Version 3.3b Release Notes

August 31, 2010

Contents

Introduction

This document describes features which were added to release 3.3 of Sumac to create release 3.3b.

General

In addition to the blue and green colour schemes already supported by Sumac, there is a new one: autumn. It uses reds, browns, and oranges – seasonally appropriate for our Northern Hemisphere clients.

Sumac is now able to integrate with your website. At present, this works for ticketing – you can have an online box office (see below). We are extending this capability into other areas; the next will be the ability to accept donations online, directly from your website to Sumac with no intermediaries. Let us know if you are interested in this capability.

Contacts

Remove Duplicates

The Remove Duplicates process has been improved so that if you have a lot of duplicates to remove, it goes much faster. These enhancements were added:

- a keyboard shortcut for the Duplicates button
- the window that shows two contacts, and lets you compare and choose fields, now has an option to show only fields that are different
- the resulting contact (the one formed from the two original ones) is selected in the contacts list when the process is finished.

Postal Codes

You can specify which postal codes Sumac should consider to be valid, choosing from any combination of these countries: Australia, Canada, United Kingdom, USA.

Grow Your Own

You can specify which text fields in a grow Your Own record should appear in the summary that appears when you expand a contact in the contact list.

Import

You can import data into your Sumac database directly from a public website. For example, you can tell Sumac to look up your contacts' postal codes on a website and then retrieve information about the contacts' legislative representatives.

Payments

When a payment is processed and authorized, Sumac automatically clears the verification value (CVV2). This assists you in complying with PCI-DSS standards for payment data security.

Sumac now supports BluePay, a new payment processor. The other supported payment processors (IATS and Beanstream) are based in Canada, BluePay is in the USA. All of them can process transactions from anywhere, but our USA clients may find BluePay more convenient to deal with.

Sales

When you add a product to a sale, you are shown the current inventory status of the product.

Tasks (Volunteers)

There is a new button in the Tasks list that automatically creates time dockets based on information in tasks. This can save a lot of manual data entry time.

Ticketing

Sumac Ticketing can work online so people can order and pay for tickets for your events from your website. This supports both assigned seating (Sumac can present a picture of your venue) and general seating.

All relevant information (e.g. ticket availability, pricing) is taken from your Sumac database and presented on your website. Similarly, as tickets are ordered, the order details are entered directly into your Sumac database.

Seat block records have been enhanced. You can specify where seat blocks are in the theatre so that Sumac can draw a picture of the theatre on your website. You do this by clicking a schematic diagram of the theatre, so it is not onerous.

A change was made to the records that describe events: the time field for an event can be wider (formerly 10, now 40 characters).

Time Dockets

Time dockets now have an extra field that lets them hold disbursement amounts.

Tour Booking

The Programs list has a new Explore button. This button integrates information about grants (received and recorded using Fund Requests and Donations), expenditures (recorded against budgets in the Fund Requests), costs associated with workshops, and revenue received as a result of delivering the workshops.