Version 4.2.18 Release Notes

2015-10-30

Contents

Introduction

This document describes features which were added to release 4.2.17 of Sumac to create release 4.2.18.

General

Sumac now supports postal codes in Brazil.

Much more of Sumac has been translated into French.

The appearance of help buttons has changed a bit to make them more noticeable.

You can restrict office records by contact segment, so a user will only be able to use the office records for offices in segments he or she is allowed to see.

Accounting

The integration between Sumac and QuickBooks now works with QuickBooks Desktop on Windows.

Campaigns

A new report, in the Campaign list window, shows amounts pledged to campaigns.

Collection Management

The Field Preferences command can now rename and hide several fields on the Basic tab of a Collection Object.

Curatorial Notes in collection objects now support HTML tagged text.

Communications

Notifiers can notify people about the creation of new communications (of a certain type).

Contacts

The list of buttons in: the Add To Contact window is customizable.

A new report shows all relations between selected contacts in the Contacts List.

Contact Types can be made segment-specific so they are present but disabled in the contact dialog if a user is not allowed to see the relevant segment.

The Delete button in the contacts list window now runs about 100 times faster.

Course Registration

There is now a preference to *not* show the Payment Status window when a new registration is entered.

There are many ways to automatically discount course registrations: by contact type, family registration, other registrations, memberships. This works both online and within Sumac.

A preference checkbox indicates whether a student should be added to the wait list if a course is full.

In Course Registration/Registration View, the Registration Counts report can now show sessions in any user-specified date range instead of just upcoming session.

The Inventory of products being sold is no longer maintained using a number field in the product records, and the preference for doing this has been eliminated. Instead, inventory (quantity on hand) is being maintained by Product Inventory records that can record incoming product (e.g. the receiving people on a shipping dock), and also outgoing product (e.g. because it is sold in a Sale or a Course Registration).

Donations

The Group search in the Donations List window allows you to search by any contact field in a donation record, rather than just being restricted to searching for the donor.

A new report shows total amounts (pledge and donation) for a campaign and all its children.

A new fund report, shows the totals of donations to each fund in a time period. The Fund Summary report now shows both receiptable and total amounts, and also allows you to choose the Funds of interest.

The Fund Detail report has been converted from a printer format to an HTML report, available in the Donations List window.

The donation dashboard lets you show things by fiscal year as well as by calendar year.

When searching for donations using their external tax receipt numbers, you now have a relation drop-down menu so you can search for *starts with*, *contains*, *less than*, etc.

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

Field formulas can now give values to schema fields in lookup lists.

GYO list windows can now show contacts' preferred province/state.

GYO list windows now support Merge Duplicates.

Job Search

Notifiers can notify people about the creation of a new Job Opening.

Membership

Bulk Edit can change the Renewal Complete flag in memberships.

Payments

There is a new Payments By Account report.

Pledges

A new report that shows total amounts (pledge and donation) for a campaign and all its children.

The processing of pledges is: greatly enhanced. This command now shows a separate window with the status of each pledge, and can automatically process the payments that were created.

You can drag pledges into a List Builder window to add the pledge donor to a manually-constructed list of contacts.

Sales

The Inventory of products being sold is no longer maintained using a number field in the product records, and the preference for doing this has been eliminated. Instead, inventory (quantity on hand) is being maintained by Product Inventory records that can record incoming product (e.g. the receiving people on a shipping dock), and also outgoing product (e.g. because it is sold in a Sale or a Course Registration).

The Sales List window has a Print Receipt button which automatically mail merges (to generate a receipt) and sends it to the printer. This helps in a POS situation where rapid printing of receipts is important.

In a Sale, when selecting a product, you can search by SKU (as before) and also by product name (new).

You can now edit the *When Entered* date in a Sale.

Ticketing

You can now edit the *When Entered* date in a Ticket Order.

Time Dockets

The Time Docket list window has a General Control for more powerful searching.

Volunteers (Tasks)

When user entering a task clicks to create a Grow-Your-Own (GYO) record, Sumac automatically sets date and contact fields in the GYO record that have the same name as date and contact fields in the task.

There are now three reports in the tasks list window, showing Assigned Workers, Tasks in Date Range, and Volunteers by Type.

Volunteers (Tasks) – On Website

Sumac supports a powerful online volunteer management function. These enhancements were added to it since the last release:

• An organization can now see a list of its tasks that have an assigned worker but are not yet marked complete.

• When a search is performed to see tasks, the results list shows only tasks from vetted organizations.

• An Organization can now create tasks through the website, as well as assign them.

• In the Organization area, there is a Send Email button to send an email to a potential worker.

• In the Worker area, the list of tasks a worker has been invited to perform has an Accept button that sends an email to the Organization, and assign the worker to the task.

• In the Worker area, the list of tasks invited has a Decline button that sends an email to the Organization, and updates the Worker-Task Assignment for the worker and task.

• When searching by required skills the list of search terms chosen is more clearly marked with a check box.

• The window for editing a Worker-Task Assignment in Sumac has a button for choosing a tasks.

• Worker-Task Assignment records have an additional relation types: Declined by Worker.

• The email that gets sent to a potential worker is generated by a template.

• The email that gets sent to an organization is generated by a template.

Website Integration

Course registrations done on a website get added to the wait list if a course is full.

There is an optional single line in the payment page where a user can donate any amount.

Address entry supports an organization name, and lets the user specify that an address is a business or residence address.

Address entry supports an optional checkbox to select annual receipts for donations.

Address entry can require the user to enter their current password.

The ticketing package has its appearance updated to reflect enhancements in other packages.

Sumac now supports a sixth *userdata* parameter: a campaign ID that is put into online donations and pledges.

You can require a donation entered from the website to have either a Fund or a note specified by the donor.