



Version 3.6.2d Release Notes

2012-08-21

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Introduction

This document describes features which were added to release 3.6.2 of Sumac to create release 3.6.2d.

General

We have introduced expandable panels into the user interface. Expandable panels have titles at the top, and an expansion arrow that indicates if you can expand or contract the panel to show or hide its contents. These enable you to hide details that are not relevant to the task at hand.

Contacts

In the Contacts List, the New drop-down menu has been changed to a button. It presents a window with buttons (each of which has a keyboard shortcut) for creating different types of information.

Donations

When you enter a soft credit amount into a donation, if the total and receiptable amounts are not set, then they are automatically set to the soft credit amount.

When you enter a fund into a donation, if the fund is mapped to an account, then then account code field is filled in.

The donations list lets you search for donations that are cancelled or not cancelled.

Email

Anti-Spam Ordering

The window for sending email has a new feature: anti-spam ordering. This feature re-orders the emails being sent so that emails to one particular domain are separated as much as possible.

For example, if you have many emails in the gmail.com domain then, when you send your newsletter, if you send to several consecutive gmail.com email addresses, gmail.com may treat you as a spammer. This new feature arranges email addresses so that those being sent to gmail.com will be separated by emails being sent to other domains.

Please note: We do not condone spam, and do not want you to send spam. But if you are being unjustly classified as spam for this reason, then this new feature of Sumac will help you avoid this problem.

Importing Email Addresses

When you are importing a large number of contacts into your Sumac database, you may want to check to see if their email addresses are the same as email addresses of people already in the database. The Import Workspace now has an Email (Not Duplicate) command that lets you check to ensure that email addresses in your file are not already in the database.

Grow Your Own

Long text fields in Grow Your Own records can now contain formatted text, which is formatted with HTML codes.

Mail Merge

Sumac now can do mail merge directly with docx documents. Previous versions of Sumac could do mail merge operations using these types of files: plain text, rtf, html, and pdf. The docx format has several advantages for Word users:

a. it is more compact than rtf, so documents with pictures (e.g. an image of a signature) should not expand as much.

b. it is more convenient than rtf since you do not have to change the format of the document when you save it from Word.

Membership

You can now tell Sumac to treat the entire membership fee as a donation. This is done using the Administrator/Preferences command.

Previously, if you entered a new membership record with a fee of \$50 and an optional donation of \$25, Sumac would create a donation record for \$25. This new feature tells Sumac that you want both the \$50 and the \$25 to be treated as a donation, so the donation record would be for \$75.

Payments

You can now enter two digit years and Sumac automatically converts them to four digits.

Tasks

You can now click the Task Template button, converting a task to a template, or vice versa, whenever you need to.

There is a Set Values button in the Tasks list window.

Ticketing

When you are choosing an event, there are buttons for rapid date entry, so you can instantly see dates in a particular year, month, or date.

The window for entering and editing a single ticket order has an *OK & Print* button which saves the order to the database and prints it immediately. This is useful in a high-speed box office situation where every click counts.

Time Dockets

Time docket lists now have an extra field that allows you to specify the type of work that was performed.

The time docket list now has new-style searching, and also lets you specify that you want to find time docket lists for people in a particular group.