Version 3.2 Release Notes

September 25, 2009

Contents

Introduction

This document describes features which were added to version 3.1 of Sumac to create version 3.2.

Do You Need To Install This Release?

Check Your Current Release Number

Run your current version of Sumac. At the bottom of the Sumac Console window is a status line that indicates which version of Sumac you are running.

Currently Using 3.2

If you are already using release 3.2 (on a pre-release basis, or because you just started using Sumac recently), then your software has already been updated automatically. You do not need to do anything to install this new release. But you may want to read the notes below to learn about all the new capabilities of release 3.2.

Currently Using 3.0 or 3.1

If you are using release 3.0 or 3.1, then you should read the rest of this document and install the new release.

Currently Using Older Than 3.0 (2.4, 2.5)

If you are using an older version (2.4, 2.5) then you *must* upgrade very soon. We no longer support these old releases.

Please let us know if you are in this situation and we will step you through the update process.

The change from release 2.x to release 3.x employs new installation and upgrading technology (as described in detail in the release notes for release 3.0) which makes future upgrades largely automatic.

Installation of This Release

Before Installing This Release

This release updates the structure of your Sumac database. **Ensure that your database is backed up before running this new version of Sumac.**

Installing This Release

Go to Sumac.com and click Support. Click "here" to install release 3.2. Click the appropriate "Install" for your computer.

The first time you log on, Sumac updates your database structure; this may take a few seconds, perhaps a minute, so wait while it is being done.

Documentation

Current documentation for this release is available on the Sumac web site. Go to Sumac.com, then click Support. Scroll down to the documentation section and download or view what you need.

Communications

There is a communications explorer that lets you examine communications, for example:

- for an event: who was invited, who replied, who actually attended
- for performances: who came to one, to two, to both
- compare attendance at two or three events

It produces a Venn diagram (overlapping circles with counts in each intersection area) showing up to three sets of communications and how they relate to each other.

Contacts

Create Contact While Choosing A Contact

Throughout Sumac you are often asked to choose a contact: one who made a donation, received a communication, purchased a ticket, rejoined the membership program, etc. The standard dialog used for this purpose now allows you to create a New contact if you discover that the contact is not already in the database.

Copy Address To Clipboard

There are new Copy To Clipboard buttons in the Residence and Business address tabs of each contact record. These buttons copy a contact's mailing address to the clipboard so it can be pasted into other applications e.g. to address an envelope or letter in a word processor.

Facts

Three new types of Facts can be entered for Contacts:

- Giving History
- Assets
- Known Planned Gifts

These were formally available only to Sumac installations that licensed the Proposals module. Now they are part of Sumac Roots so they are available to all Sumac installations.

General

Fields to Show buttons have been replaced with a small icon button positioned beside the columns that it applies to.

Most lists had a Show Contact button. Show Contact buttons have been renamed to Show Contact(s). These buttons now show contacts for whatever records are selected. If one contact is identifed, then its contact record is opened. If multiple contacts are identified, then the contacts list appears with all the selected contacts showing.

Other than text files, Sumac creates three types of files in its own special formats: saved search criteria, report layouts, and SQL import specifications. These files now have a distinctive leaf icon. Double clicking one of these files causes Sumac to run, but Sumac does not open the double clicked file (coming soon...).

There is a Show Configuration command in the Utilities menu. It shows information about the database server and the options that have been licensed in your Sumac database.

Grow Your Own

The Grow Your Own list window now supports sending emails which merge in data from the Grow Your Own records.

Grow Your Own records can have up to 8 currency fields instead of the old limit of 2.

Import Workspace

The import workspace has a new button that looks up contact names, and puts their IDs into a new column.

Labels

In the dialog for printing labels, you can click on the picture to choose the first label to be printed.

Printing of labels to generate name tags has been enhanced. The available fonts (chosen automatically by Sumac) are larger, and formatting and spacing within the label is more aesthetically pleasing.

Mail Merge Templates

Sumac now allows you to specify that a template is "frequently used". When you need to choose a template, a drop-down menu of frequently used templates appears. Choosing from this menu is much faster than navigating through your computer's file system to find a template file. It also allows you to give meaningful names to the templates (which names appear in the drop-down menu) rather than trying to remember the corresponding file names.

Multi-Databases

This entirely new module is now available.

Sumac Multi-Databases enables a single Sumac *master* installation to create databases for use by other *subsidiary* organizations. Each subsidiary database operates exactly like a regular Sumac installation. The master organization is able to perform searches across all subsidiary databases. The master organization is also able to send communications (mail merge, labels, email) to selected contacts in the subsidiary databases.

This functionality is designed to support situations like these:

• An arts service organization manages several Sumac databases, one for each of its clients.

• A national umbrella organization centralizes the management of data in Sumac databases, but provides all the functionality of Sumac to each regional office.

• A computer network service provider makes Sumac available using an SaaS (Software as a Service) business model. This entails providing Sumac to any organization that wants it, usually charging a monthly fee.

Payment Processing

Payment Processing used to be an optional Specialized module. Now it is part of Sumac Roots so it is available to all Sumac installations.

Previous versions of Sumac supported credit card processing by IATS. Sumac now supports processing by BeanStream as well.

Reminders

Reminders can be presented in a calendar view. This view can switch between day, week, and month views. It shows appointments in their appropriate date and time slots. It shows reminders in the slot based on their bring-forward dates.

Sales

The sales list now has a Mail Merge button so you can generate documents about sales directly from this list.

Ticketing

There is now a two-level menu for selecting the event when the same event (e.g. a performance or presentation) is being presented on more than one date.

Time Docketing

New reports organize time docket information in various ways.

Tour Booking

This entirely new module is now available. Sumac Tour Booking enhances Sumac to enable it to help non-profit organizations which perform tours in a variety of venues. For example, an authors assembly that arranges authors to speak in long-term care facilities, or an opera company that places opera singers in school class rooms. Tour Booking assists with:

- scheduling one or more performers
- generating and paying performer invoices
- billing venues where performances occurred
- allocating contributions (e.g. grants) to multiple performances.

Users

The dialog for entering and editing a user's profile now has a button for generating secure passwords.