



Version 3.6.5a Release Notes

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Introduction

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

General

When you Print a list of records from any window, the printed report shows the number of records printed, and also draws horizontal grey lines to make reading easier.

Additional subtle changes have been made throughout Sumac, as we continue to evolve the user interface. For a quick glimpse of the future, check out the Offices command the Administrator menu; it is not quite final, but it shows command buttons moved to the left, and tooltips being used to provide help. As always, feedback is appreciated.

Campaigns

The Pledges report that summarized donations by pledges and campaigns now shows donations to all the child campaigns of the selected campaigns.

Contacts

The Info-Details report in the Contacts list window has been completely re-written to:

- let you control what is in the report
- format the report as HTML so it can be embedded in emails
- include complete (instead of subset) communication notes

Let us know how you would like this report enhanced further.

Course Registration

This module can now provide extensive integration with websites.

There is a new report that summarizes students' marks and can calculate a final mark based on weighted exam results.

The Course View shows additional columns of information about the courses.

A Preference setting allows you to tell Sumac whether in-house users of Sumac should or should not be able to exceed the maximum number of registrants to a course.

This module supports assigning specific payments, or portions thereof, to specific registrations.

Attendance Statuses can be marked as *Don't Count* to indicate that attendance of a particular student at a class should not count in statistical summaries. Attendance Statuses can also be marked as *Inactive* to indicate that they should not be used anymore.

Grow-Your-Own (GYO)

The GYO list now supports much more powerful searching, like other lists.

GYO records now have a Duplicate Last button for rapid data entry.

GYO records can now link to a membership record.

GYO records can now link to up to four payment records (formerly limited to one).

Mail Merge

You can mail merge using a PDF template and tell Sumac to *not* encrypt the output documents. This may be needed for post-processing of the merged documents.

A new variable, `__licount`, lets you create a report that shows the number of listed items. This allows you, for example, to create a report showing how many clients each case worker is supporting in a time period.

Payments

Sumac supports a new payment processor: Vanco Services.

The payment transaction log supports a command for deleting old entries from the log. It does not allow you to delete anything less than 90 days old.

Reminders

Reminders now track the user who added the reminder to the database.

Tasks and Volunteers

Tasks now support colour coding: you can indicate a colour to be used to display a task.

A new button in a task enables you to fill the Location field from the client's contact record.

You can create several repeating or recurring tasks all at once.

Tasks support an additional start time. This is useful for situations where a preparation task (e.g. meet at a certain location) needs to be done before the main task.

The Calendar View of tasks lets you specify that you want to see tasks for one or more specific programs (formerly allowed only one program).