Version 3.2p Release Notes

February 8, 2010

Contents

Introduction

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

Accounting Integration

In order to enhance integration with accounting software, Sumac now has account code fields in payments, course registrations, donation types, and lots.

There is also a journal report to summarize by information in the form that bookkeepers (and accounting software) like to see it. This makes reconciliation to financial records easier.

Smoother integration with accounting is an ongoing initiative, so if you have suggestions in this area, please let us know.

Auctions

The Lots list allows you to search by the title of an art work. If you ask it to search for *ABC*, it finds every lot where the title contains *ABC* (case insensitive).

Search Builder supports powerful searches by Lot, searching by many possible criteria.

There are many new built-in reports to summarize lots by donor, artist, lot number, price, and city.

Communications (Case Notes)

Some organizations use Sumac to store case notes or similar documentation about their clients. These are often subject to various legal regimes regarding editability.

To better support this use of Sumac, you can now make communications uneditable (by anyone) once they have been entered. This uneditability feature is applied to certain communication types. So use the Lookup Lists command (in the Administrator menu) to change the communication types that apply to case notes, setting a check box that tells Sumac to not allow these types of communications to be changed.

Contacts

A new gender – *Trans* – is supported.

In postal addresses, street address fields can be longer.

Extra Fields can have much longer names.

Fund Requests

Many new fields were added to fund requests.

Tour Booking Programs integrate with Fund Requests, so a successful fund request can identify the programs that it funds.

Grow Your Own

Many enhancements have been made so that Grow Your Own is more flexible and also so that integrates completely with other Sumac modules.

In the Grow Your Own list, in addition to the specific searchable fields you define, there is a generic field search that works much like a field search in a contact record. It lets you choose a field, a relationship, and a value to be found.

Grow Your Own searching has been further enhanced by allowing you to specify a Group (see Search Builder) to be used to choose Grow Your Own records.

When you expand a contact in the contacts list, Grow Your Own records will appear and be selected and sorted based on the first date in the records. They also appear in the History tab in contact records.

In Search Builder, you can search for contacts in Grow Your Own records.

Finally, fields in Grow Your Own records have been further enhanced to support formulas. You can enter a formula that causes one field to be given a value calculated from the values of other fields. For example, if the Grow Your Own record represents a product order, and has fields to hold quantity and unit price, you could add a third field to multiply them together to get a total price, a fourth field to calculate sales taxes, and a fifth field to compute a grand total.

Import Workspace

Import Workspace can now concatenate multiple columns of data, inserting appropriate separator characters.

It can also correct postal codes, dealing with common character substitutions: O for 0, I for 1, Z for 2, etc.

It can also look up names and provide contact ID numbers for them.

Membership

You can now define up to two extra numeric fields in membership records. This enables you to track historical information (e.g. a member's budget size) in membership records.

Use the Preferences command in the Administrator menu to provide names for one or both of the fields, then restart. The fields appear in membership records.

Ticketing

Search Builder allows you to search for contacts based on ticket order details.

Time Dockets

Some organizations use Sumac time dockets to track billable time. Sumac has been enhanced to support billing based on time dockets.

You can now specify an extra field to hold a billing rate in each contact record. The rate that is applied to the time in a particular docket is the client's rate, if one is specified, otherwise it is the worker's rate. Mail merge can use this feature to generate invoices.

There are additional reports for time dockets.

Tour Booking

This feature first went into production use in August 2009, so it has had many enhancements in the last few months. Here are some of them:

School grades can be alphabetic (e.g. JK and K) as well as numeric.

A single workshop can have up to three teachers associated with it.

The Involved Contacts list:

- can show billing notes.
- allows direct editing of the fee amount. When you change the fee amount, the GST is recalculated, and the total is recalculated too.
- shows the venue.
- has a Set Values button that lets you set several dates at once instead of just one at a time.

Tour Booking records show in contact expansion and in the contact record history tab (for the booker).

In the calendar, workshops show grey if their booking status indicates that they should. If a workshop has no booking status, then the booking status of its parent program is used.

The Programs list has a Statistics button that shows key statistics about the programs showing in the list.

When you view (e.g. in the calendar view of the data) the field that shows a list of personnel in a workshop, if the contact is owed any money there is a bullet after his/her name.

A Change menu in each program record allows you to edit all of its workshops simultaneously.

Tour Booking Programs integrate with Fund Requests, so a successful fund request can identify the programs that it funds.

Volunteers

The Tasks list now has a Show Contacts button.