



## **Version 3.6.3 Release Notes**

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## **Introduction**

This document describes features which were added to release 3.6.2d of Sumac to create release 3.6.3.

## **Administration**

The button for adding a new User has the ability to duplicate the currently-selected user, making it easier and faster to create a new user with the same security settings as an existing one.

## **Contacts**

When you edit a contact and change a field in one of its addresses (residence, business, or vacation), Sumac checks to see if there are any related contacts and gives you the option of automatically updating the related contacts' addresses too.

## **Course Registration**

It continues to be a major enhancement project. This release adds support for extra items (e.g. materials, safety equipment) that are purchased at the time of registration for a course.

## **Donations**

The totals of donations in the status bar at the bottom of the Donations list window now produces separate totals for cancelled and not-cancelled donations.

You can put an account code in a campaign. When you are entering a donation and choose this campaign, the account code is automatically entered into the donation.

## **Grow Your Own (GYO)**

Sumac GYO records can now have more of some kinds of fields, and can also support an additional type of field. Here are the details:

- Text fields: you can now have 30 (formerly 20)
- Date fields: you can now have 55 (formerly 16)
- A new type of field can be used in GYO records: a schema. Schemas are a lot like lookup lists, except that they are multi-level or hierarchical: the values in the first level choice limit the values in the second level choice which, in turn, limit values in the third level choice. Schemas can have up to six levels of choices. You can have up to 30 of these multi-level schema fields in a GYO record.

## **Ledger**

The ledger was added in the previous release. It has now been integrated in with other modules in Sumac.

In the Preferences dialog you can tell Sumac to automatically create ledger entries for course registrations, donations, payments, and pledges (ticket orders coming soon).

In addition, the Ledger list window can produce a report that summarizes ledger entries by account.

## **Online Transactions (Web Integration)**

When a new patron is entered into the database, Sumac creates a contact record and fills in its address fields from data entered by the patron on the website. Sumac now has an option that tells it to put the address information for these new contacts into the Business address instead of the Residence address.

## **Payments**

Sometimes a patron wants to make a payment using the credit card details they used in their last payment. Payment records now have a Load button which loads the information from the most recent payment by the selected patron, saving you the need to find the transaction and copy it manually.

## **Tasks (Volunteers)**

The tasks window now has a Send Email button.

## **Ticketing (Box Office)**

The list of Ticket Orders has a Sold Tickets button. This button produces a list of tickets that were sold for a particular event, lets you mark which ones were actually used, and lets you export the list to a file.

The Events list (under the Event Groups area) has a report that summarizes sales of tickets in a particular event group.