



Version 3.6.4 Release Notes

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Introduction

This document describes features which were added to release 3.6.3 of Sumac to create release 3.6.4.

General – User Interface

The search panels, at the top of many list windows, are now collapsible. Click the title on the panel, and it shrinks, click it again to expand it. This lets you free up space to show more data records.

General – Online Transactions

The copy of Sumac that is serving transactions on your website can be told to reload configuration information from the database as frequently as you wish. It was formerly always reloaded every 30 minutes.

If you integrate your Sumac database with your website, you know that the online components are separate from each other: for example, buying tickets is one module and making a donation is another. This new release supports an additional different approach: there can be a common log-on, so a website user only needs to identify herself once, and there are navigation buttons to move immediately from one function to another without having to log on again.

Communications

Communications can be linked to a document in your file system.

Search Builder provides options for finding contacts with specific numbers of communications. For example, you could find contacts who have attended between 3 and 5 events in the last year.

Contacts

In the window for displaying and editing the details about a contact, there is a new tab: Summary. It summarizes all the information on all the other tabs, so you can see at a glance what is there. We find it useful, but if you don't, you can hide it (use the Preferences command in the Administrator menu).

Extra fields that are entered using a group of checkboxes now automatically sort the text field values in the order of the checkboxes.

Search Builder provides options for finding contacts with specific numbers of communications. For example, you could find contacts who have attended between 3 and 5 events in the last year.

Countries

In addition to Australia, Canada, and U.S. phone numbers, Sumac now also supports Mexican and U.K. phone number formats. Sumac also handles Australia, Canada, U.K. and U.S. postal code formats.

Course Registration

Exam results can be imported.

Search Builder allows you to search by course and by date range.

Extra items associated with sessions are now drawn from the list of products, so you do not need to redefine them for each new session.

Sumac now supports a waiting list of registrants for a course.

The Registration view of course registrations supports a report which shows all the classes taught by each teacher.

The Registration view of course registrations supports a report which shows forms that need to be filled out by registered students for a particular session, but have not yet been filled out

The window for creating and editing Registrations includes a list of the forms associated with the registration and lets you edit or fill out new forms.

The online (on your website) view of course registration supports a course catalog, registration, marks reports, and payment. The other two major components – an online financial statement and form filling – are partially supported.

Donations

The window for displaying and editing the details about a donation is greatly enhanced:

- it organizes its content more effectively
- it allows you to selectively hide information that is not of interest
- if you choose a Fund which allocates the donation to multiple accounts, the account distribution is automatically displayed
- if you are entering a new donation that is supposed to be allocated to multiple funds, you can specify the relevant funds without having to manually create one donation record for each fund
- in the Account drop-down menu, only credit accounts are displayed
- many other small simplifications have also been made.

The Search Builder search criterion that finds donors based on the amount of their donations can be directed to use the total value or the receipted value of the donations.

When you save a donation for a donor who has a pledge, Sumac now shows all the donor's pledges, instead of just ones in effect at the time of entering the donation.

You can mark donation types as inactive so that they do not appear in the drop-down menu when entering a new donation.

Email (Receiving)

The button for setting a communication preference for the contacts who sent you an email, can now set the communication preference in bulk instead of one at a time.

Email (Sending)

The window for sending bulk email has a test button. If you choose the template that constitutes the body of the email, then click the Test button, the button performs a mail merge operation on the template using the data for the first person in the list of recipients, and opens the resulting mail merge file to show you the result. Note that this button does *not* send an email: it just lets you view what an email might look like.

Fund Requests

Fund Requests can be linked to a document in your file system.

Grow Your Own (GYO)

A text field in a GYO record can now be entered using checkboxes.

You can now have up to 28 lookup list fields (formerly 15) in GYO records.

Searching is enhanced in several ways:

- In a GYO list window, the drop-down menu of field names includes the name of the tab that each field is on. This organizes the potentially long list of field names, making it easier to find the desired field.
- Similarly, in Search Builder searches for GYO records, the drop-down menu of field names includes the name of the tab holding the field.
- Search Builder searches for GYO records allow you to search by schema entries in addition to all the other types of supported field types.

- You can search by contact IDs as well as by contact names.

Job Openings

The list window showing job openings now positions the list of candidates on the right hand side, so it can be made taller to show more candidates at once.

Ledger

Ledger entries searching is considerably enhanced. They can be searched by several additional criteria.

Ledger entries support time stamps, accurate to within a second. So you can find entries between two particular moments.

The status bar in the ledger entry list window shows totals.

You can now “ledgerize” these types of transactions: course registrations, donations, fund requests, memberships, payments, pledges, and ticket orders.

Mail Merge

If you do a mail merge and ask Sumac to create communication records, it will automatically fill in the Event in the communication records, using the event defined in the source records (if there is one). For example, if you mail merge a list of donations, the communication records will refer to the same event as the donations.

Formulas that use *RC* to get information about related contacts separate the resulting fields using semi-colons. There is now a new variant, denoted by *RT* instead of *RC*, which separates the resulting fields using tab characters, which makes the resulting data line up into columns for use in a spreadsheet.

Memberships

If you use Sumac’s web-based membership renewal, there is now a preference that tells Sumac whether you what date to use for the start of the new membership: the end of the prior one, or the date of the renewal.

When you mail merge memberships, you are given the option of treating the member or the billing contact as the main contact.

Payments

The Mail Merge button in the Payments list window lets you group payment records by contact, so you can use formulas with *LI* syntax to summarize them in reports or produce detailed itemized receipts.

Pledges

When you calculate the amount owed on a pledge, you can do this calculation using either the receipt amount or the total amount in the donation records.

The “pledges active in a date range” report now includes amounts soft-credited to a pledge as well as amounts directly credited to a donor’s pledge.

Reminders

When you are working with a long action plan, and open a reminder, Sumac selects (highlights) the next step to be performed.

Security

Sumac can automatically track and record when a user changes or views a contact, donation, or Grow-Your-Own record.

Tasks and Volunteers

Tasks now appear when you expand a contact in the contacts list.

In the calendar view of the tasks list, there are drop-down menus for filtering to show only tasks for particular departments or programs.

Ticketing (Box Office)

The online ticketing module allows you to specify the background of selected ticket fields.

Price schemes now allow 16 discount levels (up from 10).

The standard list of label/ticket layouts includes a 1x1 portrait (5.5x2 inches) in addition to a 1x1 landscape format.

Ticketing on your website can now show an additional panel of variable information associated with a production.

Within a production, performances are listed chronologically.

You can set up a list of reports about different events and event groups, and a list of email addresses to send them to. Then, with a single click, you can generate and send all the specified reports.

Time Dockets

In the time docket list window, searching allows you to search for time docket for a particular group of clients in addition to the option of searching for workers in a group.

Reports allow you to restrict the data that is reported by contact types.