



## **Version 4.4.0 Release Notes**

2016-11-17

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## Introduction

This document describes features which were added to release 4.3s.2 of Sumac to create release 4.4.0.

## Security

Several enhancements were made to the security of payment information, bringing Sumac into compliance with the new PCI-DSS (PA-DSS) 3.2 standard.

Administrator users are now able to set a security preference telling Sumac to log the creation of contact records.

The Sumac administrator can restrict which commands are available to a user:

- Specify that a user is allowed to use the Resolve Duplicates command, even if the user cannot delete contacts. This is a user profile setting in Utilities/Sumac Administration/Users.
- Specify that only admin users are allowed to change time docket. This is a preference in Utilities/Customize Database/Preferences.

## General

### *Quick Mail Merge*

Sumac has a new Quick Mail Merge command which expects one incoming template, and creates one output file. It is available in the following list windows:

Collection objects	Grant Applications	Products
Payments	Invoices	Proposals
Campaigns	Job Openings	Reminders
Contacts	Look-up lists	Sales
Grow Your Own	Lots	Submissions
Forms	Payment Batches	Tour Booking involved contacts
Fund Requests & Programs	Pledges	Ticket orders

### *Export – Open On Completion*

A check box in the export dialog tells Sumac to open the new file when the export completes. This checkbox causes Sumac to open the file using the default program on your computer for opening the chosen output file format (.txt or .csv).

### *Column Selection*

Sumac now allows you to shorten the list of field names in the column selection dialog by typing in the field name you are looking for.

### *Date Formats*

Sumac supports entry of dates in the following additional formats:

- yyyyymmdd
- yyyy.mm.dd
- yyyy/mm/dd
- Date, mm dd, yyyy AD

### *Field Preferences*

Field Preferences continue to be enhanced. You are now able to set field preferences for products and grant applications.

## *Language Support*

We continue to improve Sumac's support for Spanish and French, translating more of the user interface into both languages.

In addition, most Sumac lookup lists can now hold multi-lingual strings. The language variants are separated by ^ characters. Sumac expects the languages as follows: *English^français^Español*. Any language can be omitted, for example: *English^^Español*. Sumac shows each user the language variant that corresponds to the language he or she has chosen.

## **Awarding Grants**

Several additional search criteria are available in the grant application list window.

Notifiers can now specify several notifications to take place when specific grant application events occur. In addition, you can now specify whether the notifier email should include the contents of a grant application form.

## **Communications**

You can view contact fields as columns in the communications list.

Searching in the Communications list window has been enhanced by the addition of a General Control.

## **Contacts**

Extra fields can now be schema.

A user is now able to edit the time zone field in contact records by using the bulk edit command.

If the U.S Postal Standard country preference is selected, the zip code field appears before the country field in a contact record.

A user is now able to specify columns to be displayed in list builder.

## *Search Builder*

Search Builder has two new commands:

- Add To Connector: click to select a box and a connector then use this command to connect them
- Disconnect: select any two boxes then use this command to disconnect them

Time docket searches can now search by activity type.

Pledge searches can search by several additional fields.

## **Course Registration**

Sumac now displays additional session details in the window used to edit a course registration.

If you have set up a discount based on the registrations of other household members, then Sumac now determines which contacts are household members in two ways:

- household relationships, and
- relations based on the relationship type defined specifically to connect people in the course registrations module.

## **Donations**

New search types are available in the donations list:

- *Show All*
- *Notes*
- Search based on the type of records a donation is linked to, e.g. a ticket order or membership

Sumac now allows a user to set email notifiers for a range of donation values instead of just the minimum donation value.

You are now able to reload the donations list without closing it by using the Refresh command.

A *benefit received* field can be displayed in the donations list window and used for mail merges, exports, and prints. This field shows the difference between the total amount and the receiptable amount of the donation.

## **Grant Management**

You can search funder requests by report due date.

## **Grow-Your-Own (GYO), Case Management, Forms**

You can now search GYO records by a contact's first name.

Two new types of fields are supported in GYO records:

- a contact picture field, which shows the picture from the contact record of a contact identified in the GYO record
- a campaign field, which connects the GYO record to a campaign

Contact fields in GYO records can be limited so that they allow only the selection of contacts with specific contact types.

## **Import Workspace**

The import workspace has new buttons:

- Undo: undo your last action
- Redo: repeat your last action (after pressing Undo)
- Find and Replace: Repeatedly find and replace pieces of text.

## **Invoices**

Sumac alerts you when you are about to cancel an invoice with a processed payment, warning that the payment will not be saved.

## **Ledger Entries**

Sumac allows you to search ledger entries by payment batches.

## **Memberships**

The General Control is available with searches in the memberships list.

A membership type can specify up to three default credit fee accounts. These are automatically used when a membership of that type is created.

A preference (Utilities/Customize Database/Preferences/Memberships) can tell Sumac to show the memberships of all household members in each member's contact history.

## **Payments**

Sumac now automatically uses additional country short forms for Australia (AU) and New Zealand (NZ).

## **Pledges**

The General Control is available with searches in the pledges list.

## **Sales**

Each user can specify which product columns to display in the products section on the left side of a sale window.

## **Ticketing**

You can specify that coupon discounts are to be applied *before* surcharges are applied to a ticket purchase. This preference can be set in Utilities/Customize Database/Preferences/Ticketing.

## **Website Integration**

### *Awarding Grants*

Sumac's web integration service for Awarding Grants now supports online Final Report submissions from reviewers.

### *Course Registrations*

Sumac now checks if a student has an eligible grade before a user is allowed to pay.

At check out, Sumac determines a student's eligibility for a discount based on both registrations already saved in the database as well as other registrations in the shopping cart.

### *Ticketing*

Sumac can now support a URL in the description of an event package. This descriptive information is available on your website.