Version 4.2.1 Release Notes

2013-10-02

Contents

Introduction

This document describes features which were added to release 4.2 of Sumac to create release 4.2.1.

General – User Interface

This version of Sumac makes you choose a language (English or French) and acts appropriately. Very little has been translated to French so far, but we are working with members of the Sumac community to make this happen. If you want to help, you can get a significant discount on your Sumac license fee.

Campaigns

The campaign list window has a new report: donations in a date range grouped by campaign.

Collection Management

Provenance records have two additional fields: Creator Location and Creator Style/School.

All four types of dated records support a standard fixed date (in addition to supporting approximate historical dates).

You can show the most recent insurance value as a column in the collection objects list window.

You can show the most recent location as a column in the collection objects list window.

The Basic tab of a collection objects has these additional fields: gender, subject, title, pattern/model.

Contacts

The Basic tab in contact records has a marital status drop-down menu. The Lookup Lists dialog has a corresponding lookup list.

The Undo button is back in the Contact list window's searching area.

There is a mail merge code for preferred recipient.

In the contact record History tab, all donation amounts show both the Total and the Receiptable amounts

Course Registrations

Registrations have a new field: number of students. This can be used if a course is typically taught to couples or families.

You can mark a course as Inactive so new new sessions are added to it.

The Registrations/Attendance by Session report shows teachers and class times.

When doing mail merge for course registrations there is a new variable which generates a list of all the dates and times of all classes.

Fund Requests

Fund requests now have a Solicitor field, which links the fund request to a contact.

Grow-Your-Own (GYO)

GYO records can now have up to 16 (formerly 4) long text fields.

When defining GYO text fields that are entered as checkbox groups: you have more control over the appearance of the window for entering and editing these fields. You can specify how many checkboxes per row, and also to hide the text field itself.

Invoices

Sumac now supports invoices. These can track payments expected or received and are integrated with memberships, course registrations, and pledges (and, of course, payments).

Labels

The Labels dialog allows you to save and re-use custom settings.

Ticketing

The ticket orders list allows you to search by Package.

Ticket orders allow you to choose seats in a subscription for events which occurred in the past. This lets you record historical data.

Ticket orders entered online are now automatically marked as Paid.