Version 3.4 Release Notes

December 2, 2010

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Introduction

This document describes features which were added to release 3.3e of Sumac to create release 3.4.

General

You can specify a maximum font size for labels, which helps with line wrapping in unusual situations.

Donations

Online donations (via your website, directly into Sumac) are now available. This enables you to easily add a page to your website which lets people make donations to your organization. The data (a Donation record, a Payment record, and possibly a new Contact record) are all automatically saved into the Sumac database, saving you lots of data entry time. Because the payments are processed directly by your payment processor, there are no intermediaries and payment charges are lower.

The other significant enhancement to donations is that you can group them into batches. This enables you to note which donations are associated with which bank deposit or other grouping that makes sense to you. The totals of the donations in a batch are automatically calculated so you can match them with bank statements.

Grow Your Own

GYO records automatically record who changed the record and when.

You can now define two types of GYO records, and link information in one type of GYO record with information in records of the other type.

Pledges

A new field has been added to pledge records: pledge status. This allows you to identify pledges that are complete, written off, in progress, or whatever other statuses make sense for your organization.

Ticketing

You can enter discounts as currency amounts or percentages.

Surcharges can be marked as mandatory or optional for orders placed from within the office or from your website. Previously you had to make them either mandatory or optional in both situations.

This release also comes with a new version of the online components of Sumac Ticketing.

Tour Booking

The Explore window for analyzing programs and their funding has been significantly enhanced.

The Involved Contacts window has a Charge Fund Request button that charges amounts directly to fund request budgets.