Version 4.2.13 Release Notes

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Introduction

This document describes features which were added to release 4.2.12 of Sumac to create release 4.2.13.

General

The Preferences window is scrollable.

You can log the deletion of donations, course registrations, and sales.

The names of template files stored in the database are preserved rather than being converted to a long random unique identifier.

The automatic re-establishment of a lost database connection works under more circumstances.

The Make Template command has been renamed to Mail Merge Codes to more accurately reflect what it does.

Export buttons add a line of totals to the end of their output files.

The task types lookup list now allows task types to have a parent so they can be grouped. Preferred tasks facts in contact records support these enhanced task types as do task records.

Another big chunk of Sumac's user interface has been translated into French, courtesy of *Council for the Arts Ottawa*.

HTML reports can be exported and printed.

Auctions

Auction attendee records can record a table number, so you can see who sat with whom.

Awarding Grants

The grant applications window lets you send bulk email to reviewers.

Grant application types can specify standard reviewers which are automatically put into grant applications.

You can search for grant applications by their application status.

You can link a grant application to a reminder, using the Reminders button in the grant applications list window.

Communications

You can show the contact's organization as a column in the list of communications.

Contacts

Relation types can be made sensitive so that only users with the ability to see sensitive information are allowed to see this type of relation.

The Relations tab in a contact window shows additional information, organized into columns.

The History tab in a contact window lets you specify which types of history records you want to see. This uses a drop-down menu the same as the drop-down menu in Expansion area of the contacts list window.

The picture in the Summary tab of a contact record is the picture that is on the Picture tab (if there is one).

If you double click to edit a contact that is being edited by another user, you have the option of viewing the other contact in a read-only mode.

When a contact is marked as Deceased or Moved, you have the option of clearing communication preferences and volunteer types.

Bulk edit of multi-checkbox extra fields allows setting and clearing of individual checkboxes.

The window for printing labels has a checkbox to tell Sumac to print in landscape mode.

LI formulas work when doing a mail merge from the contacts list window. The listed sub-records are communications associated with the contact. They are listed in reverse chronological order.

When you use the Receive Email command in the contacts list window, if you create communications then Sumac puts the body of the incoming email into the Notes field of the communication record.

Course Registration

You can search Registrations by product.

You can link a registration to a reminder, using the Reminders button in the registrations list window.

The registrant in a course registration record can be changed after the record is entered.

A course registration can link to two contacts: a registrant (as before) and a billing contact.

A new report shows all supplementary items purchased by registrations in a date range.

A new report shows sales of products from either course registrations or sales, in a time period.

The window for editing a single course registration is scrollable, so it works better on small displays.

A powerful new Attendance Student Statistics report has been added to the registrations list window.

Donations

The splitting of a donation among several funds is handled more simply, with a button in the donation editing window.

Donation receipt numbers can be assigned in a different sequence within each contact segment. This accommodates the situation where your database is being used by several related organizations, each of which uses its own receipt number sequence.

The donation list dialog can search for donations by the donor recognition field.

Fund Requests

Fund request records can record three solicitors (formerly one) and two partners.

The Fund request editing window is scrollable.

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

GYO records can have 44 count fields (formerly 34) and up to 31 long text fields (formerly 16).

Fields in GYO records can have visibility formulas. These cause fields to appear and disappear based on values entered in other fields. Note that this feature currently works within Sumac but not on forms entered on your website.

GYO records can be connected to one or more reminders.

Contact email addresses can be displayed as a column in GYO list windows.

Bulk Edit of multi-checkbox text fields allows setting and clearing of individual checkboxes.

Importing

Importing of donations goes about twice as fast.

Grant applications can be imported.

Import Workspace sorting ignores accents on characters to sort accented and un-accented characters together.

Invoices

Invoices can be linked to an event.

The window for editing one invoice has link buttons to show the contacts associated with the invoice.

As you are entering payments and charges in an invoice, when they are equal, Sumac sets the When Paid date for the invoice.

Memberships

The window for editing a membership record has link buttons to show the contacts associated with the membership.

Membership records display in the history tabs of both the member and the billing contacts.

There is a preference to automatically set the Renewal field in a contact record based on the expiry date of a new membership.

When you import membership records, you can specify their ID numbers.

Payments

If a payment is part of an invoice, then the window for editing a payment has a button to show the invoice.

A new payment processor, Optimal Payments, is now supported.

There is now a Refund button in the payments list dialog.

Payment Batches

There is now a preference to show or hide payment batches. Note that it defaults to hide payment batches, so if you use payment batches, when you start using this release of Sumac you need to choose the preference to indicate that the payment batches should be visible.

Payment batches can have a payment purpose. If it is specified, then payments created in that batch have that payment purpose.

The payment batch window lets you list payments under a batch either in the order they were added to the batch or sorted by the name of the payer.

Additional columns can be displayed in the payment batch list window: the number of cheques in the batch, the number cash transactions in the batch, and the number of other types of transactions in the batch.

Payments displayed under a payment batch are made more legible with bullets grouping different types of information about the payment.

Payments displayed under a payment batch show the payment ID, the payer's contact ID, and the invoice ID.

Reports are enhanced and additional ones added:

- Details: shows details of the batch by payment type and lists product inventory in the batch.
- Invoices: summarizes what is in the invoices for all payments in the batch
- Payments: summarizes payments in a batch.

Pledges

When choosing a pledge (e.g. to link a donation to it), the window for choosing the pledge shows additional columns of information (amount paid, balance owing) about the outstanding pledges.

The contacts list window lets you show a new field which calculates the amount by which a pledge is in arrears.

When editing a pledge, the account is automatically set from the event, donation type, fund, and campaign, the same as donations.

Products

A new report shows sales of products from either course registrations or sales, in a time period.

Reminders

You can specify a completion status for a reminder. These statuses are specified in a new lookup list.

The Notes field in a reminder can hold 510 characters (increased from 255).

GYO records can be connected to one or more reminders.

The calendar view of reminders has a New Multiple button.

Reminders print with your user-specified column widths instead of standard fixed column widths.

You can define a Notifier that sends you an email when someone adds a reminder to the database.

Sales

When you enter a sale as part of an invoice, you are *not* prompted to set the Order Paid checkbox.

A new report shows sales of products from either course registrations or sales, in a time period.

Security

Sumac automatically logs the changing of a user record.

Sumac has preferences for logging the deletion of Contacts, Communications, Donations, Course Registrations, and Sales.

Ticketing

When you enter a ticket order as part of an invoice, you are *not* prompted to set the Order Paid checkbox.

You can specify that a discount coupon should only apply to full-price tickets, i.e. not to ones that are already at a discounted price.

You can create a notifier that sends an email when a ticket order is created.

Tour Booking

You can link a program to a reminder, using the Reminders button in the programs list window.

The Bulk Edit command is available in the programs list window.

Notes in tour booking workshops can be 510 characters long (formerly 255).

Volunteers (Tasks)

The task types lookup list now allows task types to have a parent so they can be grouped. Preferred tasks facts in contact records support these enhanced task types as do task records.

A task can be linked to a grow-your-own (GYO, custom add-on) record. Note that several tasks can connect to the same GYO record so if, for example, your GYO records are case records, several tasks can be linked to a single case record. The Tasks tab in the Preferences dialog is used to tell Sumac what type of GYO records can be connected to tasks.

Website Integration

The donation2 package allows the entry of a free-form notes field and a recognition field (e.g. *anonymous*).

The form for entering a new contact on a website allows entry of a prefix (e.g. Mr., Ms.) and a contact source code.

You can specify the ordering that should be used for presenting donation funds on your website.