



Version 4.4.1 Release Notes

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Introduction

This document describes features which were added to release 4.4.0 of Sumac to create release 4.4.1.

Security

For many years, Sumac has been certified for processing payments. This enables our customers to conform to the requirements of the PCI-DSS standards for securely handling credit cards. Sumac was recently re-certified to the newest 3.2 standard.

General

Appearance

Buttons resize based on the text that is in them. This means that button legends that were sometimes truncated in different languages, or buttons that show text that you have defined in your database, now size themselves appropriately.

Emailing

As spam filters around the world evolve, they add further criteria that they consider to indicate that a message is spam. Sumac has changed how it sends bulk email to avoid some commonly used flags, which should reduce how frequently your bulk mail is flagged as spam.

Field Preferences

You no longer need to restart your database in order for changes in Field Preferences to come into effect

Lookup List

The lookup list window for defining and editing a schema has a button that lets you also edit the entries in that schema.

Quick Count Report

We have made several enhancements to the Quick Count report located in the Contacts, Communications, and Grow-Your-Own Lists. These enhancements include a grouping feature and new fields.

Accounting Integration

When exporting to Quick Books, Sumac now includes contact address information.

Awarding Grants

You are now able to apply a general control to a search in the grant applications list, as well as load a past search or save the current search settings.

Communications

A number of changes have been made to the Communication Type lookup list:

- Sumac now tracks who created a communication type and when
- There is a new purpose field to record your intended use of this communication type
- You can also mark the date that this communication type became inactive

Note that these fields do not appear anywhere else in the database, as they are only for administrative purposes.

Contacts

You are now able to search the final status of Course Registrations in Search Builder.

Course Registration

You are now able to search the final status of Course Registrations in Search Builder.

Donations

You are now able to search for donations that have not been assigned to a batch in the Donations list.

You can now assign Funds to different segments. This change provides better control over which Funds certain users are able to see.

Events

You can now bulk edit event types from the Events list.

Forms

Forms now appear in the contact history of any contact linked within the form, not just under the primary contact.

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

The Print button in GYO records and Forms now produces an HTML report. This change improves the appearance of printed reports and also allows inclusion of extended Notes fields.

You can now search long text fields in GYO records.

You can now view any contact information as a column in Grow-Your-Own, Case Management and Form record lists.

You can now export checkbox groups in Grow-Your-Own records as columns. Each checkbox in the group shows as a column in the export with 1/0 values to indicate if the box is checked. This is useful for statistical reporting.

Mail Merge

You are now able to mail merge any fields from contacts who are referenced by the primary record being mail merged.

Memberships

The Membership record now has four additional contact fields available that can be enabled through field preferences. Enable and rename these fields if you need the ability to record and search more than one contact for a Membership.

Pledges

The Pledges list now has a search type that allows you to find only pledges that have irregular payments or only regular payments.

Sumac now processes online pledges in a different way. When a donor makes a pledge, Sumac may and may not process an immediate donation – the first in the pledge. If the pledge is being made less than two weeks after the regular pledge processing date, then a donation is processed immediately.

Products

Sumac now supports two new fields for *product type* that help describe your product with a drop down menu for better searching and reporting.

Sales

An administrative user is now better able to define how Sumac applies discounts to items. When creating a discount in Lookup lists, you can now specify whether it is calculated as a fixed amount per item, fixed amount per order, or as a percentage.

Ticketing

Sumac has an additional way to import tickets into ticket orders. You are now able to import specific seats with independent discount levels as opposed to a bulk import under one discount.

Website Integration: Donations and Pledges

Sumac now processes online pledges in a different way. When a donor makes a pledge, Sumac may and may not process an immediate donation – the first in the pledge. If the pledge is being made less than two weeks after the regular pledge processing date, then a donation is processed immediately.