

Sumac Release 3.2u



Version 3.2u Release Notes

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Introduction

This document describes features which were added to release 3.2p of Sumac to create release 3.2u.

General

Database Management

The creation and management of databases has been made more flexible and powerful. It now allows you to create additional multi-user (Sumac Gold) databases, create a single user (Sumac Bronze or Sumac Silver) database on your own computer, and create a single-user demo database on your own computer. This is all done by the Use New Database command in the Utilities menu in the Sumac console window.

Font Choices

On Windows, if you set Windows to use Large fonts, several fonts in the Sumac user interface become larger.

Labels

The dialog for printing labels has a drop-down menu that lets you choose how a contact's title should appear: on the same line as the contact's name, on a separate line, or not at all.

Mail Merge

Mail merge operations with PDF documents no longer require angle brackets << ... >> around the formulas.

Auctions

Many reports are enhanced to show additional details about donors and buyers.

Contact

General

There is a drop-down menu for choosing countries. There is a corresponding lookup list of countries.

If you select multiple contacts in the contact list, you can use the New drop-down menu to create a similar grow-your-own record for all the selected contacts at once.

In the Relations tab of the dialog for editing a single contact, there is a column that shows relation notes. These relation notes also show when you expand a contact in the list.

In the dialog for editing a single contact, the Copy To Clipboard buttons ask you what you want to copy (e.g. email, phone, website, postal address).

Search Builder

Search Builder allows you to negate (reverse) the results found by connector boxes. Formerly, reversing was supported by search criteria. This enhancement allows some searches to be done much more simply than they formerly could be.

You can specify criteria that search in club and school facts.

Contact List Builder

There is now a window for gathering together an arbitrary list of contacts. Use the Build Contact List in the Utilities menu to get the window. Then drag to it from the contacts, communications, or memberships list. This enables you to use the searching capabilities of all these lists to generate a list of contacts. You can also manually tune up the list (adding and removing as appropriate).

Donations

The work process for emailing electronic receipts has been simplified. In particular, if you try to email a receipt and cannot, it is now straight-forward to print the receipts and general paper mailing labels for them.

Fund Requests

You can define a budget that indicates how funds from a fund request will be spent. You can also identify expenses against the budget items.

Grow Your Own

The dialog for editing a single grow-your-own record now remembers where it was on the screen, and also its dimensions. So if you have long text fields, you can grow the window and see more of their contents at once.

Import Workspace

This window, used to validate and reformat data prior to importing it into Sumac, has been extensively revised. It has several additional features enabling it to deal with many more common data problems. At the same time, several improvements to its user interface make it easier to use.

Sales

The report that shows sales of products now subtracts sales from the initial inventory position and shows the net on hand at the end of the time period.

Submissions (Auditions)

The Sumac import command is able to update submissions (auditions) that are already in the database. Formerly, it could only import new submissions. This enables a more dispersed process when evaluating submissions.

Tour Booking

A new field was added to each workshop to hold the number of participants other than students.

There is tighter integration between tour booking and fund requests: you can allocate part of the cost of a program to a fund request budget item.

The Involved Contacts list window allows you to show several additional fields: workshop start and end time, arrival and departure time, and time worked. The status bar at the bottom of the Involved Contacts list window shows the total of the time worked.

Ticketing

The printing of tickets is done more like the printing of labels. This enables you to print tickets on a greater variety of paper stock, e.g. business cards, stock with rows and columns of perforated tickets, etc.

You now have an option to print tickets without printing the receipt portion. Since you can format a ticket to have the buyer's contact information on it, this may enable you to save paper.

The report that prints purchased tickets can now be sorted by either the name of the ticket buyer, or by the seat number.

Volunteers

The tasks list lets you search by task type.