Version 4.1 Release Notes

2013-07-12

Contents

Introduction

This document describes features which were added to release 4.0 of Sumac to create release 4.1.

General – User Interface

When you click to sort a column that contains lookup list entries, the status bar at the bottom of the window shows the number of distinct entries that are in the column.

The forms list, template usage list, and rating algorithms list have the new Sumac user interface.

List windows remember where the splitter was and how tall rows were, so the next time you open the list window it looks the same.

Accounts codes that have been marked as inactive no longer appear in the many places where you are able to specify an account code.

General – Database

A new Backup Entire Database command saves the entire database into a single file. Note that this command is not available if you are using Sumac Online (which is already backed up daily).

Obfuscated passwords are now the default for all new databases. This feature enhances security. It used to be optional.

General – Searching

In two list windows (Grow-Your-Own, and Submissions/Auditions) you can save and reload search criteria. Over the next few releases, we will add this to all list windows. When you save the search criteria, Sumac saves:

- the search criteria
- the set of columns that are currently showing
- the sort order of the columns that are currently showing

Later, when you load the search criteria, Sumac resets the columns being displayed, sets the search criteria, performs the search, and sorts the records as they were before. The result is that you can save a "report", since a report usually consists of the things being saved: search criteria, column selections, and sort order.

Campaigns

A new report shows a break-down of donations to selected campaigns.

Collection Management

A provenance entry can link to a creator contact.

Communications

There is a new report that shows the number and types of communications by user.

There is a new report that shows communications for the current user in a date range.

The Bulk Edit command lets you change the notes field in the communications being edited.

The communications list has buttons for Mail Merge and Labels/Envelopes.

Contacts

When entering facts that indicate contact availability, you can specify the days of the week by clicking each day and Sumac creates the necessary individual facts, one for each day.

If you show donation information (e.g. largest, most recent) as columns in the contacts list, Sumac calculates these numbers about 100 times faster.

The History tab has an Add To Contact button that lets you add records to the history even while editing the contact record.

When you are approaching the limit of the number of contacts allowed in your database, Sumac warns you that the limit is near.

The Resolve Duplicates command has been split into two: Resolve Duplicates (which merges two contacts together), and Find Duplicates (which finds likely duplicates).

The Fund Duplicates window is completely re-written to be much more useful and also more easily used.

Assistants' phone numbers are formatted automatically.

The contacts list supports new-style searching, so you can specify multiple search criteria combined with *and* and *or*.

When you create a new contact, Sumac remembers the residence-business radio buttons and sets them the same as the last time you created a new contact.

When you create a new relation, Sumac remembers the relation type you last specified.

Course Registrations

If a student withdraws from a course, you can specify a reason why.

Withdrawals and other types of course changes appear in the history tab in a contact's record.

A new mail-merge field shows the total amount paid, so you can send emails that indicate an amount outstanding.

The Course Registration module now support "streams" – a course of study. These work by specifying that a particular course is a stream. Then, when you define a session associated with the course, you can specify which other sessions are part of the stream.

Donations

Donations automatically track when the donation was entered into the database.

There is now a new group of fields in donation records which are used to manage matching gifts.

You can define a relationship between a donor and another donor who will match the first donor's gifts. Sumac can automatically fill in the matching gift donor, based on the donor.

You can search for donations by contact segment.

Cancelled donations are no longer ledgerized.

When linking a donation to a pledge, there are more columns of information displayed about the donor's pledges, making it easier to decide which pledge to choose.

In the donations list, you can search donations by amount.

The report to show donations by donation type lets you choose which donation types you want in the report.

When a soft credited donation is fulfilling a pledge, the amount is credited to the pledges receivable account instead of having a negative amount debited to that same account.

A new report in the donations list lets you show donations to an event, grouped by donation type.

Two changes make donations to households more convenient:

- The donations list has a Donor Roll report which can group donations by household.

- • There is a preference which causes Sumac to warn uses when they are entering a donation from a household member. This helps enforce a policy that donations should normally be recorded against the household instead of against individual household members.

Email

When sending bulk email, you now have the option of sending to only business addresses, only residence addresses, or both. Some of our clients have arrangements with corporate sponsors that specify when and how they are allowed to solicit the company's employees at work, but they need to be able to solicit those employees who donate and provide personal emails too.

Fund Requests

Fund requests now show when you expand the funder in the contacts list.

A fund request can now have up to six report due dates (formerly just one). There is a button in a fund request to create reminders based on the report due dates.

Grow-Your-Own (GYO)

When a GYO record is double-clicked, if one of the contacts has an alert in its contact record, Sumac will show the alert. Note that you need to use the Preferences window to tell Sumac to do this.

You can search for GYO records by a specific contact, in addition to searching by a contact name.

Entries in GYO lookup lists can be marked inactive so they do not appear as possible choices in drop-down menus.

When a GYO record is presented with tabs, if a tab has data on it, the name of the tab is preceded by an asterisk.

You can show a contact's birth date as a column in the GYO list window.

You can now have up to four (formerly two) long text fields in GYO records.

GYO records support 10 additional schema fields and 10 additional date fields.

Importing

In the Import window, when you save and restore column selections, the fixed values in the left-hand scrolling list are also saved and restored.

Labels

Avery 5027 labels (file tab labels) are supported in the Labels/Envelopes window.

Mail Merge

The window that lets you specify whether you want one or multiple output files also lets you identify the single output file or the folder to hold multiple output files. This reduces the number of questions you are asked when doing a mail merge.

Memberships

Mail merge operations on membership records provide a field that generates the billing contact's mailing address.

Sumac now supports signing up for a membership on your website.

For membership renewal, you can specify optional extra payments associated with a membership.

Memberships have a checkbox that indicates the membership is a gift. Typically this means that the billing contact is making a gift to the member contact.

Payments

Sumac now integrates with Chase Paymentech.

Payment records that are being used to transfer funds directly from payers' bank accounts can be converted to a batch file for automated processing by a bank. The only bank currently supported is CIBC (Canadian Imperial Bank of Commerce) but now that this is supported, more can be added easily.

The Bulk Edit feature is available for payments.

Pledges

Pledges support fields for an in-honour/in-memory contact.

The donation fields in a pledge are re-ordered to correspond to the order they appear in donation records.

Bulk Edit is now available in the pledges list.

You can search for pledges to a campaign, and also to a campaign and all its children campaigns.

You can search for pledges by account code and donation type.

Reminders

When you are viewing reminders in a calendar view and click the List View button, the reminders that show in the list window are the same as the ones that were showing in the calendar view.

Sales

The list of Products has been moved out of the Lookup Lists window and is a separate button in the Sumac console window. Amongst other things, there is now a Mail Merge button in the Products list.

Products have SKUs. When ordering products, you can find them by SKU.

Sales transactions can now be added to the Ledger automatically. Sales of a single product can be split to multiple ledger accounts.

Search Builder

You can search for additional types of facts: employment facts, preferred task facts, and qualification facts.

You can aggregate donations by household when searching for donors who donated in a certain range.

Tasks and Volunteers

When you create multiple tasks, you have the option of using a template.

The Send Bulk Email button lets you send emails to people selected in the Workers list as well as sending to the people identified in tasks.

Ticketing

You can now mark delivery methods to indicate that they should not be presented on your website.

Website Integration

Sumac now supports signing up for a membership on your website.

When a person makes a pledge, a donation, or buys tickets, there is room for the person to add a comment to the transaction. This allows a person to indicate how they found out about your organization, that a donation is in honour of someone, who they are coming with, etc.