



## **Version 3.6.3a Release Notes**

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## **Introduction**

This document describes features which were added to release 3.6.3 of Sumac to create release 3.6.3a.

## **Communications**

You can now search communication records by the contents of their note fields.

## **Contacts**

You can now show the highest previous donation and the date of the highest previous donation as columns in the contacts list.

In the History tab, and when you expand a contact in the contacts list, additional information is displayed:

- a. When displaying a reminder, if it is a meeting then its start time is displayed.
- b. When showing a course registration, the end date of the session is displayed.

## **Course Registration**

Each session can specify up to four (formerly one) teachers.

A new report shows exam results for a specified time period.

You can now import exam results into your Sumac database.

## **Donations**

In the donations list, you can now search by the donor's first name. This is particularly helpful for organizations with many people with the same last name.

## **Email (Receiving)**

When you receive incoming email, the window for setting communication preferences allows you to select many contacts (emails) at once and set them in bulk instead of having to set them one at a time.

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

When defining a GYO field which is a schema, you can specify the default schema to be used when entering the GYO record.

When entering GYO records, there are buttons for clearing a payment, event, donation.

## **Ledger**

The Ledger Entries continue to be enhanced. Memberships and Ticket Orders can be automatically added to the Ledger.

Ledger Entries now automatically record the time when entered into the database and the time when updated.

To support more accurate ledger entries, account code fields have been added to discounts, session supplementary items, taxes (surcharges), and event packages.

## **Mail Merge**

When you use an RC formula to present information about related contacts, there are two new variables that let you generate information about the relationship itself:

- c\_relation – the name of the relationship
- c\_relation\_note – the note field in the relationship record

## **Memberships**

When defining a membership type, you can specify a donation amount that is automatically associated with a membership of the particular type.

Membership records are now summarized in the receipts journal report.

## **Payments**

For your convenience in reconciling your credit card processor's reports with your Sumac database, there is a "Reconciled" checkbox in payment records.

## **Reminders**

Reminders records now have a notes field in addition to the What To Do field.

## **Ticketing (Box Office)**

Sold Tickets report (in the Ticket Orders list window) gives you the option of including the ticket buyer's mailing address in the report.