Version 3.6.2 Release Notes

2012-07-17

Contents

Introduction

This document describes features which were added to release 3.6.1 of Sumac to create release 3.6.2.

General

When Sumac needs to get all the information about a contact, perhaps during a mail merge, or when you double click to look at the contact, it has to load several types of information from the database. The part of Sumac that does this is now about twice as fast, which will be quite noticeable if your database is accessed over the Internet.

The Analyze Email command now shows assistants' email addresses as well as all the residence, business, and vacation email addresses.

Auctions

Lots can have small pictures which can be included in a mail merge to generate a bid sheet with a picture.

Collection Management

There were many enhancements to Collection Management:

a. Thumbnails are 50% larger (120 pixels square instead of 80 pixels square).

b. The search panel can search by description fields.

c. A new field holds an alternate (common) name for an object.

d. Terminology change: "Aggregate" is now "Set/Group".

e. The Basic tab for a collection object now shows the donor (filled in from the most recent Provenance record).

f. The numeric tab shows Notes as a column.

g. Terminology change: "Non-numeric" attributes are now named "Curatorial Notes".

h. The order of the presentation of location information (building-room-row etc.) is consistent.

i. For all dated attributes, the Notes fields are at the bottom instead of the top.

j. Tabs in collection objects have been re-ordered and, in some cases, renamed.

k. The title bar for the window that edits a collection object shows the accession number as well as the object name and database ID.

l. Some issues with image management and thumbnails have been corrected.

m. The collection objects list window lets you search by location.

Contacts

The Preferences dialog lets you specify that the Membership Directory and Pictures tabs should not show in contact records.

Set Values button in the Contacts list lets you set the Donation Recognition field.

Course Registration

The session code shows in the Choose Session dialog and also in Search Builder searches for registrations.

Search Builder allows you to search for Sales that are not paid.

There is a new report which shows attendance at a single session. Note that it groups attendance statuses by their type, which is a new field in the attendance statuses.

The definition of a session supports considerable extra information. The definition of a Registration supports extra information.

Donations

The Email Receipts button can send receipts generated by Mail Merge as well as those generated by Make Receipts.

Donation amounts showing in the contact list have commas in them.

In the Donations list, labels are generated in the order the donations show on the screen. They used to be ordered by donor contact IDs.

Set Values button in the Donations list lets you set the Recognition Sent flag.

In donation records, you can now record receipt numbers that were generated by an external (i.e. not Sumac) system.

When you fill in an in-honour/in-memory contact in a donation, Sumac can automatically fill in the recognition-to contact. This depends on (a) the in-honour/in-memory contact being related to a recognition-to contact, and (b) a preference that tells Sumac which relation to use. This saves time and helps ensure that recognition letters will be sent appropriately.

When you fill in the donor, Sumac can automatically identify a Soft Credit contact related to that donor. For example, if a donation from a particular donor should always be soft credited to a particular board member, then you can relate the board member to the donor, so that Sumac will be able to automatically identify the soft credit contact.

__ syntax works in formulas in templates used in Make Receipts, so the same template can be used in both Make Receipts and Mail Merge.

Events

The Preferences dialog lets you specify names for the revenue fields in event records.

Fund Requests

The Fund Requests list lets you display the balance owing on a particular fund request.

Grow Your Own

Grow-your-own records now have a Duplicate Last button.

Membership

There is now a preference which tells Sumac that when a new membership record is created, it should automatically present a new Payment to be edited and saved into the database.

Payments

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Reminders

The Reminders list window has a button that lets you create many reminders at once based on repeating dates (e.g. same day each week, same date each month, consecutive weeks or days).

Ticketing

If you use Sumac Ticketing and allow people to buy tickets on your website, you now have an option to suppress the display of the number of unsold seats.