Version 4.2 Release Notes

2013-08-30

Contents

Introduction

This document describes features which were added to release 4.1 of Sumac to create release 4.2.

General – User Interface

A third level of font sizes has been added: extra big ones.

When you load and save column choices in the Print window, it saves and restores line height and paper orientation settings.

General – Searching

The saving of searches in the Submissions (Auditions) and Grow-Your-Own list windows now shows the file name from which a search was loaded.

Auctions

Auctions can now be connected to an event. You can search for lots by event.

The Auction Attendees list window uses the new Sumac user interface.

When you drag lots to an auction attendee, a new window appears and you can enter sold prices. At the same time, the total value of items for an attendee is automatically re-calculated.

Auditions (Submissions)

The submissions list lets you search by Festival (or whatever you have renamed it to).

Communications

An extra level of security has been added to communications. You can specify that only users of a certain type are allowed to see communications of a certain type. For example, if you record communications of type "Medical Note", you might want to specify that communications of that type can only be viewed by users of type "Medical Staff".

Contacts

In the contacts list window, email commands have been removed from the Mailing command group and put together in a new Email command group.

The List Builder window now has Save and Load buttons so you can save a partially built list then, later, load it and resume work on it.

The Add To Contact button in the contacts list lets you add an identical membership or time docket records for many contacts at once.

Two new donation-related fields can be displayed in the contacts list: the campaign of the last donation that a contact donated to, and the total number of donations from a contact.

You can tell Sumac that a new contact must have at least one contact type specified.

You can generate mail merge documents then use new new Email Documents command to send them as attachments to personalized emails.

Contact Facts

Employment facts can now have start and end dates.

Award facts can have a date.

The facts list supports more powerful searching.

Search Builder can search for availability facts.

Course Registrations

You can define a relationship between contacts that allows people to see course registration information for those who are related to them. This is particularly useful for allowing parents to see the course registration information for their children.

Course definitions include an additional field for "facilities required".

Sumac enforces grade restrictions on registration for a course.

When allocating payments to a registration, negative amounts can be allocated, which supports allocation of refunds.

A new report shows teacher hours for each session.

Bulk Edit is available in the registrations list.

Donations

There is a preference that tells Sumac to automatically click "not receiptable" if a donation is below a specific value.

Two new donation-related fields can be displayed in the contacts list: the campaign of the last donation that a contact donated to, and the total number of donations from a contact.

A new report shows a month-by-month break-down of the number of donations by each donor.

A new report shows the number and value of donations by month.

A new report shows donations in a time period organized and summarized by the in-honour contact.

When choosing a batch for a donation or several donations, the window for choosing batches lets you display only recent batches, making it easier to find the one you are looking for.

Email

You can generate mail merge documents then use new new Email Documents command to send them as attachments to personalized emails.

If you use Sumac to send bulk email, it can track and count who clicks links in your emails.

Fund Requests

Mail Merge is supported in the Fund Program and Fund Requests lists.

Grow-Your-Own (GYO)

In GYO lists, you can show additional fields about each contact: age, address, contact types, gender, city, and phone.

You can specify that a field in a GYO record is an Alert. It then works like the Alert field in contact records: when the record is opened, the alert message appears on the screen first.

Labels

Avery 6466 (5366) labels are supported.

Ledger Entries

Sumac can now produce a report that shows ledger entries in a format appropriate for importing into Simply Accounting.

Mail Merge

Formulas in mail merge templates can have a new function: textDate. It converts what is probably a date, but is int a text field, into a date for calculation purposes. This enables you to do a variety of calculations on fields like extra fields in contact records, which may hold a date but actually be text.

Document templates can now be stored in the database, instead of just in files on a server. This is particularly convenient when some users do not have access to a shared file server, perhaps because they use the Sumac database from a remote location.

Memberships

The Add To Contact button in the contacts list lets you add an identical membership or time docket records for many contacts at once.

Payments

Sumac now integrates with a new payment processor: Moneris.

If you use Beanstream to process payments, Sumac now attempts to convert long-form state and province names into two-character abbreviations.

Payment types can be marked as inactive.

Products

Sales of products as extras associated with a registration now reduce inventory levels automatically.

Reminders

In the Calendar view of reminders, if you click to create a new reminder, you are asked if you want it to use an action plan.

The Calendar view of reminders has a button that takes you to the current day, week, or month.

Search Builder

It is now easier to click and drag the little red corners on search boxes.

Ticketing

The ticket orders list supports an additional column: Package Summary. This displays information about packages (subscriptions) purchased as part of the order.

Time Dockets

The Add To Contact button in the contacts list lets you add an identical membership or time docket records for many contacts at once.

Website Integration

A new release of the Sumac web packages provides the ability to change all text that is visible on the web pages. Among other things, this provides support for translating the pages to a completely different language.

If you use Sumac to send bulk email, it can track and count who clicks links in your emails.