



## **Version 4.2s.14 Release Notes**

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## Introduction

This document describes features which were added to release 4.2.13 of Sumac to create release 4.2s.14.

## General

The generation and printing of HTML reports is enhanced in several ways. In particular, it now supports landscape-portrait page layouts.

There is a convenience command for editing the databases.txt file: Utilities/System Administration/Edit Databases File.

In Search Builder, searching panels, and reports where you choose a time period from a drop-down menu, the menu now has choices for fiscal years. There is a preference (in the Payments tab) for specifying the first month and day of the fiscal year.

The Export dialog has a checkbox that tells it to omit the line of totals that is otherwise added at the end of the file.

## Security

[The security of Sumac was already certified to be very high. This release enhances it further, as we try to anticipate and prevent possible security problems.]

User passwords were obfuscated using a hash algorithm before being stored into the database. They are now being modified, with both constant and variable components, before being hashed to make them even more secure.

Mouse-entered passwords are supported. These help keep passwords secure in the presence of keyboard listening viruses.

The security transaction log can be searched by type of log entry as well as by date.

The version numbering of Sumac releases has slightly changed. If a version contains security enhancements, the second number is followed by an *s*. Hence, this release is 4.2s.14, not just 4.2.14.

## Collection Management

The length of collection object description, set description, and notes fields have been lengthened to 2000 characters.

You can search for collection objects by curatorial notes.

The visibility of schema entries can be restricted by user types.

## Communications

In Sumac, you can specify a file that is connected to a communication. The file was being recorded as a path name in your file system. Now you have the option of also referring to a file that is stored in your database.

## Contacts

A new type of notifier can email you when a new contact is created.

In a contact record, when entry of a postal code causes city, state, or country to change, the user is warned that the change was made.

If an extra field is being displayed as several checkboxes, you can specify the number of checkboxes to show per row in the window for editing contacts.

If the contacts list shows membership expiry dates as a column, the loading of these expiry dates from the database is hundreds of times faster.

## Course Registrations

In Sumac, you can specify a file that is connected to a Session. The file was being recorded as a path name in your file system. Now you have the option of also referring to a file that is stored in your database.

The financial status report in the Registrations list has totals.

## Donations

The Email Receipts command generates an email for each recipient. The template used for that email can now access all the donations so that the email message can include information about them

You can specify that donations entered with a particular payment type are not receiptable.

A donation type specify a contact type. When entering a donation, when you choose the contact, Sumac looks at the contact's contact types, and if one of them corresponds to a donation type, the donation is set to that type

## Forms

Form Definitions can specify a template. This template is used to send an email to someone who fills out the form on a website.

## Grow-Your-Own (GYO)

The visibility of schema entries can be restricted by user types.

When you do a mail merge with GYO records, and use the sum syntax (e.g. `__y_Amount1`), the sum of the field identified is calculated for the GYO record's child records.

## Forms and Grow-Your-Own (GYO)

A checkbox allows you to specify that a field in a form or GYO record should not be displayed on a website.

When GYO and form record structure is changed, you do not need to restart Sumac to use them immediately.

You can now have up to 50 count fields (formerly 44) in forms and GYO records.

## Import

By default, the Exclude checkbox is turned on for the first line of a file.

## Import Workspace

The Maximum Length button can now both check for and truncate cells based on a user-specified maximum length.

The Validate menu can find cells that have characters that do not fit into non-Unicode databases.

The Validate menu can validate time zones and schema entries.

The button to append columns can append more than two adjacent columns at once.

The button to run a script can be applied to any number of columns simultaneously.

The Validate menu can validate multiple columns at once.

The Show All button preserves scrolling location.

A new button, Replicate/Collapse, collapses several columns into a single column, replicating rows based on the values in the columns being collapsed.

## Invoices

The Invoices list window has a new Receive Payment command that enables Sumac to process payments according to the payment schedule in an invoice (e.g. monthly or quarterly).

When invoices are loaded from the database (e.g. when a search is performed), the loading of the charge records (e.g. memberships, ticket orders, etc.) into invoices is much faster.

Invoices have a new mail-merge field that produces a summary of all charges. It can be used to list the charges in a mail merge operation.

## **Mail Merge**

If an HTML template uses an LI formula in, it produces an HTML table instead of just inserting tabs.

When you use an LI command when doing mail merge on contacts, the LI formula can specify communication types, and it generates a list of fields from the identified communications.

## **Membership**

When a membership is renewed, the membership fee is set based on the membership type rather than just copied from the old membership record. So if the membership type specifies a different fee from a year ago, the new membership record will reflect this updated fee.

## **Payments**

The Payments report in the Payment Batches window now includes a table that shows a breakdown by the accounts in the payments.

A new preference lets you specify that Sumac should not show credit card numbers to any user after they have been entered into the database.

A checkbox in the definition of a payment type allows you to specify that it should not be used on a website.

When a payment is about to be processed, Sumac loads the contact's segment from the database. This prevents problems from occurring when the contact data in RAM is incorrect because it has been updated by another Sumac user.

Payment Batch Status records can now define: who is allowed to alter a batch with the specified status, and what the next status must be.

## **Pledges**

A new preferences lets you specify that the Pledge List window should have buttons for editing the pledge-related lookup lists.

Pledges can be searched by group.

You can search to find pledges based on the donors' communication preferences.

## **Receive Email**

Receive Email window: the "to" recipient addresses is now an option for choosing which email addresses to identify within an email message in the Receive and Process Emails window. This means you can save communication records for contacts to whom you send email if you have bcc'd the email to Sumac.

## **Reminders**

Bulk Edit allows you to alter the What To Do field.

## **Sales**

Sales can contain a shipper reference number.

In a mail merge of sales records, an LI formula can include the SKU of a product.

Sales can be connected to an event.

In a mail merge, the shipping address <<v\_Shipping\_Address>> inserts the buyer's address if there is no shipping address in the sale record.

When creating a Sale record, you can enter negative quantities of products. This lets you handle returns of sold merchandise.

## **Tasks**

Tasks can specify mileage automobile travel expenses.

The connection of Tasks to GYO records is significantly enhanced. In addition to the task having buttons for connecting to a GYO, the GYO list window has these changes:

- When you expand a GYO record, it shows related tasks in addition to other GYO records related to the one being expanded
- The GYO list window has a button that lets you create a task for a selected GYO record.

## **Ticketing**

There is a report about ticket orders for an event that has the same financial details as the ticket orders report for event groups. Report Distributors can send this report automatically.

Delivery methods can now apply a surcharge to a sale or ticket order. (note that this does *not* yet work for tickets ordered through a website)

You can have up to 8 (instead of just 4) surcharges defined in a ticketing price scheme.

Ticket orders can contain a shipper reference number.

## **Time Dockets**

Time docket can specify automobile travel expenses.

## **Ledger Entries, Payments, and QuickBooks**

Sumac can send payments and ledger entries directly to QuickBooks Online using the QuickBooks API.

## **Website Integration**

When a new person using a charity's website (signup2 package) adds himself to the database, Sumac can automatically send him an email using a template stored in the database.

There is now a preference to tell the online transaction server to allow unrecognized postal codes in incoming mailing addresses. This enables people to be added to the database when they come from a country whose postal codes Sumac does not recognize.