Version 4.2.8c Release Notes

2014-08-08

Contents

Introduction

This document describes features which were added to release 4.2.8a of Sumac to create release 4.2.8c.

Case Management

The details of the fields in case management records are now specified using a new command: Utilities/Customize Database/Set up Case Management.

Communications

The communications list supports searching by communication source.

Contacts

Sumac now supports CQ Engage as an external email provider. CQ Engage can be used for more effective campaigns targeting members of U.S. governments.

Phone number fields now support 30 (formerly 20) characters. This is sometimes required for international dialing.

Course Registration

You can do a Mail Merge operation on Courses and Sessions in the Lookup Lists window. This can be used to create course catalogs.

Website access to course registration now allows a student to sign up for more than one course at a time.

The Payment Status window allows you to enter payments made by people other than the student.

You can search registrations by search builder groups.

When viewing course registration financial status on your website, a student now sees payments associated with sales of merchandise in addition to course registration payments.

Donations

The Donations list has a new Fundraising Status report that combines information about campaigns, pledges, communications, donations, and solicitors to provide a regular summary of your fundraising progress.

Memberships

Search Builder searches can now find contacts with memberships associated with a specific campaign.

Pledges

Payment purposes and accounts entered into the payment details of a pledge are now entered into the payment records created when the pledge is processed.

Ticketing

Search Builder searches can now find ticket orders by event group and package.

Tour Booking

The window for choosing related fund requests allows sorting of its columns. Also in this window, you can double click to see the details of a fund request.

Website Integration

Notifiers that inform you of changes to certain types of contact now work when the contact uses your website to update his or her own details.