



Version 3.4b Release Notes

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Introduction

This document describes features which were added to release 3.4a of Sumac to create release 3.4b.

Contacts

Search Builder allows you to search for contacts based on those who made receipted or unreceipted donations.

When you create a relationship between two contacts, you can copy the contact types from one of them to the other.

Donations

Cancelled donations are displayed in grey in the donations list.

You can display donation batch information as columns in the donation list window.

There is a new report that shows donations in a date range with subtotals for each donor, sorted by donor name.

Email

There is a new window for analyzing email addresses – the Analyze Email Addresses command in the Utilities menu. It can find duplicates, and can look for email addresses in any email address field in a contact record.

You can attach any number of documents to outgoing bulk email. This was formerly limited to four.

Grow Your Own (GYO)

GYO records can now have up to 16 amounts (usually currency or tax rate numbers). Previous releases allowed only 8.

GYO list windows have a General Control, to modify search results. It works the same as the General Control for searches in the contacts list.

Payments

You can use Mail Merge from the Payments list.

Security

Sumac now supports enhanced password management options for increased security. There are three additions:

- a. Password aging: Force the user to change his or her password after 80 days.
- b. Prevent password re-use: Do not allow the user to use one of the last five passwords used.
- c. Lock a user ID after five unsuccessful log-in attempts.

This enhanced security is optional and can be turned on using the Administrator Preferences command.

Website Support

In prior releases, Sumac's real-time website support provided the ability to run your box office, or accept donations online. It has been extended to allow your contacts to update their address and email information. The next web feature (in a few weeks) will be the ability for contacts to renew their memberships online.

Windows Fonts

When Windows is configured to use "Large Fonts", Sumac adjusts its fonts appropriately.