



Version 4.3s.2 Release Notes

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Contents

Introduction	– 3
General	– 3
Security	– 3
Accounting Integration	– 3
Awarding Grants	– 3
Bulk Email	– 3
Campaigns	– 3
Contacts	– 3
Course Registration	– 4
Donations	– 4
Grant Management	– 4
Grow-Your-Own (GYO) and Forms	– 4
Invoices	– 4
Ledger Entries	– 4
Mail Merge	– 5
Memberships	– 5
Pledges	– 5
Products	– 5
Reminders	– 5
Sales	– 5
Ticketing	– 6

Time Dockets – 6

Website Integration: GYO – 6

Website Integration: Volunteer Sign-Up – 6

Introduction

This document describes features which were added to release 4.3s.1 of Sumac to create release 4.3s.2.

General

We continue to enhance Field Preferences to provide you with more control over the fields in individual records:

- Field Preferences display both the original and the changed field names.
- Field Preferences are now available for Membership records.

The Export button allows you to export to .CSV file format, which opens smoothly into most spreadsheets. Sumac's dictionaries and spell checker are enhanced to deal with apostrophes.

We continue to enhance Sumac's French and Spanish translations. Please let us know if you see areas with weak or missing translations.

Schema entries can be marked as *Inactive* to prevent users from choosing them.

Security

There is a user privilege to specify that a user is allowed to create donation receipts.

The connections to payment processors restrict the list of available cipher suites to ensure adherence to the Payment Application Data Security Standard (PA-DSS) when connecting to payment processors.

Support for TLS-encrypted connections to databases was put in two places in the Use New Database command:

- click "Existing Database"
- click "Multi User Database"

Accounting Integration

Sumac is now able to better communicate with Intact accounting platforms through improved API's.

Awarding Grants

You may now show the average of the reviewers' ratings as a column in the list of Grant Applications.

Link icons in the Grant Application let you go directly to any contact's details.

When building a Grant Application Type in Utilities/Customize Database/Lookup Lists, you can make attachments mandatory for an applicant.

Bulk Email

Sumac now automatically includes a text version of the body of an e-mail in addition to an HTML version. This change was made because recently some spam filters have started blocking emails that are HTML-only.

Campaigns

Campaign reports are no longer accessible from the Report button on Sumac console. Reports are now accessed from Analyze & Report in the Campaigns list window.

Contacts

A new preference lets you give non-admin users the ability to change inactive contacts.

A new preference allows you to hide the Facts tab in contact records. Use this if your organization never works with facts.

You can now restrict the visibility of each extra field to one or more contact segments. A user is now able to show each contact's membership type and expiry date as columns in the contacts list window.

You can show the ID and name of the last event attended by each contact, as columns in the contacts list window.

Gender is now a regular lookup list and drop-down menu. Now an admin user is able to add and change the gender drop down options in contact records through Utilities/Customize Database/Lookup Lists.

Course Registration

Programs now have a Show On Web flag that determines which programs are displayed in the Volunteer Sign-up page on your website.

Mail Merge now allows for grouping registrations by Billing Contact.

Session start and end times are now available as Mail Merge code options.

Payment allocation options have been improved in Registration window. Sumac allows you to apply payment to selected course registrations, instead of defaulting the payment to the oldest unpaid course.

Donations

New Original Amount fields have been added to the Donation window to support donations in foreign currencies. If you want to use them, can use Field Preferences to show these fields. This change does not affect existing donation amounts or receipting.

The Donor Roll report in the Donations list window now shows: individual donation amounts, funds, campaigns and a more intelligent rendition of Donor Recognition. This report can now completely replace the old Donor Roll that was in the Reports button in the Sumac console window.

A new user capability allows an admin user to specify which users are able to perform the Make Receipts command for donations.

Grant Management

When a Grant Application is edited, the names of the attachment fields are taken from the grant application type, set up by the Sumac administrator.

Grow-Your-Own (GYO) and Forms

In GYO records and forms, the formulas that calculate values for a field can now give a value to a contact ID field.

Invoices

When you perform a mail merge operation on invoices, the iv_charge_details_customer variable shows more information to assist in creating a detailed invoice document.

When an invoice is to be deleted, Sumac supports the option of deleting payments that are directly related to the invoice.

Sumac now supports an Invoices Receivable account, which is used to generate ledger entries for partially paid invoices providing full support for accrual accounting.

Ledger Entries

Sumac now supports net ledgerizing. If you turn on the Net Ledgerizing preference then edit a record, Sumac creates ledger entries that record the difference between what the old record created and what the new one requires. This enables you to keep Sumac ledger entries synchronized with ledger entries in your accounting system. Note: Without this new feature, when you edit a record that creates ledger entries (e.g. a donation, an invoice), Sumac deletes all the ledger entries that relate to that record, then creates new ones.

The Contact Summary report in the Leger Entry list window is cleaner, and shows correct debit and credit totals for each contact. This helps you track down and resolve imbalances in the ledger entries.

Mail Merge

When performing a Mail Merge with an HTML template containing a list (LI) formula, Sumac produces an entire table, complete with column headings. So you no longer need to manually create the header row in the template.

Memberships

The Membership list window now has a Print Receipt button, which does a mail merge operation on the selected memberships to produce a receipt (or any other type of document), and sends the resulting document directly to the printer.

Each Membership now includes three new fields: a cancellation check box, cancelled date, and cancellation notes. The Sumac administrator can use Field Preferences to hide or change these fields. Cancelled member

A membership record can be connected to a campaign to help you track campaign success.

Pledges

Bulk Edit can now change the account fields in pledge records.

Pledge reports can no longer be accessed from the Reports button in the Sumac console. They are now accessed by clicking Analyze & Report in the Pledges list window.

You can search the Pledges list for overdue pledges.

Products

Product Inventory records appears when you expand a contact in the contacts list and also appear in the history tab of a single contact.

Sumac now records inventory changes in a (slightly) new way. When a sale is made that changes inventory, Sumac will not delete the old records of inventory changes. New inventory changes will be added and accumulated that will result in a correct net amount being recorded.

You can view the total value of stock on hand directly from the Products list window. A Quantity On Hand (QOH) column is now available that will show this information to the user.

Sumac automatically calculates the QOH for a new product when it is added along with a Product Inventory Record.

Product Inventory records now support a Notes field.

You can display a product value column in the products list. It is calculated by multiplying the product price and its QOH.

Reminders

You can specify that a step in an action plan is inactive. This option causes the step to display in grey, and not be clickable.

Action plan steps can send an email. You can now specify which contacts should receive the e-mail based on their relationship to the contact in the reminder itself.

Sales

You can search sales by Discount.

A user who is allowed to view and access product and inventory records can do this from within the Sales list window.

The Invoice button now shows invoices created from within the Sales list, as well as invoices created from outside of the Sales list that included sales.

Products shown in the Sales list window will now only be those that are directly related to sales. This change removes course registration products from the sales list.

The Sales window now has a re-ledgerize command that re-generates ledger entries for the selected sales.

Ticketing

There is a new Event Group Summary report in the Ticket list window. This report provides extensive information about sales of tickets to all events in a selected event group.

When a middle seat is given a weight outside the range of weights of the low and high seats, Sumac adjusts the weights appropriately.

You can customize the order in which coupons and taxes are applied to a ticket order. In the past, Sumac always applied coupons after calculating surcharges. Now a preference lets you change this so that coupons are applied before surcharge calculations.

Time Dockets

All Time Docket reports now factor in the Worker Count field. If a time docket in a report has a worker count greater than one, then the worker count is used to adjust the total duration of work.

Website Integration: GYO

Header text and help text defined in the definitions of fields in Grow Your Own records now show up on your website.

Website Integration: Volunteer Sign-Up

A new feature has been added to Sumac Web Integration: Sumac is now able to support a Volunteer Sign-up web page. This addition includes notifier functionality to alert relevant parties of new volunteer sign up.