



## **Version 3.5.5 Release Notes**

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## Introduction

This document describes features which were added to release 3.5.4f of Sumac to create release 3.5.5.

## Contacts

The Set Values button in the contacts list supports setting the values of volunteer types, and also supports setting the Inactive flag.

## Course Registration

The Locked checkbox for sessions has been renamed to Locked/Inactive. In the main window for managing course registrations, if a course has no active sessions, the course does not appear in the list of courses.

It is now possible to import registrations and classes by identifying their related course name and session date. You can also import course attendance information.

Attendance statuses are now a lookup list, so you can have whichever ones you want (they were previously an unchangeable list).

There is a new report which shows class attendance.

## Donations

Donations have been extensively enhanced:

- The donations list includes much more powerful searching on a greater variety of information. In addition, you can search for donations made by contacts in a particular group; for example, you can create a group of all your board members, then find donations made by board members.
- Donation records allow you to specify a list of influencers – contacts whose influence resulted in the donation.
- Donation records support an in-honour notes field in addition to a link to an in-honour contact.
- Donation records support a recognition notes field in addition to a link to a recognition contact.
- Donation records support a recognition-sent checkbox to indication that the recognition contact has been informed of the donation.
- In previous releases, mail merge operations did not work with certain types of templates when only a single donation was selected. This problem has been fixed.
- The Explore Donations button works dramatically faster, especially when the connection to the database is a relatively slow (e.g. Internet speeds) link.
- The donation information in each contact's History tab shows the total donations made by the contact.
- When a donation is expanded under a contact, its note shows in addition to the other information that used to appear.

## Events

There are now five fields for recording expenses associated with an event.

The payments received for an event can be directed to the payment processor for a particular contact segment. When a database's contacts are segmented for different parts of the organization, this enables event revenue to be directed to a specific part of the organization.

If you have multiple payment processors defined in segments, you will be warned if you define an event without assigning a particular segment's payment processor to the event.

If a user is allowed to edit events, the preference that lets them edit price schemes and venues also lets them edit discounts and seat blocks.

## **General**

Sumac's default installation can now handle much larger databases. We have tested with 300,000 contacts.

## **Grow Your Own (GYO)**

GYO records now support up to 16 dates (formerly limited to 8).

GYO records now support up to 24 contacts (formerly limited to 8).

## **Labels/Envelopes**

When you print envelopes, you can specify which office's return address should be printed.

## **Mail Merge**

Formulas now support a function that returns the length of its string parameter. This enables mail merge operations to include or exclude paragraphs based on the presence or absence of textual, as well as numeric, information in the database.

## **Pledges**

You can display, as a column in the Pledges list window, the balance owed on a pledge.

## **Reminders**

The calendar view of reminders shows completed reminders in light grey, creating greater contrast with active reminders.

There is a Delete button in reminders being edited from the calendar view of reminders.

Holidays show in the calendar view of reminders.

## **Reports**

The Donations By Fund report excludes funds that have had no donations in the chosen time period.

There is a new report which shows class attendance.

## **Sales**

The date that a sale was paid can be displayed as a column in the list of sales. This date can also be used in mail merge operations.

## **Ticketing**

The last release of Sumac allowed the creation of packages: bundles of tickets, perhaps for a season, that could be sold as a group. This release allows ticket orders to include subscriptions – a purchased event package – as part of an order.

## **Time Dockets**

Search Builder now supports finding contacts based on their time docket.