Version 4.2.12 Release Notes

2014-12-17

Contents

Introduction

This document describes features which were added to release 4.2.11 of Sumac to create release 4.2.12.

Campaigns

The Campaign Type field is now mandatory in campaigns. It shows a help bubble that explains what it is for.

Communications

You can mark communication types as inactive. Inactive communication types do not appear in drop-down menus, and the group of Communication Preference checkboxes in contact records shows them disabled (grey).

Contacts

When you click Households in the Contacts List, you have the option of creating a household from the currently selected contacts.

Sumac can now integrate with Mail Chimp, sending lists of contacts to it. This is the fourth way of doing bulk email with Sumac: Sumac can do bulk email itself, you can use ConstantContact, and you can use CQRC Engage.

The Team Member report has been enhanced to show the earliest membership date for each team member.

Search Builder has been enhanced to enable you to search in invoices, communication notes, pledges effective in a date range, grant applications, and tour booking programs.

Course Registration

The window for choosing a session has a Reload button, so if your colleagues have been adding courses and sessions, you can see them without having to restart Sumac.

The window for choosing a session shows the session code.

The window for editing a registration has a link button for showing the student's contact record.

When you ledgerize a course registration, products are ledgerized to the product's account rather than to the generic course registration account.

Course registration records automatically record the user who created them and when.

Donations

The Donation Batch list window shows Notes as a column.

There is a new preference telling Sumac that when a donation is entered it should only create a payment record if the payment type is a credit card.

Grow-Your-Own (Custom Add-Ons, GYO)

When you search for GYO records, you can search for the user who entered the record and also the date when the record was entered.

Importing

You can now import course types, seasons, adjustment reasons, discounts, fund request statuses, fiscal years, and states (provinces).

Import Workspace

The import workspace can now validate Pledge Statuses.

There is a new button for comparing the values in two columns and highlighting the rows that are different.

There is a new button for clearing the values in a column.

The *map* command in a script can now replace a single column with several columns.

Invoices

There is now a Details report that shows the details of an invoice, itemizing its charges, payments, and the balance.

Payments listed in an invoice show the payer, cheque number, and cheque date.

Memberships created in an invoice now do a search to find the prior membership end date and, if there is one, suggest it as the new membership start date.

If you do not use the Invoice Number field in invoices, there is a database-wide preference to hide it.

The payment type flows through to pledges and memberships from a payment in an invoice.

Memberships

When you create an invoice from a membership, the membership is added as a charge in the invoice, and not double-counted.

There is a new Membership Retention report.

You can specify the duration (in months) of a particular type of membership.

If you integrate your Sumac database with your website, a new Membership2 module provides a greatly enhanced user interface for creating and renewing memberships.

Offices

In previous releases, office records are identified in drop-down menus using their street address. This becomes a problem when there are multiple office records at the same street address. So now there is a field for giving the office a name to appear in drop-down menus. If this name is not specified, Sumac will use the street address as it did before.

Payments

The account drop-down menu in payment windows shows only credit accounts instead of all accounts.

Payments showing in the payment batch list show their campaign, cheque number and cheque date.

The cheque date and number from a payment record flow through to donations added to an invoice with that payment.

Payment records have a link button that shows the invoice that holds the payment record.

Payments showing in a payment batch window show the ID of the invoice they are attached to.

In the payment batch window, when an invoice is being created, Sumac checks to see if there is an outstanding invoice with a zero balance that it should apply the payment to.

The payment batch details report merges two ore more payments with the same cheque number, date, and payer.

Pledges

The Load button for loading a contact's last payment details now works in the window for defining a pledge.

The window for choosing a pledge (e.g. to connect a donation to it) now shows the pledge notes.

You can link a donation to a pledge by dragging and dropping the donation onto the pledge.

You can drag pledges into a contact list builder window.

Reminders

When you print a Reminder, the entire note field is displayed.

When you print a Reminder, the action steps show indented in a hierarchical action plan.

The Bulk Edit command can now set the User Name for many reminders at once.

Ticketing

There is a new data element for displaying and mail merging ticket orders. The new field shows the list of events in the ticket order and the *number* of tickets (but not the details of each ticket) ordered for that event.

Database searches that show a large number of ticket orders, now operate hundreds of times faster.

Time Dockets

There is a new field in time dockets to hold the number of workers. This is helpful if the worker is a group (e.g. the *23rd Scout Troop*), and you want to record the number of people in that group.

Tour Booking

Workshops can have an End Date.

In the *programs* list, you can now find programs based on contacts in *workshops* being in a specific contact group.

Website Integration

*** All these changes require an update to your Sumac website components ***

If you have a large number of funds, donors on your website can enter keywords to shorten the list of funds to choose from.

You can make fund mandatory for online donations.

The field names on online Forms can be much longer, to provide explanatory information for filling out the form. In addition, you can provide a URL for further explanation about each field.

Forms that have text fields entered as multiple checkboxes are now supported on the web.

A new Membership2 module provides a greatly enhanced user interface for creating and renewing memberships.