Version 4.5.16 Release Notes

November 11, 2020

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Introduction

This document describes the changes made to release 4.5.15 of Sumac to create release 4.5.16.

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.

Extended the automatic disabling for Auto-pledge processing feature

In past versions of Sumac, the Auto-pledge processing feature turned itself off after two (2) weeks of inactivity in a Sumac database. This meant that some organizations missed their pledge processing after not logging into the database for two weeks or longer.

In this release of Sumac, the time for the Auto-pledge processing feature to turn itself off has been extended to 90 days. If an organization has no database activity for 90 days or longer, Sumac will turn off the Auto-pledge processing feature to make sure no pledges are processed incorrectly.

Dashboard added to Sumac Console

New Feature!

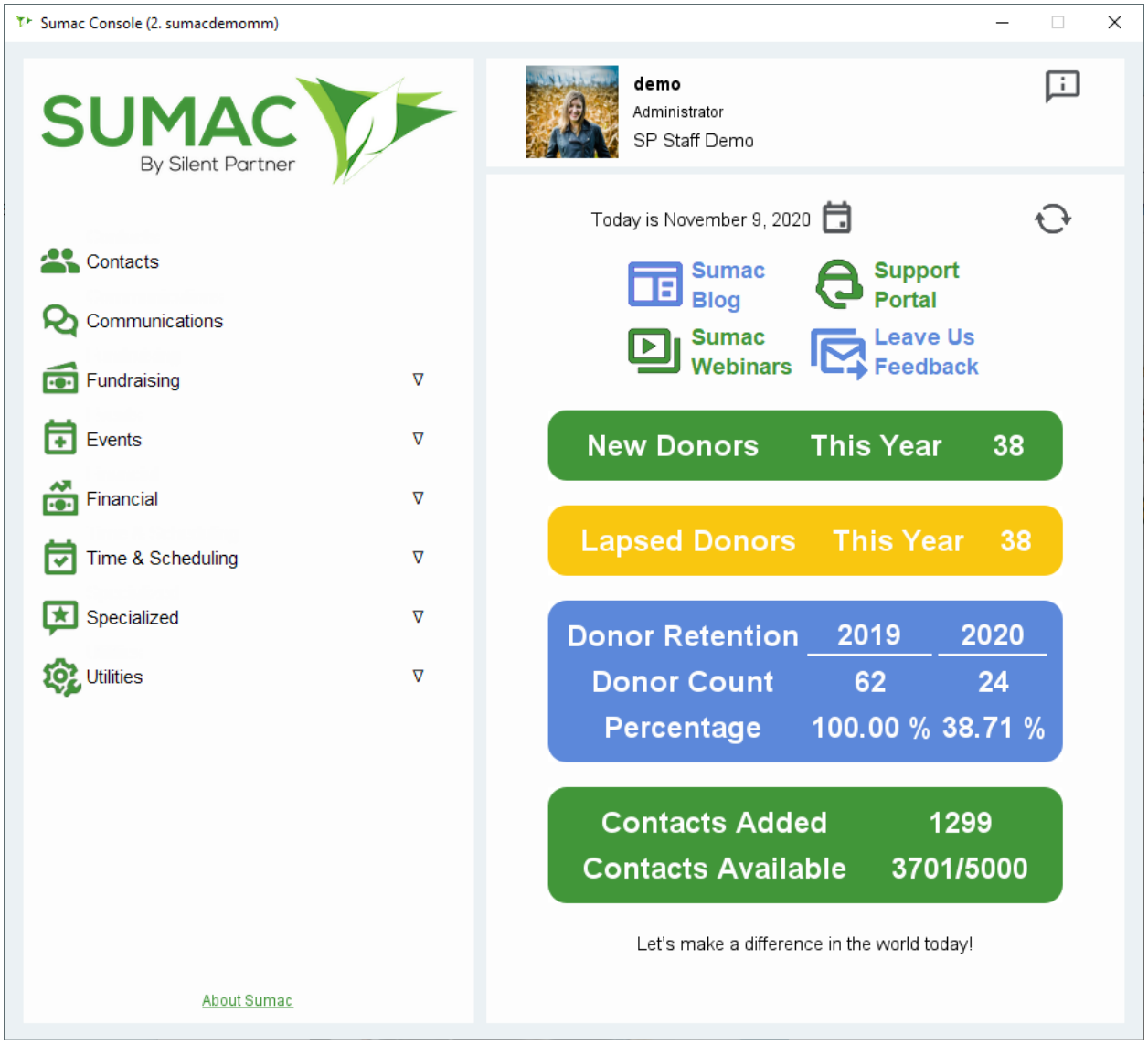
In this release of Sumac, we have introduced a new look to the Sumac console. Your Sumac console now shows a dashboard of key information from your database. In this first iteration, the dashboard shows you the following information:

- New Donors This Year - the number of new donors added to your database in the current year
- Lapsed Donors This Year - the number of donors in your database who gave last year, but not this year
- Donor Retention - a summary of the donors you retained from last year
- Contact Summary - the number of contacts currently in your database, and the amount of contact space remaining in your database before reaching your license limit

The Dashboard also now provides links to the Sumac Blog, Support Portal, a link to our upcoming Sumac Webinars (and recordings of previous webinars), and an opportunity to Leave Us Feedback and tell us about your Sumac experience.

Future iterations of the Dashboard will include more donor and donation statistics, memberships statistics, and information from other areas of your database.

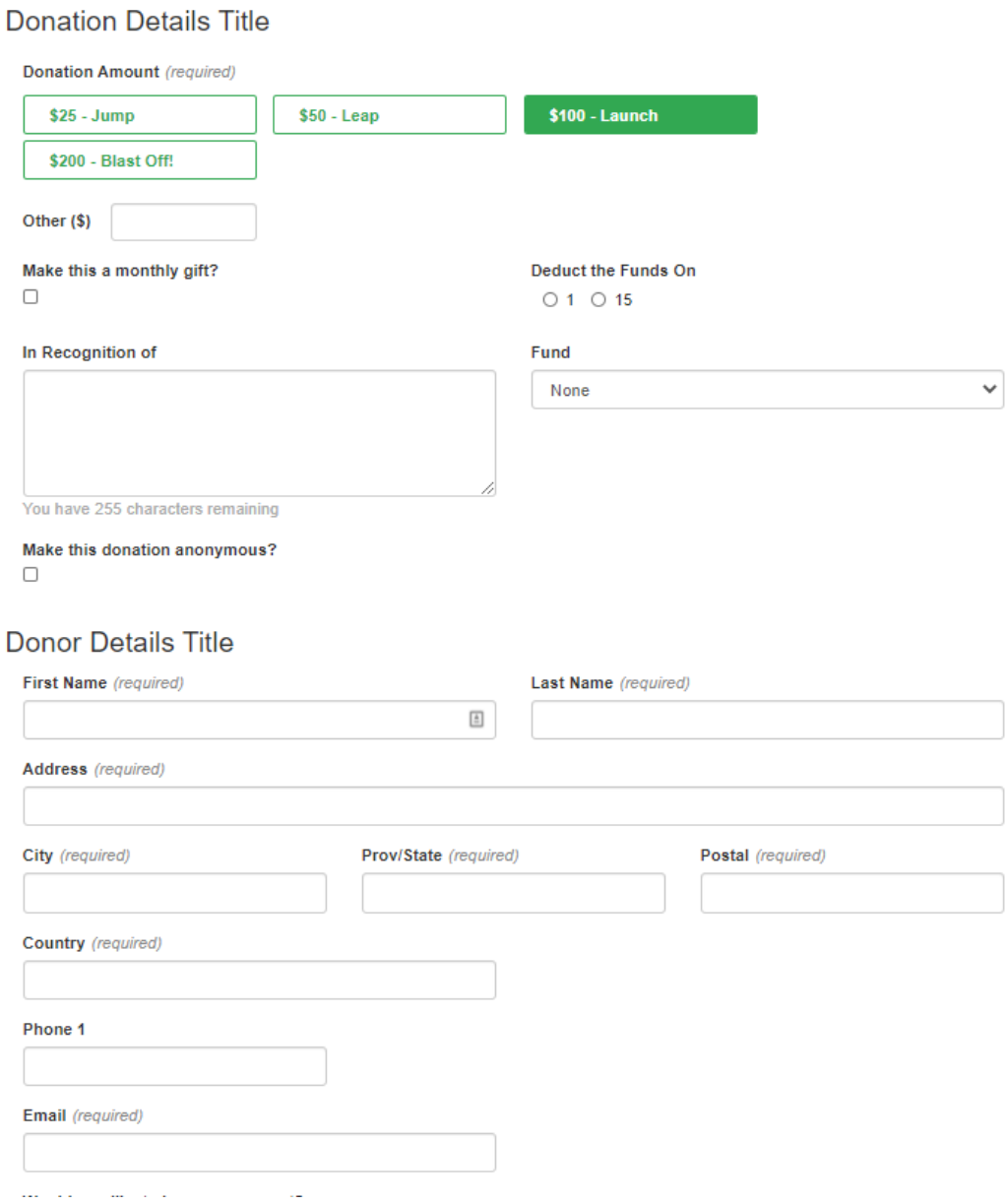
We hope you like the new look!


Sumac Console (2. sumacdemomm)
SUMAC
By Silent Partner
Contacts
Communications
Fundraising
Events
Financial
Time & Scheduling
Specialized
Utilities
About Sumac
demo
Administrator
SP Staff Demo
Today is November 9, 2020
Sumac Blog
Support Portal
Sumac Webinars
Leave Us Feedback
New Donors This Year 38
Lapsed Donors This Year 38
Donor Retention 2019 2020
Donor Count 62 24
Percentage 100.00 % 38.71 %
Contacts Added 1299
Contacts Available 3701/5000
Let's make a difference in the world today!

Exciting Improvements to Sumac Web Forms

Improvements to Sumac Web Form appearance

This release of Sumac Web Forms includes several small appearance enhancements, like rounded corners and colour upgrades for Amount buttons, improved field width display, and better presentation of mandatory fields.



Sumac Web Forms handles recurring donations with iATS

New Feature!

In previous releases, Sumac Web Forms supported only one-time donations. Donors making donations through a Sumac Web Form did not have the option to sign up to make monthly contributions to your organization. In this release of Sumac, our Sumac Web Forms, along with iATS Payment Processing, now supports the ability to make a one-time gift, or sign up to be a monthly donor.

When donors choose to "Make this a monthly gift," Sumac will save a Pledge record in your database to ensure that the donor's monthly contribution is processed each month. Note that this feature requires the Pledges add-on.

To sign up for Sumac Web Forms, please complete this form to get started!

Sumac Web Forms integrates with Stripe for one-off donations

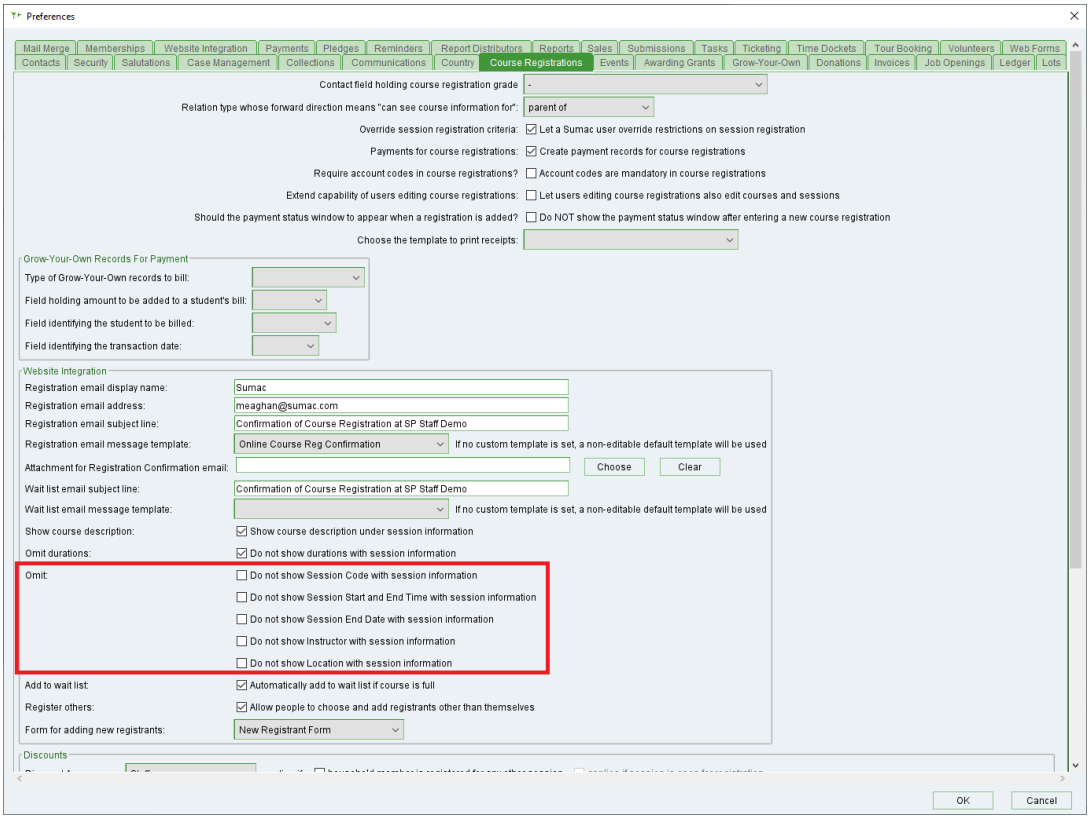
New Feature!

In this release of Sumac, we have introduced a new payment processor exclusively for our new Sumac Web Forms! Clients who are interested in using Stripe as their payment processor can do so through the new Sumac Web Forms for one-time donations.

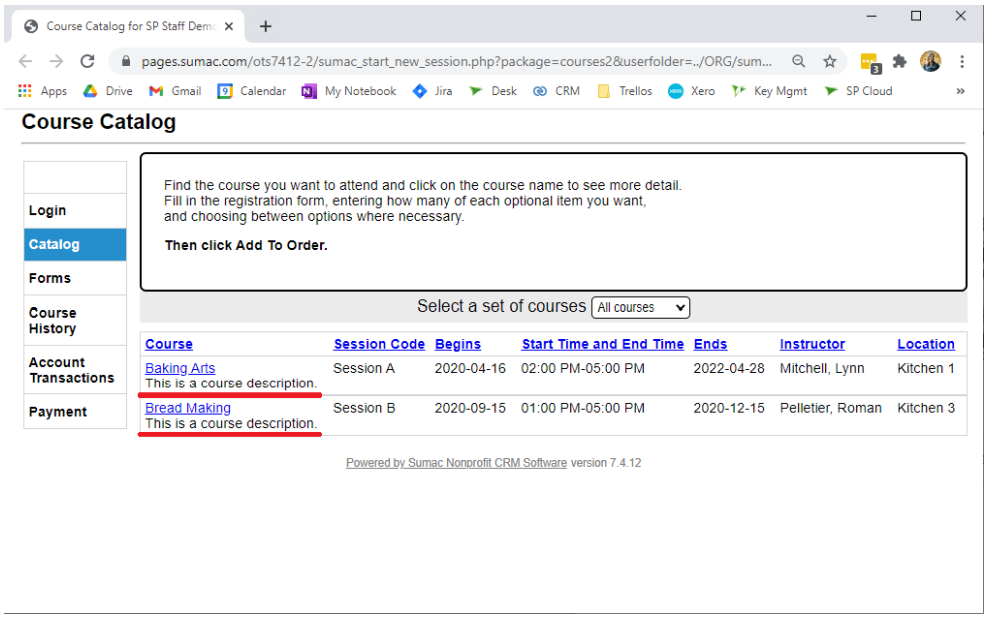
To sign up for Sumac Web Forms, please complete this form to get started!

New Control for showing columns in online Course Registration catalog

In this release of Sumac, we added new preferences that allow each organization to choose the columns to show in their Sumac online Course Registration Course Catalog. In addition to choosing whether to show a Course Description or Session Duration, users can choose to show or hide the Session Code, Session Start and End Time, Session End Date, Instructor and Location.



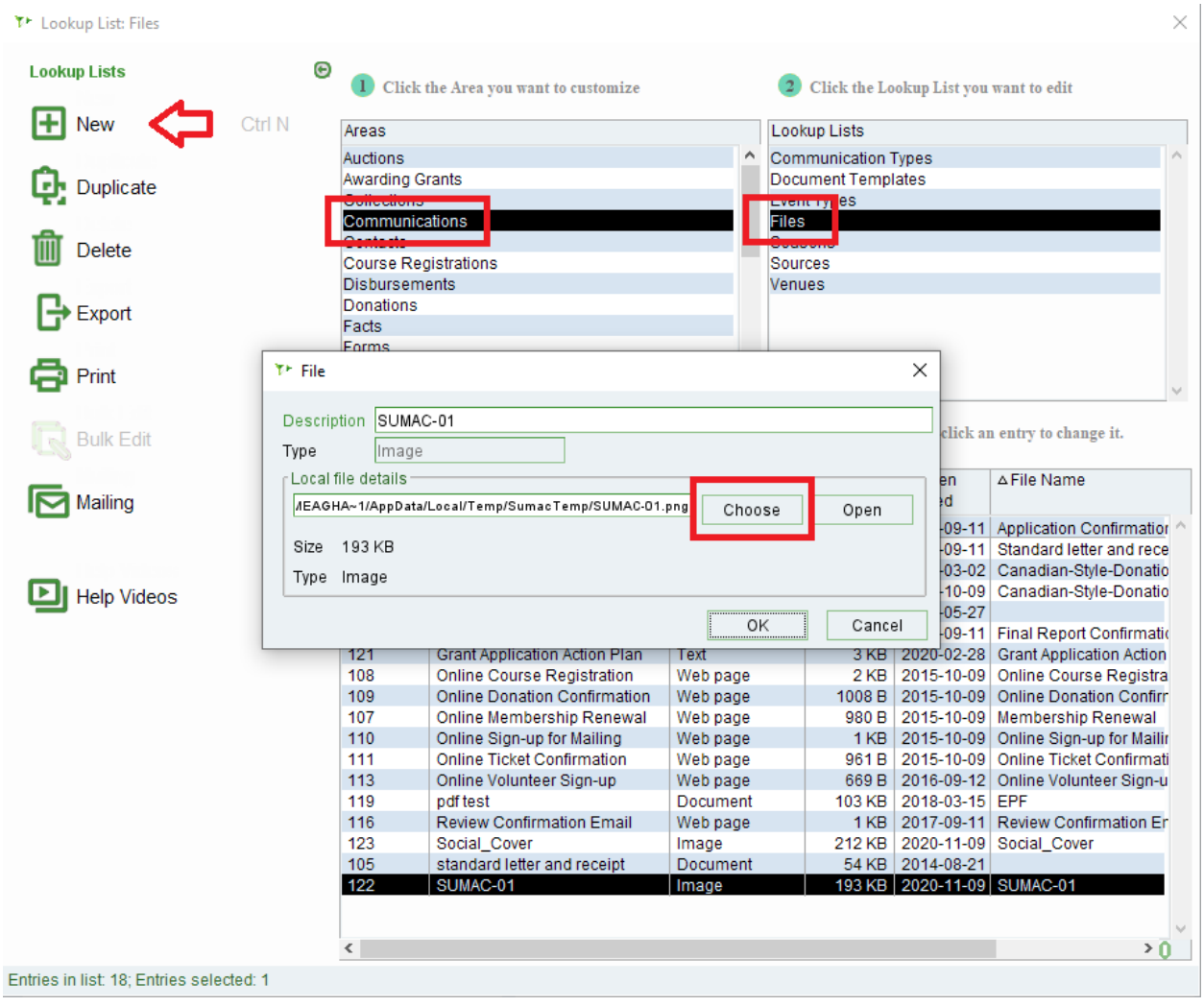
We have also improved the presentation of the Course Catalog columns and Course Description.



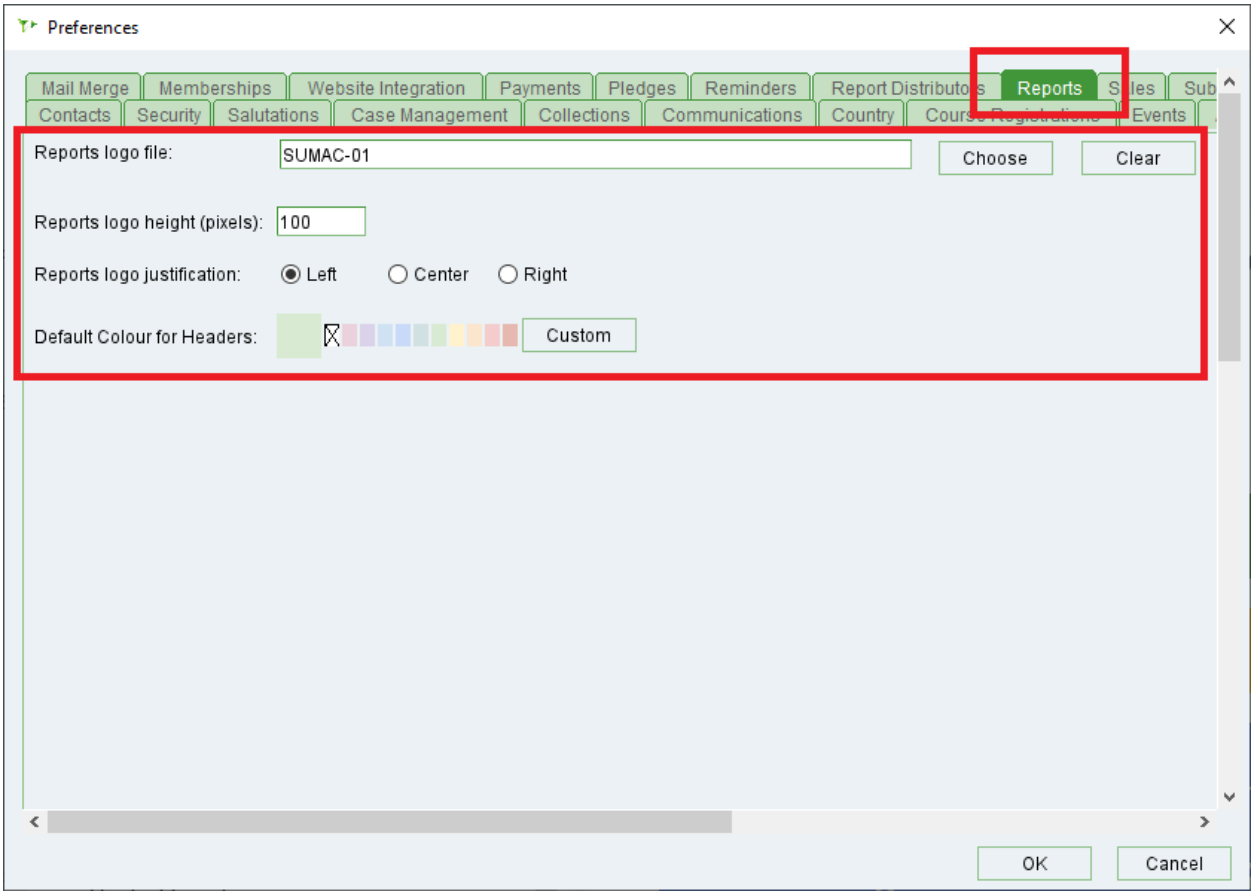
Personalize Reports with your logo and colour

In previous releases of Sumac, we have improved the appearance of Sumac's many built-in reports. In this release, we have continued this initiative by including the ability to include a logo image and/or select a colour to be used for header rows in built-in reports. This allows you to easily create beautiful, professional looking reports directly out of Sumac!

To add your logo, go to Utilities > Customize Database > Lookup Lists. Choose the Area: Communications, and choose the Lookup List: Files. Click New to add a new file and upload your logo into the database.



Once this is done, go to Utilities > Customize Database > Preferences. On the “Reports” tab, you can select your logo image, choose its placement on reports, and select a colour to be used for report header rows.



Donations By Account and Fund 2020-11-01 to 2020-11-30

Donations By Account 2020-11-01 to 2020-11-30

Account	Account Name	Receipt Amt.	Total Amt.
4520 Foundation/Grants	4520 Foundation/Grants	420.00	420.00
4510 Individual Donations	4510 Individual Donations	260.00	260.00
4560 Fund Donations	4560 Fund Donations	50.00	50.00
	TOTAL	730.00	730.00

Donations by fund: 2020-11-01 to 2020-11-30

Fund	Receipt Amt.	Total Amt.
Research Fund	50.00	50.00
No Fund Specified	680.00	680.00
TOTAL	730.00	730.00

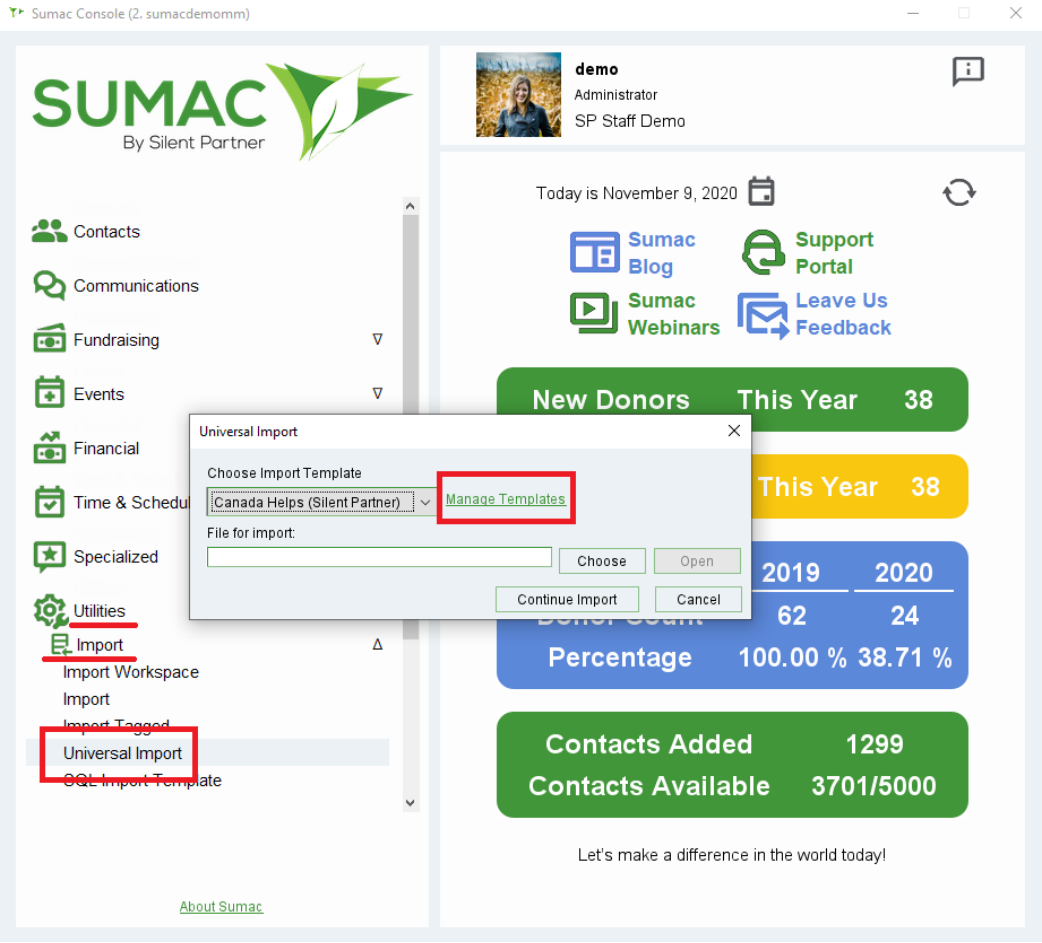
GRAND TOTAL: Number of Donations: 5; Receipt Amt.: 730.00; Total Amt.: 730.00

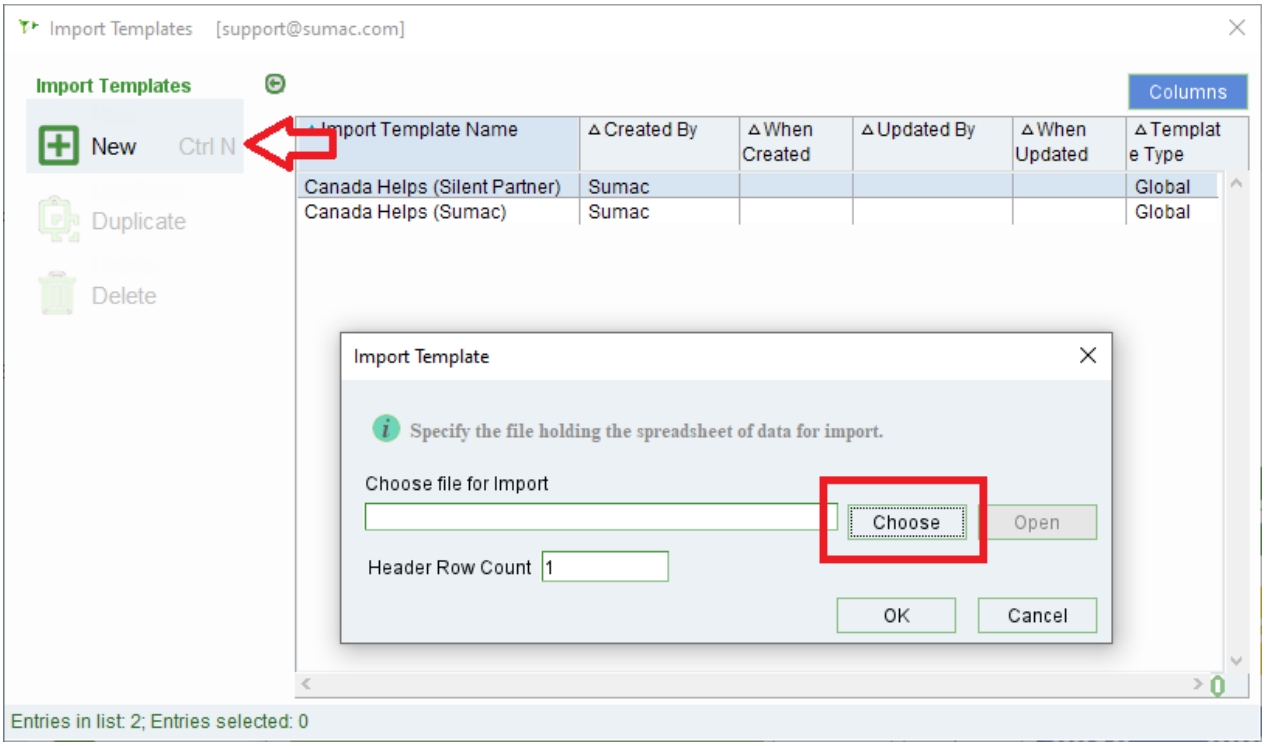
This report was created by **Sumac** for demo on 2020-11-09 at 16:59

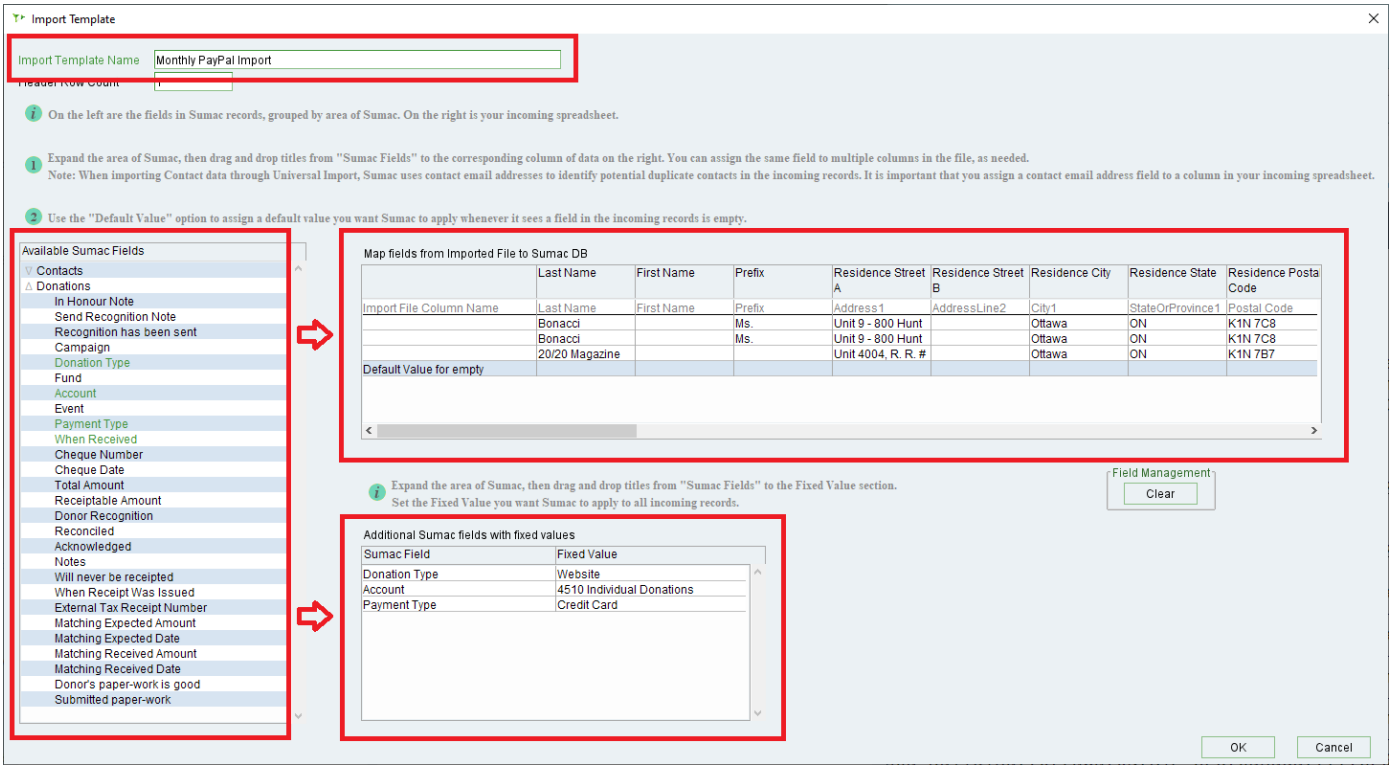
Universal Import supports adding new templates

In this release of Sumac, the Universal Import tool now allows users to create their own Import Template! If you use an external online donation collection tool (e.g. PayPal), you can download a report generated from your external tool, and use this report to create your own Universal Import template to tell Sumac what type of records to create, which field in Sumac is associated with each column in the report, and define any Fixed Values or Default Values, as needed.

Once saved, you can continue to use the Universal Import template you created whenever you need to import data from that external tool!

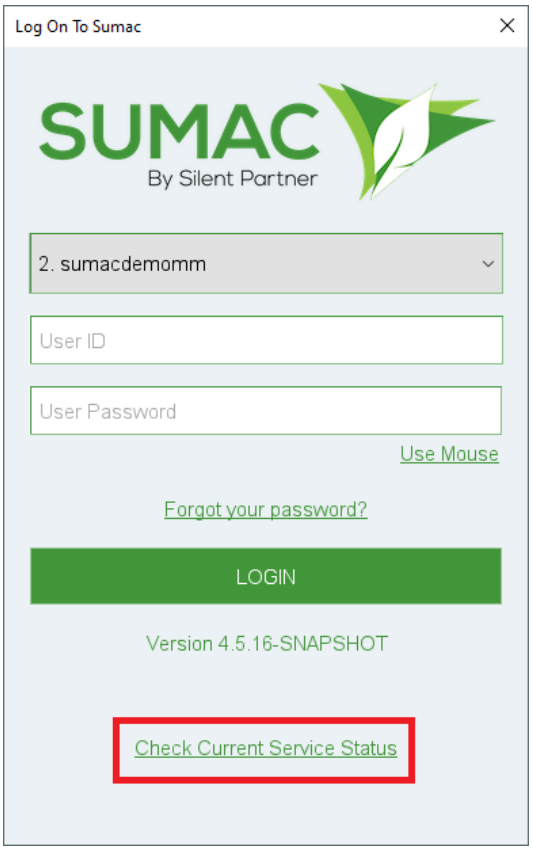


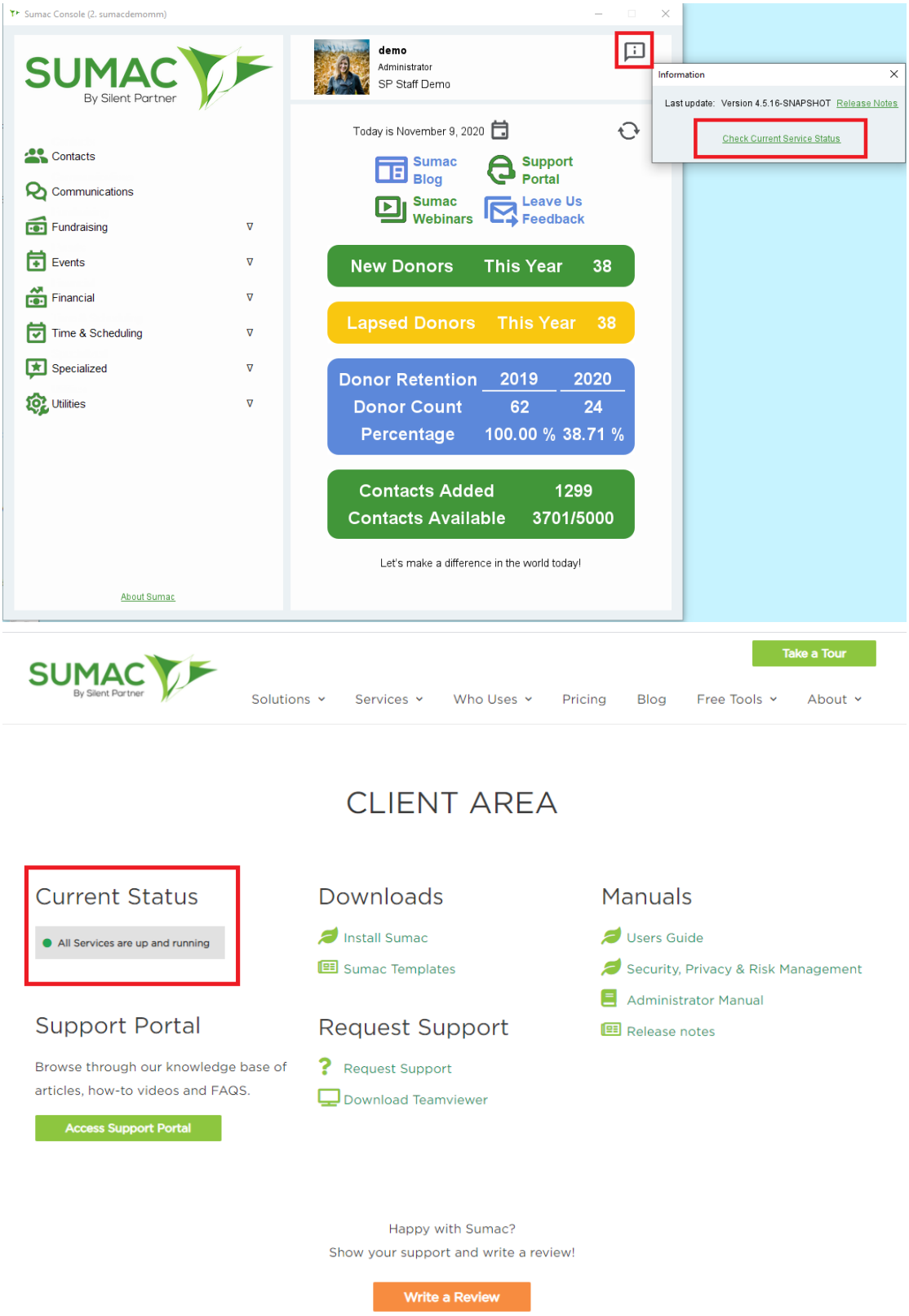

Import Templates [support@sumac.com]
Import Templates
New Ctrl N
Duplicate
Delete
Columns
Import Template Name
Created By
When Created
Updated By
When Updated
Template Type
Canada Helps (Silent Partner) Sumac Global
Canada Helps (Sumac) Sumac Global
Import Template
Specify the file holding the spreadsheet of data for import.
Choose file for Import
Choose
Open
Header Row Count 1
OK
Cancel
Entries in list: 2; Entries selected: 0


Import Template
Import Template Name Monthly PayPal Import
On the left are the fields in Sumac records, grouped by area of Sumac. On the right is your incoming spreadsheet.
Expand the area of Sumac, then drag and drop titles from "Sumac Fields" to the corresponding column of data on the right. You can assign the same field to multiple columns in the file, as needed.
Note: When importing Contact data through Universal Import, Sumac uses contact email addresses to identify potential duplicate contacts in the incoming records. It is important that you assign a contact email address field to a column in your incoming spreadsheet.
Use the "Default Value" option to assign a default value you want Sumac to apply whenever it sees a field in the incoming records is empty.
Available Sumac Fields
Contacts
Donations
In Honour Note
Send Recognition Note
Recognition has been sent
Campaign
Donation Type
Fund
Account
Event
Payment Type
When Received
Cheque Number
Cheque Date
Total Amount
Receiptable Amount
Donor Recognition
Reconciled
Acknowledged
Notes
Will never be receipted
When Receipt Was Issued
External Tax Receipt Number
Matching Expected Amount
Matching Expected Date
Matching Received Amount
Matching Received Date
Donor's paper-work is good
Submitted paper-work
Map fields from Imported File to Sumac DB
Last Name
First Name
Prefix
Residence Street A
Residence Street B
Residence City
Residence State
Residence Postal Code
Import File Column Name
Address1
AddressLine2
City1
StateOrProvince1
Postal Code
Bonacci Ms. Unit 9 - 800 Hunt Ottawa ON K1N 7C8
Bonacci Ms. Unit 9 - 800 Hunt Ottawa ON K1N 7C8
20/20 Magazine Unit 4004, R. R. # Ottawa ON K1N 7B7
Default Value for empty
Expand the area of Sumac, then drag and drop titles from "Sumac Fields" to the Fixed Value section.
Set the Fixed Value you want Sumac to apply to all incoming records.
Field Management
Clear
Additional Sumac fields with fixed values
Sumac Field
Fixed Value
Donation Type Website
Account 4510 Individual Donations
Payment Type Credit Card
OK
Cancel

Sumac Server Status now available to users

In this release of Sumac, we added new links for the current Sumac Server Status. At any time, users can view the current server status from the Sumac log-in window, or from the Notification centre in the top right of the Sumac console. Click the “Check Server Status” link to easily view the server status on the sumac.com website.




Sumac Console (2. sumacdemomm)
SUMAC
By Silent Partner
demo
Administrator
SP Staff Demo
Information
Last update: Version 4.5.16-SNAPSHOT Release Notes
Check Current Service Status
Today is November 9, 2020
Contacts
Communications
Fundraising
Events
Financial
Time & Scheduling
Specialized
Utilities
Sumac Blog
Support Portal
Sumac Webinars
Leave Us Feedback
New Donors This Year 38
Lapsed Donors This Year 38
Donor Retention 2019 2020
Donor Count 62 24
Percentage 100.00 % 38.71 %
Contacts Added 1299
Contacts Available 3701/5000
Let's make a difference in the world today!
About Sumac
SUMAC
By Silent Partner
Take a Tour
Solutions
Services
Who Uses
Pricing
Blog
Free Tools
About
CLIENT AREA
Current Status
All Services are up and running
Downloads
Install Sumac
Sumac Templates
Manuals
Users Guide
Security, Privacy & Risk Management
Administrator Manual
Release notes
Support Portal
Browse through our knowledge base of articles, how-to videos and FAQS.
Access Support Portal
Request Support
Request Support
Download Teamviewer
Happy with Sumac?
Show your support and write a review!
Write a Review