



Version 4.2s.20 Release Notes

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Introduction

This document describes features which were added to release 4.2.19 of Sumac to create release 4.2s.20.

General

Email

When a bulk email transmission fails, Sumac can save the list of contacts who did *not* receive the email. If this list exists the next time you start Sumac, you have the option to resume sending to the remaining people.

Labels

The Labels and Envelopes window provides checkboxes to exclude each contact's prefix and suffix when printing labels.

General User Interface Changes

List windows support right-click mouse operations.

Almost all of Sumac has been translated to French. If you use the French version and notice some text that is in English, please let us know; we'll gather these together and translate them too.

Search panels can scroll horizontally, making them much easier to use on smaller computer screens.

The Print command in list windows can print some records in colour. This is done automatically for records that support colour (e.g. contacts, tasks).

If you want status reports for Bulk Email commands to always go to the same place, there is a Preference (in the contacts tab) to choose the directory to hold status files.

Security

Introduction

Sumac has many security features that allow you to control which users are allowed to see which data, and what they can do with it. In addition, Sumac is certified for handling secure payment data. This release adds several new security features as we continue to ensure state-of-the-art protection of your data.

Encryption Updates

The *databases.txt* is a file on each user's computer. It holds information about which databases a user is allowed to connect to. Database IDs and passwords stored in *databases.txt* are now encrypted instead of being stored in plain text.

Early (10 years ago) versions of Sumac allowed user passwords to be stored in plain text in the database. This is not longer supported. Any databases with plain text passwords will be automatically updated.

In addition, instead of hashing user passwords with SHA-256, we now use the more secure BCrypt algorithm.

General Security

The Edit Databases File command is now available only to admin users.

Sumac supports TLS encrypted connections between Sumac and the database.

The creation, editing, and deletion of user profiles is automatically logged.

The Utilities menu in the Sumac console window has a Change Password command that lets each user change his or her own password.

Drop-down menus that let a user choose another user are now restricted so that the user can only choose a user in his or her own segment(s).

Payment Security

Keys for encrypting payment data are stored in your database. They are now encrypted with 2048-bit encryption (formerly 1024-bit). These keys also require a password that is at least 20 characters long; this

sounds onerous but can easily be met by typing a sentence, line of poetry, list of names, or other long piece of text that you remember.

When payment credit card details are cleared, if some keys are no longer used for encrypting payment data, the user is given the option to delete these unused keys.

One feature required for secure systems is that they require you to re-enter your password after a period of inactivity. Previous releases of Sumac did this by relying on settings in the operating systems, but now Sumac does this itself. After 15 minutes of inactivity:

1. if you are an admin user, then Sumac requires you to re-enter your password
2. if you are not an admin user but can see payments, then you need to re-enter your password when you try to edit, create, or process a payment
- 3.. if you are not an admin user and cannot see payments, then Sumac does not require pass re-entry.

Auctions (Lots)

All reports for Lots have been moved from the Reports button to the Lots list.

Campaigns

In the Campaigns list window, the Show Contacts and Identify Contacts commands work in all the situations that a user might reasonably expect.

Collection Management

The Field Preferences command allows you to change fields in collection objects, and in provenance and location records. This lets you rename or hide fields.

Communications

The Communications list window lets you search for communications to a specific household.

Contacts

Facts

There is a drop-down menu of award types for award facts in contact records. The choices in the menu are set up in the Lookup Lists command.

The Contact's list window lets you can search contacts by recognition facts.

In the Contact's list window, the search by club membership lets you search by club name or type.

Search Builder lets you search for contacts by club name or type.

Other

Sumac automatically tracks the user who originally entered a contact into the database.

You can optionally add page breaks to the *info-details* report.

The Preferences dialog lets an administrator rename tabs in the dialog for editing a single contact.

The bulk editing of contact records can be logged.

Users who cannot delete contacts are no longer allowed to use the Resolve Duplicates command.

In past releases of Sumac, only an administrative user was allowed to make a contact *inactive*. This release provides a Preference to allow any user who can edit a contact to also set the contact to *inactive*.

The Resolve Duplicates command now allows up to four contacts to be chosen and merged at once.

Contacts – Search Builder

These new searches are supported:

- search by club name (in addition to club type)
- search pledges by event
- search tasks by end date
- search donations that were made from a pledge

In addition, searches for *first membership in a date range* run much faster.

Course Registration

Registrations can link to a third contact. This contact field is labeled "Contact 3" but can be changed (renamed or hidden) in Field Preferences. Field Preferences also allows you to alter the Initial Status and Final Status fields.

The Programs List feedback report has been converted to HTML, and now shows the booker contact as a column.

When a student is moved to a different session, the user is given the option to create an invoice.

The course registration payment status report can be generated and emailed to several students at once. Also, you can optionally have Sumac include payment notes to this report.

All Course Registration reports that were in the Report button are now in the Registration list window.

In the Registrations Payment Status window, if the allocation of a payment to a registration causes the registration to become fully paid, the user is asked if Sumac should mark the registration as paid-in-full.

Course Registration – On Website

A user registering for a course can:

- add other registrants (e.g. children or other family members) to the database
- register these other related registrants for coursed

Donations

The countries of the four primary contacts can be displayed as columns in the donations list window.

These new reports have been added to the donations list window:

- Payment Processed status
- Donations by Campaign, optionally with cheque number and date

Events

Event packages have a *Show On Web* flag.

Sumac web integration enables event packages (season tickets) to be sold and used on your website.

Events can be segmented. This restricts the Choose Event window by segment, causes the events list to show only events that are in segments the user can see, and causes the editing of a single event to be restricted to segments that the user can see.

When choosing or searching for an event group, the window for choosing an event group allows filtering.

Forms

Fields in forms cannot be divided into different tabs, so when editing the definition of a field in a Form, the tab name field is hidden.

You can limit the amount of text that a web user is allowed to enter into a long text fields.

Grow-Your-Own (GYO, Custom Modules)

You can optionally add page breaks to *info-details* reports in the GYO list windows.

If a GYO record can have parents, there is a link button in GYO records to show the parent.

GYO list windows have a View Children command to open a new list window showing the children of the selected record(s).

The Resolve Duplicates window shows a the title for each record being merged. The title is now the record's summary, rather than just its ID.

If a GYO record refers to a sensitive contact, then only users who are allowed to see sensitive contacts will be able to see the GYO record.

The definition of a contact field in a GYO record now includes a checkbox labeled *All members of a household*. If this checkbox is clicked for a field, then when the user creates a new GYO record, the user is prompted to choose a household, and Sumac then creates a new GYO record for each member of the household.

Big text fields in GYO records can be used to show checkbox groups in the user interface. If the checkbox choices are long, this enables you to capture all of them.

Sumac prevents checkbox choices in GYO text fields and Extra Fields from containing commas. Commas confused both database storage and also web presentation of these checkboxes, since comma is used to separate user-chosen values.

User Type security is enforced on GYO records that use schema entries with such security in them.

Import

Sumac can now import these additional types of data:

- Action Plans

- Action Plan Steps

- Event Packages

- Product Inventory records

In addition, the Import command is now able to *update* Grow-Your-Own records, in addition to importing them.

Import Workspace

Import Workspace has a button for clearing cells at the intersection of the chosen rows and chosen columns.

Mail Merge

Mail merge now supports a *g_user* variable in formulas.

Mail merge now supports a *strequals* function in formulas. The *strequals* function has two parameters: the first is a variable and the second is a string literal (with no delimiters of any sort). For example to test if the user is John, the formula would be *strequals(g_user,John)*. One use of this is to have different text in thank-you letters depending on the user who is doing the mail merge operation.

Mail merge now supports a new *strcontains* function. It works like *strequals*, but returns a true result of the first parameter contains (rather than equals) the second parameter.

Mail merge supports a *formatnumber* function. This lets you display a number in a mail merge document with other than two decimal places.

Membership

The membership list can export the middle name of a contact, and also any of the contact's phone numbers.

All Membership reports that were in the Report button are now in the Membership list window.

Notifiers

Notifiers can be restricted to specific segments. They are only activated when the current user is in the specified segment.

There is a new notifier for sending notification when a donation to a particular *fund* is added to the database.

Payments

When you create a completely new database, it contains a default *admin* user with password *admin*. This default user is no longer able to do things with payments unless the default password is changed..

The Mercury payment processor has been renamed to Vantiv.

Pledges

You can search in the pledges list by payment type.

Prospect Rating

Prospect Rating algorithms can specify a group to which they apply.

QuickBooks

The window for editing databases.txt (Utilities/Sumac Administration/Edit Databases File), does not show database user IDs and passwords in the scrolling list. You can see the database user ID and password by double clicking an entry in the list.

If a user is allowed to see invoices, ledger entries, or payments, and is logging into a multi-user database that interfaces with QuickBooks Online, and the connection to the database is not encrypted, then there will be a warning message telling the user that in a future version he will not be able to connect without encryption.

When Sumac starts up, it checks for a connection to QuickBooks, and resumes using it if it is still alive.

Submissions, Auditions

Field Preferences are supported for Submission records

Ticketing

Long seat names (prefix 1 and prefix 2 in a seat block) display better in the window for ordering tickets.

Ticketing – On Website

You can now sell event packages (season subscriptions) on your website, and pay for tickets with a previously purchased subscription.

Time Dockets

Two new report show time docket by department: one lists time by department, the other breaks down department docket by program.

In the Contacts List when adding a time docket to several contacts, Sumac no longer allows the worker field in the time docket to be edited.

Volunteers (Tasks)

In the Tasks List window, the colour for skill facts works a bit differently: it is green if the contact has the skill and it has been checked. It will turn yellow if there is a to-be-checked date that is in the past.

When a user can edit volunteers and tasks, the user will also be able to edit the lookup lists in that area of Sumac.

Task records have a new count field, which you can use, rename, or hide by using Field Preferences.

Website Integration – General

You can specify a maximum length to be used for a form big-text field on a website.

The Preferences dialog now restricts drop-down menus of templates that are used by a website to allow only those that are stored in the database. This means that the server using the template will be sure to be able to use the template.

When addresses are entered on a website, a business-residence-address flag causes the entered address to be put in the contact's business address instead of in his residence address.

Long text fields in Grow-Your-Own records and forms can be displayed on websites as multi-checkbox text fields. This provides support for very long names on checkboxes.

Grow-Your-Own and form field definitions can specify a maximum field length. They can also specify a variable name for mapping the field to another type of record (used when entering a contact while registering for a course).