



Version 4.2.17 Release Notes

2015-09-15

Contents

Introduction	– 2
Accounting	– 2
Communications	– 2
Contacts	– 2
Course Registration	– 2
Donations	– 2
Email	– 2
Events	– 2
Grow-Your-Own (Custom Add-Ons, GYO, Forms)	– 2
Pledges	– 3
Security	– 3
Ticketing	– 3
Time Dockets	– 3
Users	– 3
Volunteers (Tasks)	– 3
Website Integration	– 3

Introduction

This document describes features which were added to release 4.2.16 of Sumac to create release 4.2.17.

Accounting

Account codes can now be up to 210 characters (formerly limited to 40).

Sumac's QuickBooks integration can now link transactions to vendors not just customers. Ledger entries being exported to an Accounts Payable account require a vendor to be specified.

Communications

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

When you alter Extra fields in contacts, you do not need to restart Sumac; it can automatically reconfigure the contact records.

Course Registration

The Course View dialog shows teachers and maximum students allowed in the top right corner list of sessions.

The Class List with Financials report in the Registration list dialog has been enhanced.

You can search registrations by class location.

The Registrations list window, can show membership details and the contacts' phone and email.

Sumac can now generate fairly powerful transcripts for course registrations.

When a registration is entered from course view, registration view, or contacts list (add to contact), so the payment status window immediately after the registration window.

Donations

There is now a General Control for searching in the donations list, enabling more powerful multi-step searches.

A new report shows donations by fund type (rows) and contact type (columns).

The *Donations - reconciliation, by account (detail, batch)* has been converted to HTML, and the Batch ID was added to the header.

Email

The Receive Email window creates a communication when an email is replied to.

Events

An event can point to a campaign; if you enter that event in a donation, then the campaign is automatically filled in too.

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

You can search GYO lists by event date.

GYO records can now have up to 80 date fields (formerly 70).

A field in a GYO record can restrict the choice of a contact by gender and also by household.

Case records being used as extra GYO records can now be published as directories on a website.

Pledges

You can search in the pledges list or search builder, by the total amount of a pledge.

Security

Sumac can automatically log when a backup of your database has been performed, and warn you if it has not been done for awhile.. Note that if you use our hosting service, you do not need to do this because your database is being backed up three times each day.

Ticketing

The attachment of bar codes to ticket documents is now optional.

Time Dockets

A new preference lets you set the default reimbursement rate for travel time in time docketts and tasks.

Users

A new user capability can give a user the ability edit lookup lists without giving the user access to all admin functions.

Volunteers (Tasks)

A new preference lets you set the default reimbursement rate for travel time in time docketts and tasks.

Website Integration

When your website sends a response email for a donation received online, the templates used for the email can be segment-specific.

Case records being used as extra GYO records can now be published as directories on a website.