Version 3.5.1 Release Notes

June 8, 2011

Contents

Introduction

This document describes features which were added to release 3.5 of Sumac to create release 3.5.1.

General Usability

There is now a purple colour scheme. You can see the other colour schemes by choosing the Colour Scheme command in the Utilities menu.

Contact Records

In the window for editing a contact, the History tab used to require you to click a button to Show all the related information in the database. Now it loads automatically. In addition, it presents a useful summary of donations from the contact.

In contact records, you can add extensions to the phone number for an assistant in the Business Address tab.

If you have defined an extra field which will hold a password, you can tell Sumac to make the password unreadable (obfuscated) when viewed in contact records.

Also, extra fields can be marked as sensitive, and therefore not viewable by all users. This enables sensitive client information to be hidden from users who should not be able to see such information.

Contact Search Builder

Search Builder allows you to find contacts based by searching in Sales records.

Donations (Online)

There are several enhancements relating to donations being applied to funds:

• There is a checkbox in the definition of a Fund, so that you can indicate if the fund should be presented in a list to patrons donating on your website. When Sumac receives donations online, it allows the donor to designate a fund, chosen from a list, the donation should be applied to.

• If you use funds to allocate portions of donations to different accounts, you can show the donation allocation as a column in the donations list window.

Grow Your Own (GYO)

There is a Set Values button to enable bulk editing in Grow-Your-Own list windows.

You can add an annotation to the link between two Grow-Your-Own objects at the time that the link is created. The annotation shows when the links are displayed in the GYO list windows.

Payment Security

The Payment List has a Clear button that can clear the credit card details from historical payment records, while still maintaining the details of the payment itself.

The Administrator menu has a Payment Transaction Log command that lets you view all transactions relating to payments: creation, processing, deletion, changing.

Pledges

You can now accept pledges from your website, directly into your Sumac database.

Reminders

In the Calendar view of Reminders, you can now search by action plan and user.

Tasks (Volunteers)

Tasks can be viewed in a calendar view in addition to being view as a list.

Ticketing

Seat blocks can be defined to have only odd or only even numbered seats.

You can mark seat blocks for old performances to be inactive, so they show up grey in the list, and sort to the end.

Time Dockets

There is a New Multi-Program button in the Time Dockets list. It enables you to enter time for several programs (one client and one worker) at once. It creates multiple time dockets, one for each program.

The Time Dockets list lets you search by client.