



Version 3.6.5 Release Notes

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Introduction

This document describes features which were added to release 3.6.4 of Sumac to create release 3.6.5.

General – User Interface

We have taken one more step in the evolution of Sumac’s user interface. You will notice that:

- the user interface has “lightened up”: buttons are not as dark, the background of windows is a very light grey
- buttons are more square rather than the (now somewhat dated) oval appearance
- column titles in scrolling lists indicate (with a hollow triangle) that they can be sorted, and full triangles indicate that they have been sorted
- more and more reports are being added to list windows throughout Sumac, rather than all in the Reports list, and these new reports are mostly produced as HTML which can then be pasted right into an email and forwarded to colleagues

Campaigns

The Campaign list window provides a report that shows drop-off from one campaign to another. You choose the campaigns of interest, and the reports shows various statistics about donations the campaigns.

Contacts

See *Search Builder* changes below.

Course Registration

Course registration and form filling work online.

Donations

When you create a payment associated with a donation, the date of the payment is the donation’s received date instead of the current date.

Donations can now hold a cheque date and a cheque number. You can search by the cheque number.

The Duplicate Last button in donations now duplicates batch information and influencers as well as other fields.

Before automatically setting a soft credit person from the donor, Sumac prompts the user to confirm the person about to be set and the relationship to the donor.

Email (Sending)

The dialog for sending emails has been slightly simplified.

Events

Event names can now be 80 characters long (formerly 40).

Ledger

You can search ledger entries by donation batch numbers.

Memberships

A custom layout can be used to print membership information in labels or membership cards.

Payments

The Payments list window has a report that summarizes payments by purpose.

Reminders

The What To Do field in a reminder can hold up to 510 characters (formerly 255).

Search Builder

There is a built-in slide-show tutorial that helps explain how to use Search Builder.

Searches for memberships can search for either the member or the billing contact.

A new search lets you search to find contacts whose *first* membership was in a specific time period.

Searches by tasks allow you to search by assignment status.

Ticketing (Box Office)

The Ticket Orders list window can show a report of ticket sales by city.

The box office can also send reports showing the status of sales. This can be completely automated (e.g. every morning at 2 a.m. send sales reports for selected events to a list of email addresses).

Time Dockets

The buttons that quickly enter times and dates have been moved and made smaller so they are beside the fields they relate to.

Time Dockets now support a Duplicate Last button for rapid entry.