Version 3.5 Release Notes

April 25, 2011

Contents

Introduction

This document describes features which were added to release 3.4b of Sumac to create release 3.5.

Major New Addition: Collection Management

Sumac now supports managing collections of objects. This is intended for use by museums or other organizations that manage collections of objects or archival documents.

Donations

When you use Search Builder to search for contacts who made donations matching specified criteria, the criteria now include the Fund as well as many other fields.

Sumac now allows you to specify that donations made to a particular fund are to be allocated among multiple accounting codes.

Email

The Analyze Email Addresses window now has an Export button that lets you export some or all of the data in the window.

Grow Your Own (GYO)

You can now do a mail merge operation using a template that can extract fields from both parent and child records. This uses the special LI syntax for merge formulas.

Macintosh

When doing a mail merge operation with an rtf document, some new rtf syntax being used by Microsoft Word on Macintosh computers is now supported.

Memberships

Search Builder now allows you to search for contacts who had a membership in effect any time within a specified range of dates.

Payment Security

To enhance security of payment information, Sumac includes the ability to log all transactions that affect payments.