



Version 3.1 Release Notes

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Introduction

This document describes features which were added to version 3.0 of Sumac to create version 3.1.

Do You Need To Install This Release?

Check Your Current Release Number

Run your current version of Sumac. At the bottom of the Sumac Console window is a message that indicates which version of Sumac you are running.

Currently Using 3.1

If you are already using release 3.1 (on a pre-release basis, or because you just started using Sumac recently), then your software has already been updated automatically. You do not need to do anything to install this new release. But you should read the notes on the next page to learn about all the new capabilities of release 3.1.

Currently Using 3.0

If you are using release 3.0, then you should read the rest of this document and install the new release.

Currently Using Older Than 3.0 (2.4, 2.5)

If you are using an older version (2.4, 2.5) then you *must* upgrade very soon. We will not be able to support these old releases much longer.

Please let us know if you are in this situation and we will step you through the update process.

The change from release 2.x to release 3.x employs new installation and upgrading technology (as described in detail in the release notes for release 3.0) which makes future upgrades largely automatic.

Installation of This Release

Before Installing This Release

This release updates the structure of your Sumac database. *Ensure that your database is backed up before running this new version of Sumac.*

Installing This Release

Go to Sumac.com and click Support. Click “here” to install release 3.1. Click the appropriate “Install” for your computer.

The first time you log on, Sumac updates your database structure; this may take a few seconds, perhaps a minute, so wait while it is being done.

Auctions

Reports have been enhanced. There are several new searching criteria available in the Lots list.

Contacts

In the Contacts List, the number of months of data to show when a contact is expanded is now automatically remembered as a user-specific preference.

There is a Refresh button in the Contacts List. This button reloads all contact information from the database, so that it reflects the actions of other Sumac users who may be adding and deleting contacts.

In most contexts, when you are presented with the dialog for choosing a contact, you have the option of creating a new contact in the database.

See *Email* below.

Donations

When emailing a folder of receipts, Sumac allows you to select which ones you want to send instead of always sending all of them.

Email

You can use Sumac to receive email sent to specific email addresses. When it receives the email, Sumac can add the sender to a mailing list, remove the sender from a mailing list, record that the contact is (is not) attending an event, or respond with other appropriate information.

Beside each email address in a contact records, there is a small link icon. Click this link icon to simultaneously:

- (a) invoke your email program to compose an email to the specified address, and
- (b) create a Sumac communication record recording the email that was sent.

General

You can show Event Type as a field in the communications and donations lists.

In most lists, the appearance of column titles has been enhanced.

Multi-level sorts are now available in most of the major lists. When you click a column title to sort a list, the previously-clicked column is used as a secondary sort. For instance, to sort a list of conatcts by province and within each province by last name, click to sort by last name (the secondary sort) first, then click to sort by province.

In prior versions of Sumac, you could only delete a contact when all windows (except the contact list) were closed. Now you can delete a contact any time.

Ticketing

When selecting an event for a ticket, instead of a single long menu for event selection, now there is a two-level menu (event, date).

Time Dockets

A new report shows details of time docket, grouped by program.