Version 3.5.4d Release Notes

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Introduction

This document describes features which were added to release 3.5.4b of Sumac to create release 3.5.4d. This release adds many user-requested enhancements in many areas.

It also starts a series of changes which will enhance the management of events.

Files

File paths are more independent of which server the files are stored on. This is particularly helpful in Windows environments, where server drive letters and folder names vary depending on network architecture and Windows release.

Campaigns

In the list of campaigns, you can display a column which automatically calculates the value of donations to each event. There are also totals in the status bar at the bottom of the campaign list window.

Communications

Search communications by event groups. See *Events* below.

Contacts – Donations

Soft credit donation information shows in the History tab of contact records.

Contacts – Payments

You can define multiple merchant accounts and relate them to contact segments. This enables Sumac to choose an appropriate merchant account based on the segment of the contact making the payment.

Donations

The Mail Merge command in the Donations list provides options for grouping several donations together to produce one output document.

- You can group by *receipt number*: this helps re-issue receipts by doing a mail merge.

- You can also group by *donor*: this enables you to produce statements of each donor's donations over the course of a particular time period.

There is a reconciliation report that reports on whichever batches you choose, showing subtotals for each batch and a grand total for all the batches in the report.

Email

The Analyze Email window has a Show Contacts button.

Events

Two new fields in event records allow you to specify revenue from sources other than donations.

There is now a button in the Sumac Console window for managing events. The ability to use this button is a specific capability given to a user in the user's record.

This button lets you manage events as you could before, but also provides these extra capabilities:

- You can choose which columns show in the events list.

- Events can automatically calculate the donations from the event and also calculate attendance at an event. These figures can be displayed as columns in the events list.

- You can define event groups. Events can be grouped any way you want: perhaps all the fundraising events in the last quarter, or all the performances of a particular theatrical presentation.
- If you have the Sumac Ticketing module, you can define packages – the events in a subscriptions series, and the rules that a user must follow in selecting specific events within the package.

Grow-Your-Own (GYO)

You can edit the notes that are on the relations between a parent and child GYO records. Just click the note in the GYO list window.

When you search for a list of GYO records which may have children, the loading is much faster. This will be especially noticeable over a slow network.

Import Workspace – CSV Files

The Import Workspace command is now able to directly open csv files, in addition to tab-delimited text files.

This file format is often produced by spreadsheet and database programs. Import Workspace used to be able to handle only tab-delimited files. This was slightly inconvenient but usually not a big problem, because you could open a csv file with a spreadsheet program, then save it as a tab-delimited file.

However, sometimes csv files were too large for a spreadsheet program to open and convert. Now you can just open the csv directly in Import Workspace. It can handle much larger data files than spreadsheets can handle.

Importing

There is a command in the Utilities menu for importing tagged data. This is data that is not arranged in columns but instead each row indicates which field (column) it belongs to.

Account codes can be imported when ticket orders are imported.

Labels

Avery 5159 and 5259 labels are now supported.

Memberships

The definition of a membership type can specify that when a user is defining a new membership record, the user should be able to choose the applicable tax rate.

Multiple Payment Processors

Sumac now enables you to simultaneously use more than one merchant account and payment processor. If your organization is a single entity, having just one merchant account works fine. However, some organizations segment their contact lists, and the segments actually define different component parts of the organization. In this situation, it may be desirable to specify a different merchant account for each segment of contacts, so that a payment from a particular contact will be processed using a particular merchant account, and funds can be segregated into bank accounts based on each payer's contact segment.

Sumac now support multiple payment processors, one per contact segment.

If you do not specify a payment processor for a particular contact segment, then Sumac uses the default payment processor specified in the Preferences dialog.

Reports – Donation Batches

There is a reconciliation report that reports on whichever batches you choose, showing subtotals for each batch and a grand total for all the batches in the report.

Security

If transaction logging is enabled, then log on and log off actions are logged in addition to transactions that affect payments.

Reminders

In the calendar view of reminders, you can create reminders and can also tell Sumac whether to show reminders or meetings or both.

Ticketing

See *Events* above. Events can now be grouped. You can also define packages – a single priced group of tickets chosen from several events. Note that this release does *not* integrate support for packages into the ticket buying process. That is coming soon.

Account codes can be imported when ticket orders are imported.

Tour Booking

The Mail Merge command in the Programs list provides the option of merging all workshops under all the selected programs so that they are all part of a single program.

The Mail Merge command in the Programs list lets you choose Venue as the primary contact (this was formerly limited to booker and billing contacts).

The Programs list window lets you show workshop start times as a column.

Web Integration

General

The online transaction server part of Sumac automatically reloads events every hour. This means that if a Sumac administrator changes the list of events, the changes will automatically show up on your website.

The online transaction server's window displays the most recent message that has received. This helps in both testing and production to confirm that message traffic is as expected.

Donations

There is a new release of online donations which provides for much more enhancement. This enables field-by-field control over what is mandatory and what displays. One consequence of these enhancements is that you can accept donations without the user needing a password.