Version 4.2.19 Release Notes

2015-12-03

Contents

Introduction

This document describes features which were added to release 4.2.18 of Sumac to create release 4.2.19.

General

Mail Merge functionality has been enhanced in these lists: reminders, memberships, donations, communications. The change entails a new window for setting up the mail merge operation: input options, choosing templates, etc. Let us know how you like this change; over the next few releases, we will be improving it and putting it into all Mail Merge commands.

Campaigns

A couple of changes make the campaigns list easier to use:

- An attempt to perform a Mail Merge on a campaign that is not appropriate (not finalizes or not a package) causes an error message to explain the problem.
- The progress bar is displayed when finalizing a campaign.

Collection Management

The Utilities/Customize Database/Field Preferences feature of Sumac has been extended to collection objects. You can hide and rename some of the fields in the Basic tab.

A new mechanism – categories – is now supported for curatorial notes. Each curatorial note can be specified as being in several categories.

A new column can be displayed in the collection objects list window. It shows a summary of a collection object in a format commonly used for works of art (artist, title, year created, medium, dimensions).

When choosing a schema entry, there is now a New button that lets the user add to the schema immediately. This is convenient when you are entering an access point and discover that the desired entry is not already in your schema.

Communications

The definition of communication types allows you to specify if the communication type should be displayed in the communication preferences (in a contact record) and also to specify if the communication type should be displayed in a communication record.

Contacts

You can specify a colour for each contact. The colours must be named using Utilities/Customize Database/Preferences before you can choose a colour for a contact.

In the Relations tab in a contact dialog, the contact name is a clickable link. The Show Contact button has been removed.

The definition of communication types allows you to specify if the communication type should be displayed in the communication preferences (in a contact record) and also to specify if the communication type should be displayed in a communication record.

You can now define an extra field in a contact record to be used for a sequentially assigned ID number. When the field is displayed in the window for editing a single contact, this type of field has an Assign button beside it. Click Assign to have Sumac enter the next number for this field.

Course Registration

The Course View now has a Send Email button that can send email to registered students and teachers in the registrations and also to wait list students.

The household member course registration discount is applied slightly differently. It is now available if a household member has registered in *any* course, not just the same course as a new registrant.

Disbursements

Sumac now supports a new listof records: Disbursements. You need to change the user profile of any user that should be allowed to work with disbursements.

Disbursements appear in their own list in the Financial grouping in the console window. They also appear in contact history and expansion, can be added using Add To Contact, and can be dragged into a List Builder window.

Donations

The Soft Credit reports have been converted to HTML and moved from the Reports button into the Donations list window.

Sumac locks the Make Receipts process so that only one user can do this at a time.

When importing donations, you can specify funds by fund code, as well as by fund name.

Forms

When you are editing the definition of a form, there is now a Preview button that shows a working version of the form that you can view and test.

Sumac now records the Changed Date of a form that has been updated by a website user.

Funder Requests

The Utilities/Customize Database/Field Preferences feature of Sumac has been extended to funder requests. Several fields can be renamed and made mandatory.

Grant Applications

Two fields were added to Grant Applications:

- a brief description field
- a grantee contact person

The Utilities/Customize Database/Field Preferences feature of Sumac has been extended to grant applications. Several fields can be renamed and made mandatory.

Import Workspace

A new Adjust Dates button has been added to Import Workspace. It lets you move a column of dates forward or backward by a number of years or months.

Membership

Membership type names can now be 255 characters long (formerly they were limited to 80 characters).

Payments

The Utilities/Customize Database/Field Preferences feature of Sumac has been extended to payments. Several fields can be renamed and made mandatory.

The status bar at the bottom of the Payments List window shows the total of the payments in the window.

Pledges

A new pledge report shows pledges and donations expected and received by month.

The Pledges Revenue Forecast report by can show each month separately.

The window for entering and editing a Pledge now has a Compute button for calculating the parts of a pledge (amounts, dates) that are based on other fields.

Reminders

The reminders calendar view lets you show reminders for several selected users at once.

The reminders calendar view has a drop-down that lets you show just meetings, just reminders, or both.

The Action Plan report for reminders has been moved from the Reports button to the Reminders list window, and converted to HTML.

Sales

The window for editing a product has a new OK/Inventory button which takes you straight to the window for entering a new inventory record for that product.

The window for choosing a product has been enhanced with additional searching options.

Time Dockets

All time docket reports have been moved from the Report button to the Time Docket list window and converted to HTML.

Time dockets now have start and end times, in addition to dates.

Time dockets automatically record when they are put into the database.

Tour Booking

These two reports have been converted to HTML format and moved from the Reports button to the Tour Booking Programs list window: Programs By Funder Request, and Time Spent By Personnel.

Volunteers (Tasks)

The Contacts by Volunteer Type report was converted to HTML, and is available in both the contacts list and the tasks list.

A task can be given end dates even though the task is not yet completed.

If tasks are related to Grow-Your-Own (GYO) records, the Utilities/Customize Database/Preferences command lets you restrict the creation of the GYO records so that they can *only* be created from a task.

Two new count fields (# Clients, # Services) were added to task records. They were added to help track resource usage, labour hours, clients served, or other indicators of service level. Recall that the Utilities/Customize Database/Field Preferences lets you rename and hide fields in task records, so if you do not want these, or any other fields, to show in your Tasks, you can hide them.

The task list window has a new command to create time dockets from information contained in tasks.

Volunteers (Tasks) – On Website

The Online volunteer management module has these enhancements:

In the Worker area, for tasks in the worker's Assigned list, there are two links on each task:

- Record Time: this lets a worker enter a time docket for the task
- Complete: this lets the worker indicate that the task has been completed

These new links are optional, using a Utilities/Customize Database/Preferences in the Tasks tab.

Wherever tasks are displayed, they should use the Show On Web settings from the Utilities/Customize Database/Field Preferences command.