



## **Version 3.6 Release Notes**

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## Introduction

This document describes features which were added to release 3.5.5 of Sumac to create release 3.6.

## General

This release continues to enhance searching in the list windows. Now the collection objects, memberships, ticket orders, and tasks windows have enhanced searching, along with the communication and donation lists.

## Collection Management

Several usability and database enhancements appear in this release.

The collection object list supports greatly enhanced searching allowing you to combine searches based on:

- collection
- object name
- object number
- the text in dated notes
- schema or access point
- owner
- donor

These are the main enhancements to the window for editing collection objects:

- the second collection object ID number is explicitly labelled
- the primary schema entry on a collection object's Basic tab shows the names of the levels in the classification schema being used
- there is an acquisition status drop-down menu in the Basic tab
- the Description and Notes fields are larger and scrollable
- the current location (from the Location attribute with the most recent date) is displayed on the Basic tab
- the field that used to be labelled *Owner ID* is now labelled *Owner*
- the Basic tab includes an area for describing an aggregate object: its aggregate type, number of component parts, and a text field that lets you list the components
- Physical attributes now include colour and technique in addition to material

## Communications

The Explore button in the communications list has been enhanced. Its Export button exports more information, and its Show Contacts button is able to show all or just the selected contacts.

## Contacts

In the Contacts list, the Set Values button supports setting (usually because you want to clear it) the Residence Recipient field.

The window for choosing a contact shows the listed contacts' cities and alerts. In addition, contacts with alerts show in red. You can also enter the last name of a contact to choose (as always) but then enter a comma and the first name. For example, if you enter *Smith*, you may get a large number of contacts, but if you enter *Smith,R* you will only see Smiths whose first name starts with *R*.

## Course Registration

There is now support for creating student transcripts. Use the Transcript command in the Reports menu in the contacts list; Sumac will do a mail merge for the selected contacts, for all their course registration information. You can use an LI formula to list all the courses and outcomes. Here is a fragment of a template that shows a student's name then the student's courses:

```
<<c_Name>>
```

```
<<LI {r_Course_Name;r_Session_Final_Status_Name;r_Session_Code;r_Session_Start_Date;r_Session_End_Date}>>
```

## Donations

The Donations List window allows you to search donations by soft credit person.

When entering a donation for whom there is a current pledge, Sumac asks if you want to link the donation to the pledge.

Exports from the Donations list allow you to export the Annual Receipt flag from the donors' contact records.

There is now an option to make the Donation Type field in Donation records an optional field (it is mandatory by default). This option can be chosen in the Preferences command in the Administrator menu.

When you do a Mail Merge operation on Donation records, you have the option of grouping them by the In Honour field. A template can then use an LI formula to include information about each donation in honour of the particular person. Here is a fragment from a template that includes the amount and donor from each donation, followed by the total value of all the donations:

```
<<LI {d_Total_Amount;d_Contact_Name}>>
```

```
total: <<__d_Total_Amount>>
```

## Email

The window that shows progress during the transmission of a batch of emails now has a button which opens the status report. When you click the button, Sumac opens the status report and shows it in an Import Workspace window.

When you use Sumac to *receive* email, the window showing the incoming emails shows the contact based on the email's sender. Now there is a new column that shows the contact based on email addresses that were found in the body of the email itself. This is useful if the email address of the sender is not actually the email address of a contact in your database, perhaps because you sent an email to a different address, and it was forwarded.

## Events

In many places in Sumac, when you are asked to choose an event, you will see a new dialog that lets you pick an event using many different criteria.

You can specify that tickets for an event should be accounted for under a specific account number.

## Grow Your Own (GYO)

Count fields in GYO records can be shown as durations (in addition to be displayed as simple numerical counts or times of the day). Durations are displayed as a number of hours and minutes: 1.5 hours would show as 1:30. They are stored as a number of seconds: 1.5 hours would be stored as the number 5400.

In a window that lists GYO records, when you click to sort by a particular column, Sumac does a secondary sort by the previous column that was sorted, thereby providing for a two-level sort.

GYO records can now link to a related Donation record.

The fields in GYO records can be divided among different panes. This enables you to present a more organized dialog for GYO records that have large numbers of fields. To use this feature, you need to specify the name of a

pane to hold each of the fields in the GYO records. You also need to activate this feature using a checkbox on the Grow-Your-Own tab of the Preferences dialog in the Administrator menu.

## **Import Workspace**

The Import Workspace button for assigning ID numbers to rows allows you to select some columns and create unique ID numbers for rows that have unique values in the selected columns.

## **Membership**

The Membership list provides more powerful searching. It also now provides the ability to search for memberships that were paid in a range of dates.

## **Online Transaction Server**

If you use Sumac to serve transactions from your website, you can now provide information to enable Sumac to automatically log on and start the transaction server. Use the Configure Default Log-on command in the Utilities menu on the computer that runs Sumac to serve transactions to the website.

## **Payments**

Sumac now supports a new key management mechanism which enables you to define encryption keys for protection of payment information. See *Security* below.

Two new payment processors – Chosen Payments and Elavon – are now supported.

## **Pledges**

When you use the Make Payment button to process pledges, you now have the option of specifying a payment date for the donation and payment records that are created. Sumac formerly defaulted to the current date.

When editing a pledge, the status bar at the bottom of the window now shows the date when the pledge was entered, and who entered it.

## **Reminders**

In the calendar view of reminders, if you click to create a New reminder, Sumac assigns the new reminder to the user whose reminders were being viewed in the calendar.

## **Reports**

A new report shows summary results for several campaigns.

The course attendance report shows numbers of hours (based on class start and end times) as well as numbers of classes.

## **Sales**

The Sales list window allows you to show a column that contains product quantities.

## **Search Builder**

Search Builder boxes allow you to put a Title on the box. So you can label the boxes in a large search.

## **Security**

In order to ensure better security of your database, any user who is given administrative privileges must have a high quality password. High quality passwords were formerly required only for users who could view payment information.

When Sumac saves credit card payment details into its database, it encrypts the information for extra protection. We have added a feature that allows you to make this encryption much more secure by defining your own encryption keys. This is described in the Sumac *Security and Risk Management* manual.

## **Tasks and Volunteers**

The Tasks list supports more powerful searching, including the ability to search on assignment status fields.

## **Ticketing**

The dialog for printing tickets supports a new form layout: 1 x 3 ticket stock.

The Ticket Orders list window:

- allows you to show a column that contains a summary of the actual tickets in an order
- provides new and more powerful searching
- allows you to show a column that contains the discount total
- has a button for sending an email confirmation to a ticket buyer.

You can credit back a payment. The way this works is that when you double click to edit a ticket order, if you click to select a payment record then click New, the newly created payment record has the same details as the one that was selected. The amount field in the new record will be the same as in the selected one, and you can put a minus sign in front of it to indicate a credit, and perhaps change the amount if only part of the payment is supposed to be credited back.

A new web-based module offers considerable enhancements in how ticketing works on your website:

- group events into productions
- group productions into a higher level grouping (e.g. seasons)
- show an html document containing extra information (pictures, text, links, etc.) about a production at the time the patron is choosing which event may be of interest
- a more elegant button bar

## **Tour Booking**

The Involved Contacts list can show a Funder column: it displays the first funder in the program associated with the involved contact.

## **Users**

Sumac now requires a strong password for administrative users as well as for users who can see payments.