



## **Version 4.2.2 Release Notes**

2013-11-21

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## **Introduction**

This document describes features which were added to release 4.2.1 of Sumac to create release 4.2.2.

## **Auctions**

A new window lets you quickly record the sale of a lot by entering a paddle number, lot number, and the lot's price.

## **Contacts**

There is a preference to disable the Duplicate button in the Contacts list window.

Date fields added to contact records (as extra fields) now have a calendar icon beside them, so you can enter a date by clicking.

Two new Search Builder search criteria make it easy to find contacts who have no email address, and contacts who have no postal address.

## **Course Registrations**

When a student registers on the website, an email is automatically sent to an internal user.

Searching in the registrations view lets you search by registration date as well as by class date.

You can launch the Forms part of your website without having to go through course registration. Note that an upgraded website package is needed to make this work.

You are warned if you define classes outside the date range of the session they belong to.

## **Donations**

A new *Donors in Date Range* report under Analyze & Report in the Donations list shows donors in various ways, and lets you specify what should and should not be in the report.

The Donations list window contains a Dashboard command (under Analyze & Report). It supports three different dashboard calculations: donor retention, donation amounts (counts, totals, mean, median, etc.), and a monthly summary (compare one year to another).

You can specify multiple Send-Recognition-To contacts. The scrolling list of contacts that used to be just for Influencers can now record both influencers and send-recognition-to contacts.

## **Fund Requests**

Add To Contact buttons can now add Fund Requests. Fund Requests show in the History tab of a contact.

## **Invoices**

Invoices support up to six charges (formerly three). Those not in use (based on settings in the Preferences dialog) are hidden.

## **Membership**

You can search memberships by Group. You can save and restore membership searches.

Membership records now have a Source field.

Membership records now have a Campaign field.

## **Pledges**

There is a new report, in the Pledge list window, which breaks down pledges by contact type.

## **Reminders**

The console window now has a button that opens Reminders in a calendar view instead of a list view.

## **Tasks (Volunteers)**

Tasks now support an Activity Type. If you create time docketts based on tasks, the activity type moves over to the new time docketts.

If the structure of your Skill Types/Skills is similar to the structure of your Programs/Activity Types, there is a preference to tell Sumac that when Skill Types/Skills are chosen, the Programs/Activity Types should be filled in automatically.

## **Ticketing**

The Ticket Sales Summary report shows numbers of tickets used as well as sold. Its surcharge table also includes an extra line that shows adjustments entered into the affected ticket orders.

A new Ticketable Status column in the Events list tells you if an event is ticketable and, if not, gives a reason why not.

The Ticket Orders list lets you search by Group.

## **Time Docketts**

Time Docketts now have an Event field. They are also searchable by Event.

## **Website Integration**

When the online transaction server encounters a problem (new database structure that requires a restart, cannot open a key), it sends an email to someone identified in the Preferences window.

You can now publish, on your website, a directory of your Grow-Your-Own records. The pages on your website enable a user to enter search criteria and see the matching records.