



Version 4.2.3 Release Notes

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Introduction

This document describes features which were added to release 4.2.2 of Sumac to create release 4.2.3.

General

When you click to choose a tab at the top of a window, it stays where it is, and just changes its appearance. Specifically, if there are multiple rows of tabs, the row holding the clicked tab does not move to the bottom row of tabs.

User profiles have a checkbox that allows you to prevent a user from using Duplicate buttons in any window.

Backup

Sumac now has a powerful feature for backing up and restoring databases:

- It compresses the backup, so backup files are very small.
- The backup file contains checksums to detect tampering.
- The backup format is independent of the database being used, so the backup file can be used to restore the data to a completely different server and database management system.

The backup file is created using Utilities/System Administration/Backup Entire Database. A backup file can be restored using Utilities/System Administration/Use New Database.

Campaigns

A few reports about donations or communications, by campaign, formerly showed only the information connected to the selected campaign. Now these reports show information connected to the selected campaign and any of its children.

The Campaign List window has a new report, which shows campaigns by fund and account.

Communications

You can Save and Load searches in the communications list.

You can search communications by Event Type and Campaign.

You can search communications to find the user who entered the communication.

Contacts

When you expand a contact in the contact list, you can show Facts.

The Summary tab in contact records has a picture based on gender (individual, household, organization).

The Summary tab lists related contacts. The name of the related contact is a link which opens the related contact's contact record.

The Summary tab contains email buttons which send an email to the contact.

The Basic tab in contact records has the same fields but they are in a more organized layout.

The Basic tab lets you choose languages for a contact. If you would like to specify labels for these language fields (e.g. Spoken Language, Home Language), there is a preference to let you do this.

List Builder windows stay on top of other windows, so you can work with several windows at once and not lose track of the list that you are building.

Course Registration

The window for choosing a session lets you show only sessions that have not yet ended, often greatly reducing the list to consider.

Donations

When you are asked to specify a donation batch, you have the option of Reloading all the donation batches.

New preferences let you tell Sumac that whenever you create a new donation, its payment type and receipt date should be entered from the last donation that you viewed or created.

When doing a mail merge, two new mail merge codes enable you to include the donor's phone number and paper mail address in the output document. This is particularly useful if your mail merge template is producing a list of donors to send to a particular Send Recognition To contact.

You can now generate an invoice from a donation.

Donation records have an Acknowledged checkbox. You can edit it manually. In addition, whenever you generate receipts or perform a mail merge on donations, you are asked if you want to set it for all the selected donations.

You can search donations to find the user who entered them.

The Donation Dashboard can now report the number of first-time donors by quarters or by year.

The Donation Dashboard can now calculate the ask ratio of your communications over various time periods.

Email

When you send bulk email, you can tell Sumac to *bcc* every email to a specific email address.

When you send bulk email, you can delay the start of sending to a specific date and time.

Events

Each event has a *Reconciled* checkbox. When you have reconciled the revenue and expense figures in the event record, you can click *Reconciled* to lock the figures.

Fund Requests

When you Add To Contact and choose Fund Request, you can specify that you are adding to the contact as the funder or as the solicitor.

Grow Your Own (GYO)

You can specify that a long text field in a GYO record is to be treated as an alert. Previously only text fields could be used for this purpose.

When you define a text or count field in a GYO record, you can tell Sumac that all records must have unique values in that field. If you use a field to record a case number or file number, then Sumac ensures that you don't accidentally create two records with the same value.

There is a Print button in the window used to edit and enter forms and GYO records.

Import Workspace

Import Workspace: when only a subset of records is showing, if you click Save As, you have the option of saving all or just some records.

Invoices

If you use the Preferences dialog to clear the names of invoice fields, you can tell Sumac how many (out of six) fee fields to show, and one or no surcharges (out of two) to show.

You can save and load searches for Invoices.

The invoices list allows Bulk Edit operations.

Invoices have an *Exported* checkbox which helps track when an invoice has been sent to your accounting system.

Mail Merge

When you use Mail Merge to create a single output document, there is an option to automatically open the output document, saving you having to navigate through directories to find the resulting file.

Memberships

There is a preference telling Sumac to automatically log the creation and editing of membership records.

Payments

ACH payments are supported with payment processor Vanco.

ACH payments are supported with payment processor Century Business Solutions.

Sales

A new report, available in the sales list window, shows sales by product and date.

The Sales list window has commands to integrate Sales with Invoices.

Search Builder

The boxes it creates and lines it draws have a more pleasing appearance.

The buttons formerly on the bottom are on the left side and look like other command menus in Sumac.

In addition to a title, you can specify notes in search builder boxes.

Surcharges (Taxes)

You can specify a maximum amount for a surcharge. For example, if you apply a service charge of \$3.50 per ticket, but only up to \$10.00, Sumac can now automatically limit the surcharge to \$10.00.

Tasks (Volunteers)

The Calendar view of Tasks lets you show by multiple departments (instead of just one specific department).

There is a preference to let you can specify that only users of a certain type are allowed to see volunteer-related facts.

On the right hand side of the Tasks list window, there is a list of workers. There is now a button just above this list that lets you show and hide it.

Ticketing

The Sales By Event Group report fixes some calculation errors and provides considerable additional information about payments and price points. This report also runs much faster than it used to.

The Sold Tickets report allows you to sort it by any column.

The Ticket Orders list window has Save and Load buttons so you can save and restore frequently performed searches.

Ticket order discounts are now properly ledgerized.

The brief description of a ticket order, which displays in the contacts list when you expand a contact, now shows ticket and subscription counts separately.

The ticket orders list window allows you to create an invoice directly from a selected ticket order.

Web Groupings are automatically sorted (alphabetically).

Time Dockets

You can Save and Load searches in the Time Dockets list.

You can search time docket by various additional search criteria.

The time docket list can produce a report that shows times docketed by volunteer type.

The time docket list can produce a report that shows times docketed by worker.

The time docket list has a new report to summarize years and count number of years a worker has worked.

Website Integration

If you accept donations from your website, you can have Sumac automatically generate and email a receipt to the online donors.

If you accept donations and pledges (recurring donations) from your website, you can now put them together on one page instead of needing two separate pages.

If you allow people to make donations by identifying themselves with just an email address (i.e. not also requiring a password) then you can suppress the display of the donor's contact details.

A fourth parameter in *userdata* lets you specify a contact segment to hold newly created contacts. This is helpful for segmented databases which present segmented websites.