



Version 4.2.16 Release Notes

2015-08-17

Contents

Introduction – 3
General – 3
Accounting – 3
Campaigns – 3
Case Management – 3
Collection Management – 3
Communications – 4
Contacts – 4
Course Registration – 4
Donations – 4
Email – 5
Events – 5
Grow-Your-Own (Custom Add-Ons, GYO, Forms) – 5
Importing and Exporting – 5
Ledger Entries – 5
Mail Merge – 5
Memberships – 5
Payments – 5
Pledges – 6
Reminders – 6
Reports – 6
Sales – 6

Security – 6
Ticketing – 6
Time Dockets – 7
Tour Booking – 7
Users – 7
Volunteers (Tasks) – 7
Website Integration – 7

Introduction

This document describes features which were added to release 4.2s.15 of Sumac to create release 4.2.16.

General

Sumac supports spell checking. To enable this feature, you need a list of acceptable words. We can provide you with three English dictionaries (Canada, United Kingdom, United States). This feature can work in any language; if you know of a good word list in any other language, we would love to make it available to the Sumac community.

We are enhancing Sumac to give you more control over the fields that are in different types of records. This release is the first to implement this feature. It supports user-settable hiding, renaming and mandatory for fields in communication, donation, and task records

The window for choosing columns to be displayed now supports typing to scroll in the left hand list of available fields (if it has been sorted). So for record types that have a lot of fields, you can find them faster.

When a new release of Sumac causes the database structure to be updated, and some users are logged in, the warning message shows the names of the users. Note that this feature depends on an analysis of security logs, so it may not be 100% accurate.

We continue our work to make Sumac more accessible for people who cannot use a mouse. In this release, if you tab into a scrolling list, keyboard keys for navigating in the list (page up and down, arrow keys) become active.

All admin users, even those using Sumac Online, can now export a backup copy of their database to a text file. So if you want to make sure you have a backup file at a certain time or place, you can get one any time.

Sumac can now automatically export its log entries to a central logging location.

Accounting

The integration between Sumac and QuickBooks now supports QuickBooks classes (a way of classifying transactions, in addition to accounts).

Campaigns

If the number of contacts in a campaign is less than the total in the universe of the parent campaign, Sumac warns the user.

A column showing the number of unique donors has been added to the campaign summary-by-date-range report.

The donations and outstanding pledges for a campaign report has these changes:

- a. it is now an HTML report, available from the Campaigns, Donations, and Pledges list windows
- b. a new column shows the in-honour contacts.

Case Management

Case management now adds two configurable types of records (instead of just one). These records can be linked to one another to create parent-child or bi-directional relationships.

Collection Management

You can search for collection objects by event, event type, and location type.

When showing a collection object in the contact list or a contact history tab, it can now be double-clicked and edited.

When connecting media files to a collection object, Sumac gives you the option of to move media to Sumac-managed folders or leave media file in a user-managed location.

Communications

You can configure fields in communication records, renaming them, making them mandatory, or hiding ones you don't need.

In the communications list, under Analyze & Report, in the Explore command, when you enter a search criterion instead of having two date fields, you have a standard date range selector. This lets you use a drop-down menu to quickly enter common date ranges (e.g. Last Fiscal Year).

Contacts

Search Builder Enhancements

Search Builder can search in the *when checked* and *next validation* fields in skill facts.

In Search Builder, you can search pledges by total amount.

When using Search Builder to search by donations, memberships, invoices, or course registrations, you can specify which contact field should be searched.

Other Change

The Add To Contact button in the contacts list window now warns a user if she is adding to an inactive contact.

The Add To Contact button works for Facts, so you can add the same fact to many contacts at once.

Update operations have always been able to identify contacts in the incoming records using several different fields (e.g. name, ID, postal code). Now they can also identify contacts using values in user-defined extra fields.

Course Registration

Web-based course registration now supports optional donations.

Sumac shows session codes in course registrations in the contact history tab.

Donations

Reports

The *Donation in-honour totals* report provides an option to show only deceased contacts.

In the donation batch list, the account report shows which batches are in the report.

The *Donations - reconciliation - By fund (detail)* report is now an HTML report in the donations list window. It has an additional column to show cheque numbers, and gives the option of sorting by date or donor name.

These two reports are converted to HTML and available in the donations list window: Donation – by payment type (detail), Donation – by donation type.

Other Changes

The loading of donation batches is dramatically faster.

You can change the visibility of some fields in donation records.

If an online donation does not have a recognition field, then Sumac looks in the donor contact's record to get the recognition from there.

You can search donations by reconciled status.

When merging donations grouped by send-recognition contact yields no contacts, it now gives an error message.

There is a preference to bcc the email that is sent to a donor for online donations and pledges.

PDF donation receipts sent in response to online donations are encrypted so they cannot be changed.

Email

Bulk Email window now supports segment-specific email templates. If contacts being sent an email are in different segments, then you can choose a different email template for each segment.

Events

The Event List window has a Details report that lists different types of information connected to that event. It is similar to the Info-Details report in the Contacts List window.

Sumac analyzes and reports more conditions that might make a ticketable event not show up for ordering on a website.

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

A GYO text field can hold a link to a file.

When you open a list of forms, you now have the ability to search on all fields in the form records.

There is now a Info-Details report for forms. It can show all fields in the selected form(s) as well as information about contacts in the form.

In the panel of buttons in a task, for connecting to a GYO record, there is now a New button so you can either create a new GYO or connect to an existing one.

Importing and Exporting

Update operations have always been able to identify contacts in the incoming records using several different fields (e.g. name, ID, postal code). Now they can also identify contacts using values in extra fields.

Sumac is now more effective at handling paragraph breaks that occur within large text fields. When you export these fields, you can tell Sumac to replace paragraph breaks with these two characters: \n. When Sumac imports large text fields, if it encounters the two characters, \n, it converts them to a paragraph break.

Export operations run significantly faster.

Ledger Entries

The Ledger Entry Account Summary report now shows the date range of ledger entries that are in the report.

Mail Merge

The Utilities/Template/Mail Merge Codes window has been simplified. Instead of a large number of drop-down menus for field identifiers, there are two: one to identify the type of records of interest, and the other to choose the field. Also, the field identifier drop-down menu has descriptive text (the field name) in addition to the field identifier itself.

Memberships

A new report shows the number of memberships by contact type.

Payments

If a cash payment is being entered, Sumac shows fields that let you enter the amount of cash that was tendered and the amount of change that is due to the payer.

Sumac's integration with payment processors has been enhanced:

iATS: Sumac now supports the iATS international server in addition to their North America server. Sumac can perform credit card refunds through iATS.

Beanstream: Sumac can process credit card refunds through Beanstream.

When editing a Payment record, the field that used to say what type of record the payment was attached to now is a link to show the related record.

The payments list window lets you search by payment batch.

Before this release, almost every field of a payment was locked after the payment was processed. Now some fields (e.g. account code) can be edited in payments that have been processed.

This report was converted to HTML and shows Notes as an additional column: Payments – type (detail).

Pledges

The Pledges list has a report that compares pledges and donations over two years.

You can Save and Load search criteria in the Pledge list window.

In the Pledges list, you can search to find pledges that have been fulfilled but not yet renewed.

In Search Builder, you can search pledges by total amount pledged.

The Pledges list lets you search pledges by total amount pledged.

The Pledges list lets you Bulk Edit pledge statuses.

When entering payment details into a pledge, payment fields that are not relevant are hidden.

There is a preference to bcc the email that is sent to a donor for online donations and pledges.

Reminders

Reminders can tell you (by beeping, a pop-up window, or an email) when a meeting is about to take place.

In the Reminders list, Bulk Edit can now change the start and end times of reminders.

Reports

HTML reports now print with a consistent font size.

Sales

In the Sales List dialog, there is a new report that summarizes product sales.

The sales report by contact has been:

- a. moved from the Reports button to the Sales list window,
- b. converted to HTML, and
- c. enhanced to do some calculations more accurately

Some discounts caused rounding errors that made sales records and ledger entries to be imbalanced. This problem has been fixed.

Searches in the Sales list have been optimized and now run much faster.

Security

If a user is not allowed to see contact details then:

- a. the Choose Contact window shows only the ID and name, no other contact information, and
- b. GYO records allow choosing a contact but the link buttons for showing the contact details are not available.

Ticketing

Seat blocks can now have a low seat number of zero.

The ticketing module supports bar codes: you can have people print their tickets at home with bar codes, then the tickets can be scanned as they come in the door. If you print the tickets on an in-house printer, you can also print bar codes on the tickets.

Time Dockets

Time Dockets can be searched by user and by department.

Departments can be limited by segment.

Time docket now have links for showing contact records for the worker and the client.

Time docket now allow up to 8000 characters in their Note fields.

Time docket now allow you to edit the Worker when the time docket is being created by an Add To Contact button.

Tour Booking

The tour booking feedback report is now an HTML report, available in the Programs list window. It was enhanced to show the contact providing the feedback.

Users

User records now can point to a contact. This was added to support the move to making Sumac available through web browsers, but it will probably be useful in other areas too; if you can think of a way this user-contact connection could help you, please let us know.

Volunteers (Tasks)

Departments can be made available to only users in specific segments.

When Tasks are displayed in the History tab or in a contact expanded in the contacts list, the Task Type shows in the description of the task.

You can customize task records by:

- a. renaming some fields
- b. specifying that certain fields should be hidden (because you don't use them), and
- c. specifying that certain fields are mandatory.

In the panel of buttons in a task, for connecting to a GYO record, there is now a New button so you can either create a new GYO or connect to an existing one.

The New Multiple button for tasks lets you specify a list of workers and a list of clients, then creates many tasks, one for each client-worker pair.

Website Integration

The newest release of the Sumac website integration components has these enhancements:

- a. directories have index.html files to prevent web users from browsing their contents
- b. phpinfo.php has been removed for security reasons
- c. the Enter key and an email or password field activates Login or Create Account buttons

Web-based course registration now supports optional donations.

If an online donation does not have a recognition field, then Sumac looks in the donor contact's record to get the recognition from there.

Sumac analyzes and reports more conditions that might make a ticketable event not show up for ordering on a website.

There is a preference to bcc the email that is sent to a donor for online donations and pledges.

PDF donation receipts sent in response to online donations are encrypted so they cannot be changed.