Version 4.2.7 Release Notes

2014-05-21

Contents

Introduction

This document describes features which were added to release 4.2.6 of Sumac to create release 4.2.7.

General

You can print a picture (from the contact record) in a label, facilitating the generation of ID or membership cards. When defining the custom layout to use, choose a Layout Element of type Picture.

The Preferences dialog lets you specify a colour for showing contacts who are marked Deceased. They appear in this colour consistently in virtually every window in Sumac.

The dialog used to choose which columns are showing in a list window now has buttons to save and load column selections.

Contacts

In a single contact's window, columns in the history tab can be sorted by clicking the column titles. Also, by splitting record types and dates into separate columns, the history tab is more readable.

In the Contacts list, the Contact Details report lets you specify the maximum number of communications you want to include in the report. Sumac now allows you to generate this report for up to 200 contacts at once.

When importing contacts into your database, you can import their pictures by specifying the file path to the picture file.

When importing Skill facts into contact records, you can specify the skill with its skill type, separating them with a vertical bar (e.g. skillType|skill).

Auctions

When importing lots into your database, you can import their pictures by specifying the file path to the picture file.

Course Registration

The location of a class can come from a drop-down menu, specified using the Lookup Lists command.

Donations

The batch selection dialog has been enhanced:

- It shows the batch IDs in a new column.

- You can click to sort its columns.

The donations list window has two new reports: first time donors, and repeat donors.

When you import donations, you can import their campaigns by specifying a full hierarchy of campaigns, separating parent campaigns from child campaigns using vertical bars.

When defining a fund, you can give it a fund type. Then you can search for all donations to a particular type of fund.

When defining a fund, you can give it a fund code. You can then search by fund code, specifying a pattern of characters. This is useful if your funds have rigidly formatted codes and you need to find specific characters in the middle of the fund code.

A Preference allows you to tell Sumac to lock financial information in reconciled donations.

Events

Three new columns can be displayed in the Events list window: revenue total, expense total, and the net revenue (i.e. revenue minus expenses).

Forms List

In the Sumac console window, when you click to view Forms, you are asked to choose which form to view. By having a different window for each type of form, you have the ability to show and save separate column preferences for each type of form.

Grow-Your-Own (GYO)

There are two enhancements to the GYO list dialog:

- There is a Reload button which reloads all contacts (the same as the Reload button in the Contacts list window). This is useful if users typically spend all their time working in a GYO window.

- The DIY list window can show contact languages in columns.

Import Workspace

The Import Workspace can validate skills that are entered with a skill type (e.g. skillType|skill).

International Support

Another piece of Sumac, mostly relating to ticketing and donations, has been translated into French. This was done by a Sumac user (Théatre La Seizième in Vancouver). If you are interested in helping with this translation work, please let us know.

Invoices

Invoices support discounts.

The invoice list has two enhancements:

- A payment summary can be displayed as a column in the list window.

- Searching allows you to find invoices that have a payment in a specified date range.

Memberships

A new report has been added to the memberships list window. It show a summary of monthly renewals: number, dollar value, new ones, renewals, and donations.

Payments

The window for editing a single payment has a link icon to show the contact record for the payer.

Pledges

When you import pledges, you can import their campaigns by specifying a full hierarchy of campaigns, separating parent campaigns from child campaigns using vertical bars.

Reminders

Two new commands in the Reminders list window facilitate moving from one step to the next using Action Plans:

- The *Select Complete Steps* command finds all reminders in the list whose bring forward date has passed and whose current step is flagged to complete when bring-forward date passes.

- The *Complete Steps* command marks the current step in all selected reminders as completed, then moves the reminder on to the next step. If the current step specifies things to do (e.g. send an email), then Sumac does them before moving to the next step.

Action steps can specify the details for an automatically-generated email.

Ticketing

Sumac now supports coupons or promotional codes which discount the price of tickets. These are defined as Discounts using the Lookup Lists window. You must specify which codes apply to each event. These coupons can be entered when using Sumac to create a ticket order or when entering a ticket order over the web. Note that only one coupon can be applied to a single ticket.

A seat block allows you to specify non-orderable seats on either end. This is used to help make seats line up properly in the presentation of an automatically-generated seating plan on your website.

The Ticket Orders list window now has a Mail Merge button

If an event is sold out, its name on a website is prefixed with "*** Sold Out ***", so that patrons will not choose to order tickets for that event.

Volunteers (Tasks)

When importing Skill facts into tasks, you can specify the skill with its skill type, separating them with a vertical bar (e.g. skillType|skill).

Web Integration

This release provides three significant enhancements to Sumac's web integration:

- The module that allows contacts to update their address and phone information now also allows them to specify their communication preferences.

- A new module allows people to add themselves to your database without doing any other sort of transactions. This enables them to sign up for your newsletter or other communications.

- Web-based ticketing supports coupons or promotional codes that can be used for encouraging sales and for tracking the benefit of advertising media.