



## **Version 3.5.4 Release Notes**

October 4, 2011

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## Introduction

This document describes features which were added to release 3.5.2 of Sumac to create release 3.5.4.

## Appearance

This release continues the process of enhancing the appearance of Sumac. In addition to prettier buttons, most frames around areas of the windows now have rounded instead of sharp edges. This gives a somewhat more open feel, but takes very little additional space.

The most significant appearance change is in the Communications list. Its searching takes up less space, is more powerful, and cleaner in appearance. This is described below. **We really want your feedback on this new feature. If you think this is a helpful approach, we will extend this style of searching to other list windows in Sumac.**

## General Usability

When a database connection is lost, Sumac is usually able to recover and reconnect automatically.

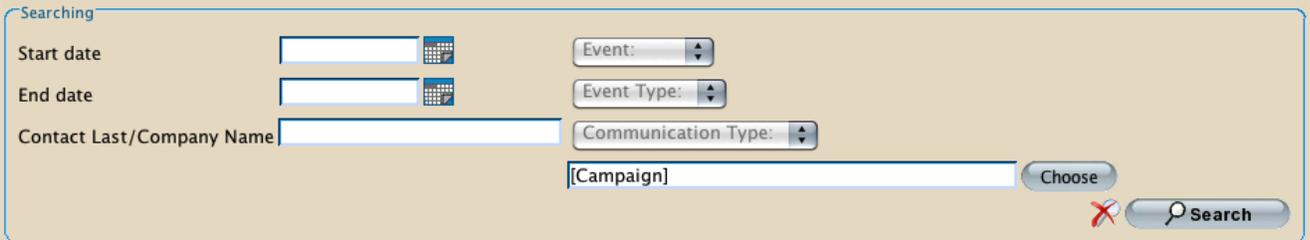
## Auctions

There is a new auction check-in and check-out process. This provides for “night of” support. It lets you check in bidders, perhaps taking their credit card numbers and assigning them a paddle number. During the auction it lets you assign lots to bidders by simple drag and drop operations. At the end of the evening, you can check out bidders, optionally asking for an additional donation, and processing their credit card payments.

Here, briefly, is how it works: When you click to view the Lots window, there is a new button: Auction Attendees. This button gives you an additional list where you can enter people attending the auction. When one of the people succeeds in a bid, you drag and drop the lot from the lots list onto the bidder in the Auction Attendees list window.

## Communications

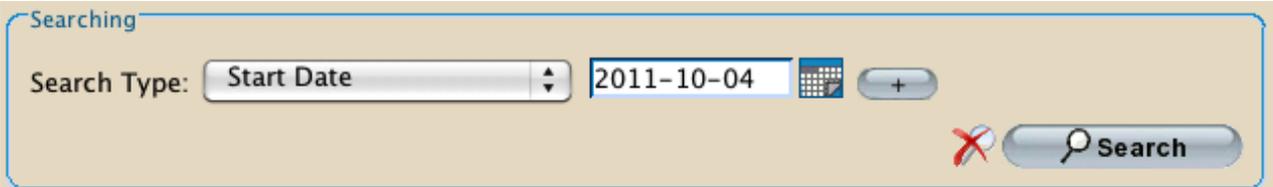
The searching panel is simpler, smaller, and more powerful. Here is what the search panel in the communications list *used to* look like:



The screenshot shows a search panel titled "Searching" with a light beige background. It contains several search fields: "Start date" and "End date" (each with a calendar icon), "Event:" (a dropdown menu), "Event Type:" (a dropdown menu), "Contact Last/Company Name" (a text input field), and "Communication Type:" (a dropdown menu). Below the "Communication Type:" dropdown is a text input field containing "[Campaign]". To the right of this field is a "Choose" button. At the bottom right of the panel is a "Search" button with a magnifying glass icon and a red "X" icon to its left.

You could enter data into one or more of the seven search fields, then click Search. Sumac would find all communication records that satisfy all the search criteria that you specified.

The new searching panel looks like this:



The screenshot shows a new search panel titled "Searching" with a light beige background. It features a "Search Type:" dropdown menu set to "Start Date". To the right of the dropdown is a text input field containing "2011-10-04" with a calendar icon and a "+" button. At the bottom right of the panel is a "Search" button with a magnifying glass icon and a red "X" icon to its left.

There is only one search criterion: Start Date. But you can use the Search Type drop-down menu to change it to search for something else, like a contact's last name:

You can add additional search criteria by clicking the + button:

Note that when you do this, buttons labelled “-” appear so that you can remove a search criterion too. Also, when there is more than one search criterion, there is a drop-down menu that shows *and* and *or* and lets you combine the searches together so that Sumac will find records that satisfy all of the search criteria (*and*) or at least one of the criteria (*or*).

For example, this search shows all communications of any one of three types:

The old searching panel would not allow this, because it only allowed you to specify one communication type. So, besides cleaning up the appearance of the searching panel, this new approach enables you to do searches that you could not do before.

*We would love to get your feedback: Love it? Hate it? Know how to improve it? Please let us know.*

## Contacts

Mail Merge to an RTF template can include people’s pictures.

Extra fields can show as long text, with a scroll bar.

If you export a list of contacts to a file, and export only columns that are showing in the contact list, then the export operation runs hundreds of times faster.

When creating a new search criterion in the Search Builder, only the types of searches that apply to your database are displayed.

## Course Registration

Attendance records can have notes.

The definition of a course can indicate how many credit hours a student receives.

Locked sessions do not appear in the course management window.

A user is warned on trying to register a student into a session which is at or over its capacity.

You can indicate the weight that each exam contributes to a final mark.

Each class can have a different teacher.

## **Donations**

You can search in the donation list by Payment Type.

## **Email**

### *Sending Email*

Sumac is more forgiving about SMTP server security certificates. For example, if the certificate from your ISP is self-signed, you will still be able to send email.

### *Receive Email Command*

There is now a button that lets you search to find emails with a specific piece of text in the body of the email.

### *Analyze Email*

The Analyze Email window now has a button to find and select pairs of duplicate email addresses.

## **Grow-Your-Own**

Formulas can be used to calculate the suggested value of a payment.

You can create Time fields which record a time of day. These are saved as a number which is the number of milliseconds past midnight relative to GMT.

GYO records now allow four more dates and 10 more flags. You can now have up to 15 (instead of 6) lookup lists in GYO records. The limit used to be 6.

Bi-directional linking is supported. If you have two different types of GYO records, and link one to another, the link can be made to automatically work in both directions. Not that this option must be turned on with the Preferences command in the Administrator menu.

The LI syntax in mail merge formulas can be used to produce reports about linked GYO records.

Long text fields now allow up to 20,000 characters (they were formerly limited to 2000).

## **Job Search**

There is a button that lets you show contact information for selected job candidates.

## **Reports**

The Donor Roll report now shows receipted amounts as well as total amounts.

The Info Details report in the contacts list shows receipted amounts as well as total amounts.

## **Sales**

The sales list allows you to show the amount paid and amount unpaid.

You can mark a product as inactive, so it no longer appears in the list of products that can be ordered.

## **Ticketing**

Ticket orders from websites can indicate a source code.

## **Tour Booking**

The Programs list allows you to search by booker and program name. Searching for Program is much faster.

The Mail Merge button in the Programs list asks which contact to use as the primary one.

Programs have several additional fields: load-in and load-out times, call time, day end time, lunch notes, and durations for driving to and from.