receive mailings whenever you are running mailings from these areas!



"Show All" Added to all Search Boxes

We have added the "Show All" search type to all areas of Sumac. This helpful search option has been implemented in all areas of Sumac to improve consistency, and to provide you with the most flexibility in retrieving your data. You will see the "Show All" Search Type has been added to : Communications, Invoices, Payments, Reminders, Ledger Entries, Volunteer and Staff Tasks, Time Dockets, Sales, and Course Registrations.



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.

"Campaign of Last Donation" column correction

This release resolved an issue when displaying the "Campaign of Last Donation" column in Contacts. If there is no campaign associated with the donor's last donation, the column will be left blank.

Δ User Type	Δ First Name	Δ Pronoun	Δ Last Name	Δ Age	▼ Campaign of Last Donation	Δ C
▼	Chet		Roark	52	2015 Foundation	
▼	Jayson		Newell	74	2015 Foundation	
▼	Taylor		Voss	55	2015 Foundation	Gov
▼	Amalia		Cantu	46	2015 Endowment	Pas
▼	Lucila		Stinson	89	2015 Endowment	
▼	Freda		Gilmore	49	2015 Endowment	
▼	Shelton		Franks	67		Clie
▼	Ginger		Quintero	73		Clie
▼	Clifford		Milligan	85		
▼	Val		Mcintosh	89		Clie

Improved template selection for automatic confirmation emails

In previous releases, users struggled to select the correct confirmation email templates for donations received via Sumac online donation pages. In this release, we added a dropdown menu for choosing the confirmation email template in Preferences > Donations tab to make it easier to select the correct template.



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

Option to cancel long running searches

When running a search that will find a large number of records in your database, Sumac may need to take a very long time to complete the search and present you with the results. This was becoming frustrating to users, as Sumac appeared to be frozen or stuck trying to finish searching.

In this release, we have added a new alert message to users running large searches. Now, Sumac will let you know when it is conducting a very large search that may take a long time. This new message also provides you with the option to continue with the long running search, or cancel the search so you can narrow your scope and continue using Sumac.