



Version 4.2.11 Release Notes

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Introduction

This document describes features which were added to release 4.2.10 of Sumac to create release 4.2.11.

Auctions

Auction attendee records contain financial information: what was purchased and how it was paid for. Sumac can now automatically use this financial information to create ledger entries.

Awarding Grants

This is an entirely new add-on. It allows you to accept applications for some sort of benefit: perhaps a grant or a job. Sumac can then gather multiple reviews for each application, help you rank and decide on which applications are successful, then inform the applicants.

Campaigns

You can change parentage of a campaign, either assigning a campaign to a different parent, or making it a top-level campaign so it has no parent.

Case Management

In a case management record, each field for choosing a contact has a link button that shows the contact's details.

Contacts

When a user editing a contact record is required to fill in a mandatory field, Sumac shows the user the tab that holds the field.

There is now a mail merge variable (*c_Email_To_Use*) that shows the email address(es) that will be used if you use Bulk Email to send to a particular contact. You can also show the email addresses to be used as a column in the contacts list window.

Course Registration

Sessions can have an account code, which is automatically put into the registrations in the session.

There is now a preference to tell Sumac to *not* show course durations on your website.

When a promo code is entered in a registration, taxes are recalculated based on the reduced session fee.

Donations

Sometimes a particular type of donation is never receiptable. In this situation, you can specify, in the definition of the donation type, that whenever a donation is given that type it should automatically be set to *not receiptable*.

The donations list can show fund descriptions.

There is a new report that breaks donations down by country and contact type.

Donation batches can be made inactive so you cannot add donations to them.

Forms

The forms list window can show several additional fields about the contact the form is attached to.

Grow-Your-Own (Custom Add-Ons, GYO)

In a GYO record each field for choosing a contact, has a link button that shows the contact's details.

GYO records can support 30 flag fields (formerly 20). Flag fields are presented as checkboxes in Sumac and in forms on your website.

A GYO record can have a named colour, which is chosen when editing the record. The colour field causes the record to be drawn in colour in the GYO list and calendar views.

Import Workspace

Some commands have been enhanced to run about 1000 times faster. The command buttons affected: Group Duplicates, Remove Duplicates, Script (when doing a *map* command).

Invoices

Tour Booking Programs can be added to invoices.

Memberships

You can search for memberships that were current in a date range, in addition to being able to find those that were current on a particular date.

Payments

Payments record the time (in addition to the date) when they were created.

If a user fills in the details of a payment that can be processed, but does not process them, then a warning is issued to confirm that this is really what the user wants to do.

The payment batches list window has a deposit slip report. It lists and summarizes all payments in the batch. In addition, if there are sales in the batch, it shows an inventory list.

The payment list window has commands to integrate payments with invoices, so you can create an invoice from a payment, and show the invoice that includes a particular payment.

Pledges

Pledge records can now identify a soft credit contact and also a solicitor.

You can define a notifier to inform you when a new pledge is created.

Reminders

The Day View of reminders shows separate columns for the contact, user, and description of the reminder, significantly enhancing usability.

Reminders automatically record the date when they are created, and this date is searchable.

Sales

Discounted products are ledgerized a bit differently. If the discount has an account code, then the amount of the discount is ledgerized along with the full price of the product. However, if the discount does *not* have an account code, then the discount amount is *not* ledgerized and the net (discounted) price of the product is put in the ledger.

Ticketing

To help you build a template to be used to mail merge ticket orders, the Utilities/Template/Make Template window now has a testing context for ticket orders.

The ticket orders list has a new report that shows who purchased a package in one time period but not in another.

The Sold Tickets report shows the patron's phone number.

The important Sales Summary (Event Group) report now shows tickets that were discounted by coupons.

Importing of ticketing data has been enhanced to allow importing of seat blocks, and also price schemes with specific currency price points (in addition to discount levels).

Volunteers and Tasks

You can specify that an activity type is inactive, so it can no longer be chosen in a task.

You can set up programs to be associated with specific departments. So when a user is editing a task and chooses a department, the list of available programs is shorter.

A security preference lets you tell Sumac to automatically log whenever a task is viewed or edited.

Website Integration

The Awarding Grants module is fully integrated with websites, so grant applicants can apply for grants and reviewers can review and rank the applications on your website.