



## Version 4.5.14 Release Notes

August 26, 2020

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## Introduction

This document describes the changes made to release 4.5.13 of Sumac to create release 4.5.14.

## 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.

### *Sumac Stalling Issues*

In past versions, Sumac was stalling on two distinct operations. The first occurred in the Memberships list when users attempted to sort the list using the Membership Type column. The second occurred occasionally when users attempted to open contact records for contacts who had an associated Pledge.

In this release of Sumac, both issues have been corrected, and users should not notice Sumac stalling on either of these common operations.

## New Sumac Web Form Features

In our 4.5.12 release, we introduced the foundation for a new era of Sumac Web Forms, starting with a new Online Donation Form integrated with iATS payment processing. In our 4.5.14 release, we have enhanced the capability of Sumac Web Forms to collect more data from donors, and allow for more customization of the options presented to donors.

### **New Features!**

#### *Ability to control Giving Levels*

You can now specify your own pre-defined giving levels for any donation form, including amounts and text descriptions! Each giving level is displayed as a button for donors to click and select the giving level for their donations.

## Enter Your Donation Details

**Donation Amount** *(required)*

**\$25 - Jump**   **\$50 - Leap**   **\$100 - Launch**   **\$200 - Blast Off!**

Other (\$)

**In Recognition of**

**Fund**

None

*Allow donors to choose a Fund for their donation*

Donors can now select a Fund for their online donation! This is displayed as a drop-down menu on the Sumac Web Form, and is populated with Funds from your Sumac database that are set to "Show on Web." When donors select a Fund for their online donation, Sumac captures this in the Fund field of the donation record.

## Enter Your Donation Details

**Donation Amount** *(required)*

**\$25 - Jump**   **\$50 - Leap**   **\$100 - Launch**   **\$200 - Blast Off!**

Other (\$)

**In Recognition of**

**Fund**

None

None

**Area of Greatest Need**

Capital Campaign Fund

Education Fund

Research Fund

Sunny Summer Program

*Allow donors to make Honorary or Memorial donations*

Sumac Web Forms now supports donations made in recognition of someone (e.g. In Honour, or In Memory). This is displayed as a large text box, allowing a donor to list the full name, and/or a brief recognition message while making their donation. When donors indicate a recognition contact for their online donation, Sumac captures this in the In Honour Notes field of the donation record.

## Enter Your Donation Details

Donation Amount *(required)*

\$25 - Jump

\$50 - Leap

\$100 - Launch

\$200 - Blast Off!

Other (\$)

In Recognition of

Fund

None



### *Assign Campaigns to Sumac Web Form Pages*

Sumac Web Forms can now be assigned to a Campaign! If you have Campaigns defined in your Sumac database, you can create a distinct Sumac Web Form associated with a Campaign. When running a mailing or other fundraising effort for that Campaign, you can direct donors to the Sumac Web Form for that Campaign. Any donations made through that Web Form are automatically associated with that Campaign when they are imported into Sumac.

This allows you to analyze the donations generated from that Campaign (e.g. total number of donors and donations, total amount, number of new donors, etc.), saving you time and making it easier for you to track the success of your Campaign fundraising efforts!

### *Automatically email donors a payment receipt*

Sumac Web Forms will now send donors a payment receipt by email automatically at the time they make their donation. In previous versions of Sumac Web Forms, no email was sent to the donor at the time of their gift. Instead, the thank you email was sent to donors whenever a user imported Sumac Web Form donations into their database.

It is important to make sure donors receive immediate confirmation of their gift, so our 4.5.14 release introduces the ability for Sumac Web Forms to send a payment receipt to donors as soon as they make their donation. This email acts as a payment receipt so that the donor knows their gift was made successfully. Sumac will still send your personalized thank you email at the time that donations are imported from the Sumac Web Forms into your database.

The content of this payment receipt email is standard, but allows for some customization, like defining the subject line of the email, and the reply-to address that is displayed in the body of the email.

Thanks for the donation Inbox x



**John Smith** <no-reply@silentpartnersoftware.com>  
to me ▾

09:49 (1 minute ago) ☆ ↶ ⋮

Hi John,

Thank you for your donation of \$5 to Demonstration Charity!

Please review your donation summary below:

Date: 2020-07-22 13:49:32  
Donation From: John Smith  
Donation Amount: \$5

We appreciate your contribution!

This email was sent on behalf of A Demo Charity via Silent Partner Software. Please do not reply to this email.

If you have any questions about your donation, please contact A Demo Charity at [give@democharity.org](mailto:give@democharity.org)