



Version 4.0 Release Notes

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Introduction

This document describes features which were added to release 3.6.5d of Sumac to create release 4.0.

General – User Interface

The user interface is completely updated. For a video about these changes, view:

<http://sumac.com/transition-to-sumac-4>

General – Database

The way unique id numbers are assigned to records being inserted into the database has changed to be about twice as fast so adding any type of new data to the database is faster.

Collection Objects

You can now import collection objects.

Collection objects now show in the contacts list when you expand the object's donor.

The collection objects list provides several additional search types.

Collection objects include a new field: the de-accession date. Objects that have been de-accessioned appear grey in the collection objects list.

Contacts

The History tab contents can be sorted by record type and by date.

Irish phone numbers are supported.

The contact detail report has been enhanced:

- the full content of communications is displayed.
- postal addresses are now optional
- it shows the counts of each type of record being displayed.

When entering a contact's address, if you enter a postal code, Sumac looks it up in the database and fills in the city, state, and country from other addresses already in the database that have the same postal code.

Course Registration

Two new fields have been added to the definition of a session to support forecast or budgeted numbers of students and teaching hours.

Exams can have teachers.

When moving a student from one session to another, Sumac deals with differences in fees between the two sessions.

There are *many* new reports in the Registrations View.

There is a new payment allocation window that shows charges (registrations, optionally GYO records, and sales) and lets you allocate payments to the various charges. It also produces a report suitable for use as a statement or invoice.

When registering a student, Sumac checks to make sure the student has not already been registered in the same course.

The Course View lets you sort the upper left list of courses by clicking column titles.

There is a new button which helps calculate the percent weighting of each exam to give its contribution to the final mark. This calculation can use the number of hours taught by each teacher to suggest weightings.

When choosing a session, those that are already full are displayed in grey.

The attendance report lets you choose what type of courses to show. It also has an extra column which totals each row.

Courses can be marked to not appear on your website.

The course registration module automatically tracks and logs these types of transactions: (a) move a student from one session to another; (b) add a student to the wait list; (c) register a wait list student in the course he/she was waiting for

Donations

There is a new batch report which shows account totals.

The donations list supports sending email.

Grow-Your-Own (GYO)

Search Builder searches for GYO records are more specific about which relational operators are allowed in the searches.

Date fields can have initial values.

Import, Import Workspace

The Import Workspace has two new buttons: one to find and select columns that are empty, and another to find and select columns that are copies of another column.

The Import Workspace can find contact IDs by about 20 different fields, not just first and last name. It also identifies ambiguously identified contacts.

When importing information related to contacts, you can now identify a contact by his/her birth date, in addition to the 20 or so other fields available.

Labels Dialog

The Labels dialog is simplified somewhat by removing the checkbox that indicated a return address should be printed on envelopes.

Notifiers

Sumac now supports Notifiers – a way to automatically notify people when certain events occur.

A Notifier automatically sends an email to a specified email address when one of these things happen:

- a donor makes his or her first donation,
- a donor makes a donation over a specified amount,
- a contact of a certain type is changed, or
- a contact is marked deceased.

Pledges

When you do a mail merge on pledges, you can now use LI formulas. The subordinate items that are listed are the donations associated with the pledge.

Reminders

When using an action plan, as each step is marked completed, Sumac shows the user who performed the step.

Search Builder

Several small clean-up things were done to Search Builder. Among them, the descriptions of searches are clearer, and the buttons and messages relating to them are clarified.

Search Builder windows are now scrollable: as criteria are moved to near the edge of the window, scrolling is enabled.

Searching

When you search for a field is not equal to a specified value, Sumac also finds records that have null in the specified field.

Security

You can mark a communication type to indicate that communications of this type are normally sensitive. When a communication is given this type, Sumac automatically sets its sensitive checkbox.

You can define user types that allow only selected users (those with that type) to see sensitive information about specific contacts who have that user type.

Tasks

The Tasks list has a report that shows volunteers assigned to work with specific clients.

The Tasks list supports sending email.

Ticketing

The “order on website” field in event groups is provided to let you tell Sumac how to sequence groups of ticketable events on your website.

You can mark venues as inactive so they don’t appear when you are specifying a venue from a drop-down menu.

Seat Blocks can be marked to not appear on your website.

The Preferences window allows you to change the text that asks a patron, ordering tickets on your website, how he/she found out about your events.

Time Dockets

The Time Dockets list now has a Set Values button.

Website Integration

There is a new release of all Sumac website components which provides a single package that does what four or five packages did before. It provides for more flexibility and power as well as convenience to a website designer.