



Version 4.3s.1 Release Notes

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Introduction

This document describes features which were added to release 4.2s.20 of Sumac to create release 4.3s.1.

General

Working with the Sumac user community, we have started translating Sumac into Spanish.

When a user Quits Sumac, all his or her locks are cleared. This ensures that records the user was editing become available to other users.

The search criteria at the top of list windows support *and-not* (in addition *and* and *or*).

Individual schema entries can be marked inactive, so that users can no longer choose them.

Time zones can support time offsets that are partial hours.

The formatting of Australian phone numbers has been enhanced.

If a user log-in fails, show the user a list of admin users who can help her.

When a user changes his password, tell him the change succeeded.

The inactivity timeout works better, requiring re-validation only for tasks that have security implications. This makes it less intrusive.

Accounting Integration

Sumac now integrates with Intacct accounting (in addition to QuickBooks and Sage 50).

Auctions

Lot records now support extra user definable fields. You can have up to four each of check boxes, amounts, and counts.

The new fields can be made available through Field Preferences, which also allows control over other fields in Lot records.

Bulk Email

The allowable size of Quick Compose emails has been doubled from 3000 to 6000 characters.

When sending attachments that are different for each email, Sumac allows multiple emails to be sent to a single recipient.

Campaigns

When showing a list of campaigns, Sumac efficiently determines, in advance, which ones are expandable.

The loading of donation summary information for campaigns is much faster.

Communications

You can record the creation and editing of communication records in the security log.

Collection Management

The collection objects list window now has many new search criteria, including Show All.

Several new pieces of information can be displayed as columns in the Collection Objects list window.

Contacts

Each user can choose which columns to show in the window for choosing a contact.

Each user can choose which columns to show in the Relations tab of the window for editing a contact.

Search Builder and the contacts list window let you search for contacts by the amount of known planned gifts.

When a contact is deleted by Resolve Duplicates, Sumac can record this in the transaction log as a special type of contact deletion.

A Sumac administrator can use the Preferences window to specify the last name to be used for contacts whose last name is unknown.

Course Registration

When a new registration is created, if your database defines a relationship for connecting payers and registrants, and the payer and registrant are not related, Sumac asks if you want to relate them and does it for you.

Donations

These additional columns can be displayed as columns in the donations list window:

- donor address
- donor phone
- donor salutation
- donor contact types
- donor gender
- in-honour contact gender

The donations list window lets you search donations by donor and in-honour country.

Generation of receipts allows you to save all or none of them into the database. This is useful when the receipt creation process may not have completed correctly.

When a donation is Duplicated, the following fields are no longer copied into the duplicate record:

- the user who entered the donation,
- the date when the donation was entered
- the Reconciled checkbox

When a donation receipt is cancelled the *receipt-cancelled-by* message is prepended to the contents of the donation's Notes field rather than replacing the existing note.

Ledger entries created from donations that are linked to a pledge now check for a specified fund that specifies accounts, or a single account in the donation itself, before using the default account specified in preferences.

Events

The Events list window lets you hide inactive events, event groups, and event packages. This enables you to greatly simplify the window, showing only current relevant information.

In the Events list window, when you expand an event group to show its events, you can double-click the event to view and edit it.

Field Preferences

We continue to extend Field Preferences to let you customize different types of records:

- There are field preferences for Time Dockets.
- There are field preferences for Auction Lots. These let you use additional optional fields: up to four counts, four checkboxes, and four amounts.
- Field preferences can support changes to Funder Requests, including the Amount Received field.

- Field preferences support additional customization of Task records, including making the Task Type field mandatory.
- Field preferences allow many customizations of Collection Objects.
- Field preferences can support changes to Pledges.

Grow Your Own (GYO) and Forms

You can search GYO records based on their parentage (e.g. show children, not parents).

In Search Builder, you can choose dates using the standard tools instead of having to manually enter them.

You can edit the contact in a form.

Invoices

There is now a Print Receipt button for the Invoices list window. You can configure it to use a specific template for generating the invoice, thereby greatly speeding up the printing of the document.

Mail Merge

The last release introduced a new window for gathering information needed to perform a Mail Merge operation. This new approach has been implemented for some additional lists: GYO, contacts, campaigns, and course registrations.

Also, that new Mail Merge window has been enhanced:

- Language-specific template choices are simplified by asking which languages are of interest instead of assuming you want different templates for all languages.
- The window remembers settings from the last use of Mail Merge.
- The window allows you to backtrack, changing settings that formerly could only be specified once.

Memberships

When a payment is created from a membership that has a billing contact, use the billing contact instead of the member as the payer contact in the payment record.

Membership types can have account codes, which cause the membership fees to be allocated to an account based on the type of membership.

The window for editing a membership contains a button to link a membership to its related donation.

You can now search the Memberships list by payment type and by member's first name.

Notifiers

Email messages generated by notifiers include the segment that is in the notifier (if there is one).

Donation notifications include the segment of the donor (if there is one).

Pledges

You can log the creation, editing, and deleting of pledges.

The Pledges list lets you search by the user who entered the pledge, and also by the end date of the pledge.

Reminders

A Sumac administrator can set a Preference to show complete reminders (in addition to incomplete ones) in the history tab of a contact record.

Sales

Field Preferences have been extended to enable more control over Sales records.

SKU can be used to filter products in the list of products on the left side of the Sales dialog.

Ticketing

Ticket order financial summary reports show additional columns and tables of information. They now include adjustments, coupons and donations in the payment method summary. There is also a new payment application table to show total amounts paid in each of these categories.

The Print Tickets command in the ticket orders list window provides additional options for deciding what to print.

Search Builder supports searching ticket orders for contacts who bought tickets to at least a specified number of events.

Time Dockets

A Sumac administrator can specify that a task type is not selectable.

Tour Booking

All types of records (programs, workshops, personnel) that record financial information contain an extra field to hold planning hours

Volunteers and Tasks

A Sumac administrator can specify that a task type is not selectable.

A major new Task Summary report lets you define and produce a report that creates a summary of your tasks, aggregating precisely the information that you need.

In the Tasks list window, the list of workers on the right hand side shows only workers who are in segments that the user is allowed to see.

Website Integration: General

The fields for entering a person's contact information include a field for entering an apartment number.

Sumac website integration can send a diagnostic error email when a payment is processed but not saved to database.

Website Integration: Donations

Defaults for donation type and event can be specified (in a *userdata* parameter) for donations, including donations received through Course Registration, Ticketing, and Membership Renewal.

Website Integration: Course Registration

The definition of a session allows you to specify that registration in a particular session is only allowed if a contact has a particular type of membership.

You can solicit a donation when a registration is added.

Website Integration: Grant Applications

Over 50 enhancements to this module simplify the task flow, enhance stability, and clarify messages.

Website Integration: Memberships

You can solicit a donation when a member creates or renews his or her membership.

Website Integration: Ticketing

You can solicit a donation when a patron purchases tickets.

You can show the number of seats available in the seating-plan display of your venue.