



Version 4.2.9 Release Notes

2014-09-17

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Introduction

This document describes features which were added to release 4.2.8e of Sumac to create release 4.2.9.

General

When you are editing a record which you are not allowed to edit, the appearance of the window changes to make it obviously non-editable.

Campaigns

In the campaign list window, the Compare Selected Campaigns report now shows pledges as well as donations.

Case Management and Grow-Your-Own (GYO)

The windows for editing lists of GYO fields and lists of Case Management fields now have their editing buttons on the left hand side instead of the bottom of the window.

If a formula assigns a numerical value of zero to a date, Sumac sets that date to null. This enables a formula to clear out a date based on values entered into other fields in the record.

Contacts

Changes to the dialog for choosing a contact:

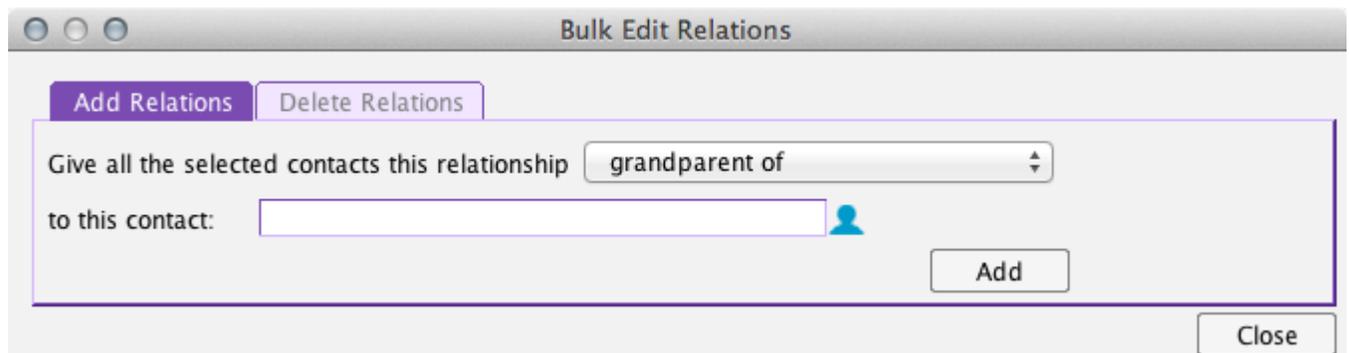
- The colour legend now shows the colour used to designate deceased contacts.
- Organization name now shows as a column.

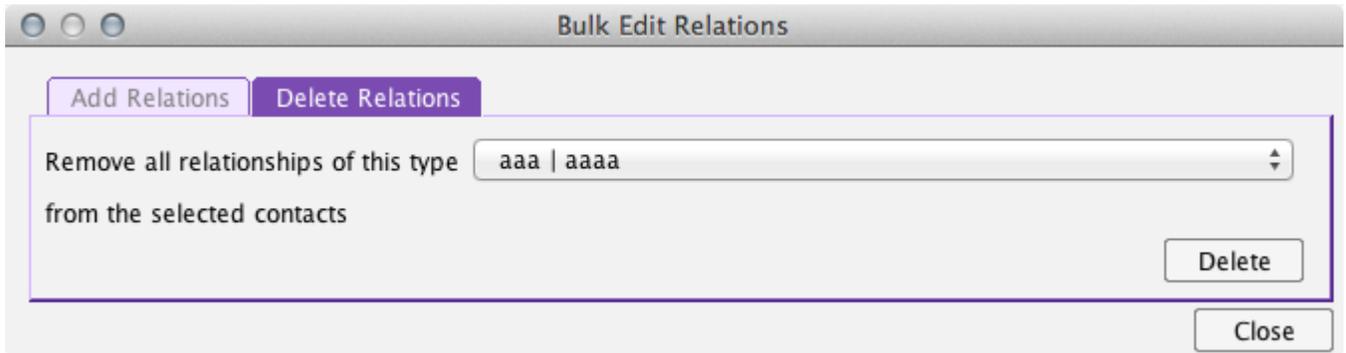
In the window for entering and editing a single contact:

- The button for adding a Skill fact to a contact allows you to enter several at once.
- A Preference lets you tell Sumac that a contact record must always have at least one communication preference.

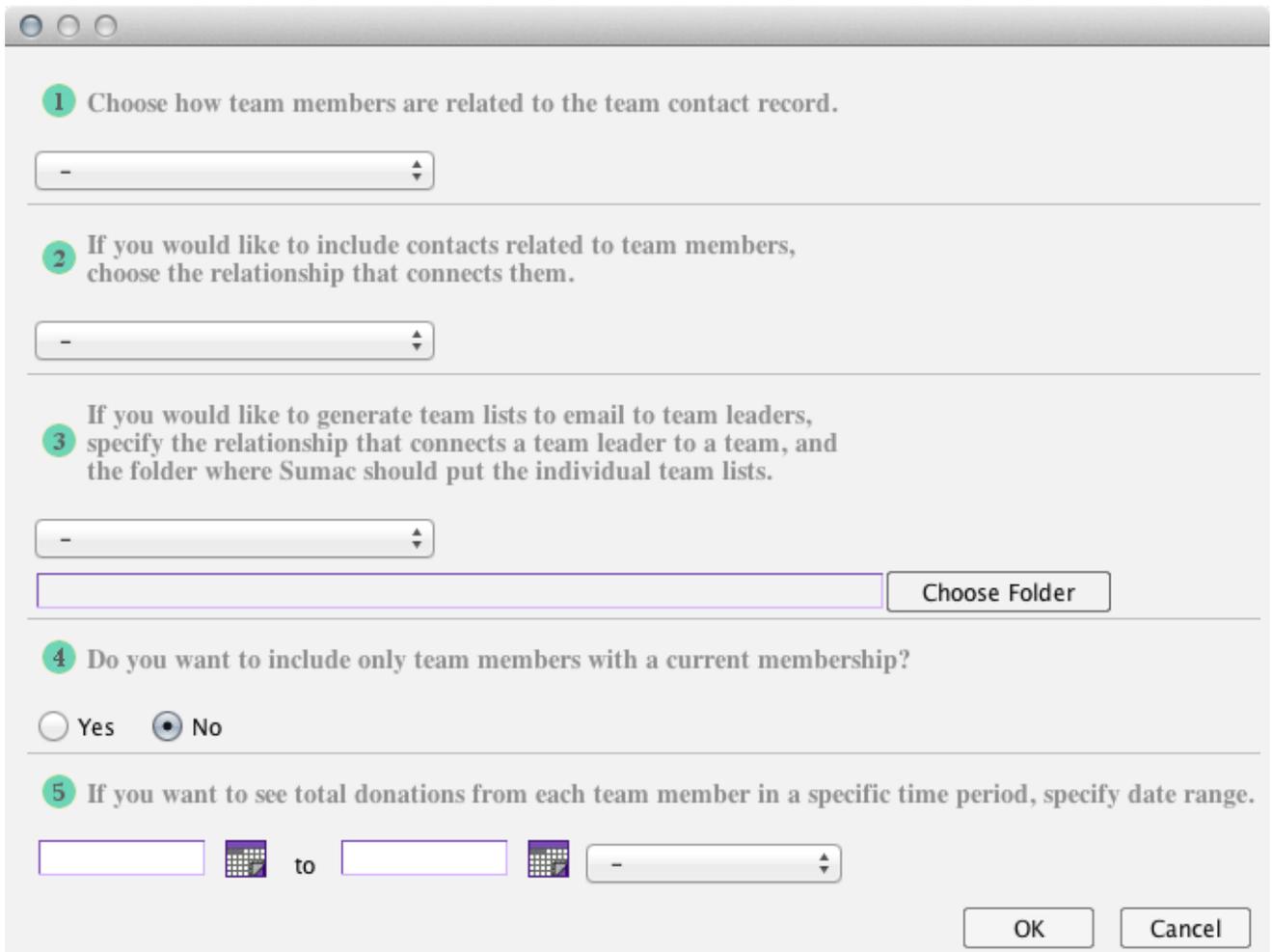
In the contacts list window:

- The expansion panel has a *Comm. Types* button that lets you specify which communication types should be omitted when a contact is expanded. This enables you to hide particularly numerous types of communications (e.g. a bi-weekly newsletter).
- The Bulk Edit command lets you edit relations. You can add relations to a specific contact, and you can delete relations of a particular type:





- There is a new Team report for contacts. It gives you several options for reporting on teams or clubs whose members are connected to a particular contact:



Course Registration

If you allow students to register for courses using your website, you can now show extended session descriptions. A preference lets you tell Sumac to append the course description to session names when they are presented in the course catalog on the website.

When preparing an Attendance Sheet report, you can specify a date range. Instead of producing an attendance sheet for the entire session, this lets you prepare one for each week or month.

Payments associated with billable items (e.g. ticket orders) which handle their own payments are now identified in the Registration List payment status dialog.

The Lookup List dialog lets you do mail merge on courses and sessions, so you can prepare a catalog of selected courses or sessions, formatted any way you want.

Also, see *Products* below.

Donations

In the window for entering and editing donations:

- There are link icons to show details of the donor, in-honour, send recognition, and soft credit contacts.
- Fund can be made a mandatory field in donation records.

You can create Notifiers to send an email when a donation of a particular *type* has been added to the database.

In the donations list window, the last section of the Fundraising Status report which groups pledges and donations, now shows additional numerical properties (e.g. minimum, median) of pledges and donations *combined*.

The window for choosing a Donation Batch lets you sort a column then type-to-scroll within that column, making it faster to find the particular batch you are looking for.

Forms

List windows for showing forms now allow you to search forms to find those for contacts in a particular group.

Invoices

You can create and show invoices from the Tour Booking Programs list window.

The window for editing an invoice has these enhancements:

- It is scrollable to accommodate shorter displays.
- You can add grow-your-own records as charges in an invoice. Note that this requires you to specify in the Preferences dialog (Invoices tab) which fields in the grow-your-own records identify a contact and a billable amount.
- There is now a drop-down menu of standard fee descriptions so that you can standardize the text and save typing time.

Membership

There are now Preferences (Membership tab) to let you rename the three account fields in membership records.

The membership list window can produce a report that shows lapsed members. It compares memberships between two periods that you specify:

i Compare memberships in the first and second date ranges.

to

to

OK Cancel

Payments

When you import payment information from an external source, you can import the linking information that connects the payments to other records (e.g. to a ticket order).

A Sumac administrator entering details of a payment processor, can now choose the payment processor from a drop-down menu, and the URL is filled in automatically. This saves lots of error prone typing.

A payment machine – the Moneris iCT250 – is now supported. If you have a card-present payment situation, perhaps for a special event or in a gift shop, you can use this machine to handle debit, credit, and various types of cards (chip-and-PIN, swipe). Because the machine connects directly to the Moneris network, fees are greatly reduced.

In the payment list window, the Bulk Edit command allows you to set Payment Purpose and Account.

Pledges

In the pledges list window, fund code and fund type can be displayed as columns and they are searchable.

When a pledge is entered on your website, the dedication or in-honour note that the donor enters is put into the note field of the pledge record.

Products

A new field – cost – has been added to product records.

If you use products for both course registration sessions and for sales, you can specify that any particular product should be just used for one or the other. This shortens the list of products available in both contexts, making it faster to choose the one you want.

Reminders

Obsolete Action Plans can be marked as inactive, so that when you are asked to choose an action plan, the list of choices is shorter.

The dialog for editing reminders has an Add To Contact button so while you are editing a reminder, you can add other types of information to the contact.

Sales

Product sales records can now record a shipping address.

Also, see *Products* above.

Tickets

Ticket orders can now record a shipping address.

When you edit an event and specify coupon code discounts, Sumac restricts the selection of discounts so you can only choose those which actually have a coupon code.

Several enhancements enable more powerful importing of ticket information into a Sumac database:

- Accounts can be imported into ticket orders
- When importing ticket orders, you can specify in detail the tickets that were part of the order. See *Tickets in Ticket Orders* below.
- You can import seat blocks and price schemes.
- You can import up to three payments using fields in a ticket order. Note: you can import as many as you need by importing the payments themselves and linking them to the payment order: see *Payments* above.

Tickets in Ticket Orders

When you import ticket details into a ticket order, you put all the ticket details into one column (labelled *Ticket Details* in the import dialog) which contains information about the event, the number of tickets, and the applicable discount.

Here is the syntax of what goes in the *Ticket Details* column:

```
event: quantity discount, quantity discount; event: quantity discount, quantity discount
```

For example, this:

```
MacBeth: 3 adult, 2 senior; Hamlet: 120 children, 10 adult
```

means that the order holds tickets for MacBeth (3 adult and 2 senior tickets) and also tickets for Hamlet (120 children and 10 adult).

Note 1: The quantities are all simple integers. Zero and negative numbers cause the quantity and discount to be ignored.

Note 2 The discounts are all discount names (from the price scheme used by the event). If no discount is specified, then Sumac assumes the ticket was not discounted: i.e. a full price ticket. So this:

```
MacBeth: 3, 2 senior
```

means that there were 3 full priced tickets and 2 senior tickets for MacBeth.

Note 3: The events can be fully qualified event names. So if Hamlet was presented on two dates, the date can be added after the name. So this:

```
Hamlet, 2014-08-01: 120 children; Hamlet, 2014-08-02: 120 children
```

means that the order holds 120 children tickets for the Hamlet performance on August 1, and also 120 children tickets for Hamlet on August 2.

Tour Booking

Several new fields have been added to records in the Tour Booking add-on.

- In program records: the date the contract was sent, the date the contract was received, the start and end dates for the program, and the number of hours of service delivery committed for the program.
- In program, workshop, and personnel records: two new financial (expense) fields have been added to hold lodging expense and a per diem expense.
- In workshop records: five additional Actual Audience fields are available.

You can now send Bulk Email from the Tour Booking Programs list window.

Feedback records in programs let you specify the contact who provided the feedback.

Tour booking information shows in the History tab in contact records

Volunteers and Tasks

Tasks can show (as columns or for mail merge) the phone, email, and postal mailing address of the client and the worker.

The Assignment Notes and Completion Notes fields are larger and allow the entry of paragraph breaks.

The dialog for entering and editing tasks is scrollable to accommodate shorter displays.

Website Integration

Integration of a Sumac database to a website requires Sumac to be available to respond to requests from the website, and Sumac operating in this way is usually configured to automatically log on. If you use Sumac in this way, the auto-logon process is now delayed by 10 seconds so that a user has an opportunity to cancel the auto-logon and log on manually.

Release 5.6.3 of the website integration components provide these enhancements:

- Some of the brief response messages that Sumac sends to a website on completion of a transaction (e.g. *Thanks for your donation*) can now be customized. The messages that can be changed, and how to change them, are described in the Sumac Users Guide (see the title *Response Messages* in *Appendix B*).
- The log-in windows have been simplified, and made easier to use.
- Note: before you use release 5.6.3, you must read the section below: *Changes in Web Components Release 5.6.3*.

Changes in Web Components Release 5.6.3

Introduction

This new release of the website components includes a simplified log-on process (which includes creating a new user record). It also gives you the ability to customize the log-on process for different components: e.g. perhaps you want one log-on for course registrations and another for memberships.

This means that the old parameters that applied to all types of log-ons no longer work, and they have been replaced by new parameters that are specific to each type of log-on.

Strings and Parameters No Longer Used

These strings in the 'user/sumac_string.settings' file are no longer used in version 5.6.3. The user parameters associated with some of them – identified by the 'obup=' phrase in the description – are not now used either.

AT10|TextOldDonor|I am in your database|

AT11|TextNewDonor|I am a new donor|

A11|InstructionsEmailPassword (obup=password)|If you have forgotten your password, enter your email address and click Email Password. Your password will be emailed to you. Then you can log-in.|

A12|InstructionsLogin (obup=login)|Enter your email address and password. Then click Login.|

A13|InstructionsAddUser|If you are not in our database, please enter your information. Then click Submit.|

A14|InstructionsLoginNP|If you have already provided us with your contact information, just enter your email address and click Login.
Otherwise please fill in the whole form including your email address and click Submit.|

AL1|ButtonLogin|Login|

AL2|ButtonRetrievePassword|Email Password|

AL12|Button_SubmitDetails|Submit|

AF1|FieldAddUserEmail|Email:|

AF2|FieldAddUserCountry|Country:|

AF3|FieldAddUserLastname|Last Name:|

AF4|FieldAddUserCellphone|Cell Phone:|

AF5|FieldAddUserPostcode|Post/Zip code:|

AF6|FieldAddUserAddress|Address:|

AF7|FieldAddUserCity|City/Town:|

AF8|FieldAddUserFirstname|First Name:|

AF9|FieldAddUserPhone|Phone:|

AF10|FieldAddUserPassword|New password:|

AF11|FieldAddUserProvince|Province/State:|

AF17|TextLoginEmail|Email:|

AF18|TextLoginPassword|Password:|

CI6|InstructionsCoursesLoginNP (obup=craddorlogin)|If this is not the first time you have registered for one of our courses, just enter your email address and click Login.
Otherwise please fill in the whole form including your email address and click Submit.|

CI7|InstructionsAddCoursesUser (obup=craddcontact)|If this is the first time you are registering for one of our courses, please enter your information. Then click Submit.|

DI6|InstructionsAddUser (obup=dpaddcontact)|If you are not in our database, please enter your information. Then click Submit.|

DI8|InstructionsDonationLoginNP (obup=dpaddorlogin)|If you have already provided us with your contact information, just enter your email address and click Login.
Otherwise please fill in the whole form including your email address and click Submit.|

MI5|InstructionsMembershipLoginNP (obup=mrloginwopw)|If you are already a member, just enter your email address and click Login.
Otherwise please fill in the whole form including your email address and click Submit.|

MI7|InstructionsAddUser|If you are not already a member, please enter your information. Then click Submit.|

TI16|InstructionsTicketingLoginNP (obup=toaddorlogin)|If this is not the first time you have purchased tickets from us online, just enter your email address and click Login.
Otherwise please fill in the whole form including your email address and click Submit.|

TI17|InstructionsAddTicketingUser (obup=toaddcontact)|If this is the first time you have purchased tickets from us online, please enter your information. Then click Submit.|

UI3|InstructionsContactUpdateLoginNP (obup=culoginwopw)|Enter your email address (the old one if it has changed). Then click Login.|

New Log-on Parameters

These old parameters are now only used in the Contact Update screen:

omitfields

mustfields

There new parameters (described in the Sumac Users Guide) are now used for Donation, Membership, Contact Update, Courses, and Ticketing:

d1nouserpw

d1omitfields

d1mustfields

d1statesdd

m2nouserpw

m2omitfields

m2mustfields

m2statesdd

u2nouserpw

c2nouserpw

c2omitfields

c2mustfields

c2statesdd

t2nouserpw

t2omitfields

t2mustfields

t2statesdd