



## **Version 4.2s.15 Release Notes**

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## Introduction

This document describes features which were added to release 4.2s.14 of Sumac to create release 4.2s.15.

## General

The Settings/Appearance window has an option that assigns keyboard shortcuts to as many left-side menu buttons as possible. This lets users who prefer keyboards perform most commands with their keyboards.

The window for printing labels and envelopes lets you specify that you want to print multiple copies of each label.

## Campaigns

When you are asked to choose a campaign, perhaps when entering a donation or communication, the list of campaigns is automatically displayed in reverse chronological order.

## Collection Management

You can now show the donor of an object in the Collection Objects list window.

Collection objects are loaded from the database much faster.

## Communications

In databases with large numbers of communications, searches by communication type are thousands of times faster.

## Contacts

The Not Receiptable flag in contact records is searchable.

The window used to choose a Contact shows each contact's gender. This helps distinguish between similarly named individuals, households, and organizations.

The email address for assistants (on the Business Address tab) has a checkbox for *Send to this email address*, used when Sumac does Bulk Email. It also has a link icon to send a single email to the assistant's email address

The email address on the Vacation Address tab has a checkbox for *Send to this email address*, used when Sumac does Bulk Email.

When it first appears, the Facts tab in a contact record is sorted by fact type.

Related contacts' business titles show as a column in the Relations tab of a contact record.

When a contact is added to a Sumac database from your website, and Sumac automatically sends the new contact an email, Sumac saves a communication record to indicate that this email was sent.

The contacts list window can show two additional donation fields: the amount and date of the donor's first donation.

When you search contacts for certain values in an extra field that holds a number, the search is done using numerical ordering instead of alphabetical ordering. So the search will see "11" as being greater, not less than, "2".

Search Builder can find contacts with at least a specified number of registrations or distinct teachers.

## Course Registration

Search Builder can find contacts with at least a specified number of registrations or distinct teachers.

In the registration view window, you can search for registrations by the billing contact name or ID. You can also search for them by funding source.

When you add registrations to an invoice, you can add several at once instead of having to add them one at a time.

When choosing a session, if there are several on the same date, the window that shows a list of sessions shows them sorted by their session code within the date.

You can create a notifier that sends a message when a new course registration is added to the database.

In the registration view window there is a report that shows supplementary items ordered by students in one session.

You can export a course's ID and course code.

When registering for a course on your website, the log-in page allows the student to either enter his contact info right on the page to create a new contact, or log in with an existing email address and password.

When entering a supplementary item in a registration, Sumac recalculates the total when either the quantity or unit price is manually changed.

The Lookup List dialog allows you to Bulk Edit sessions.

If a session is marked *do not display on web* then it is not displayed in Course History on your website. It is also not displayed in Account Transactions if the total fee charged was zero.

## **Donations**

The search criteria for donations are sorted alphabetically.

Mail merge operations on donations now support merge codes for the email address and phone number of the send-recognition-to contact.

The contacts list window can show two extra donation fields: the amount and date of the donor's first donation.

Instead of always showing all donation batches, you can now search the list of donation batches.

## **Email**

When you Send Bulk Email and use a Quick Compose message, Sumac does a mail merge on the message. This mail merge operation was previously limited to the body of emails coming from template files.

The Bulk Email window asks if you want to send the same attachments that you sent the last time. It used to just use them without telling you it was going to do so.

## **Events**

The list of events allows you to Bulk Edit events.

## **Fund Requests**

There is a report showing donations by funders over many years. It is in the Fund Programs list window.

## **Grow-Your-Own (Custom Add-Ons, GYO, Forms)**

GYO records now support formulas for lookup lists. Note that the formula must calculate the ID of the lookup list entry desired.

## **Invoices**

When you add registrations to an invoice, you can add several at once instead of having to add them one at a time.

When editing an invoice, the list of charges allows more space to show the details of each charge.

When doing a mail merge on invoices, the merge code *iv\_charge\_details* show more financial information about course registrations.

In payment batches, the payment's date is used to set the When Paid date of an invoice created from the payment.

If specified, the When Paid date of an invoice is put into the When Received date of a donation created within the invoice.

If specified, the When Paid date of an invoice is put into memberships created within the invoice.

## **Ledger Entries**

In the Ledger tab of the Preferences window, checkboxes turn red if the options required for correct ledgerizing are not all specified.

## **Memberships**

If specified, the When Paid date of an invoice is put into memberships created within the invoice.

There is a preference to make the fee in a renewed membership the same as the fee in the old membership, instead of taking the renewal fee from the membership type.

## **Payments**

If you use Chase Paymentech as your payment processor, Sumac will now allow transactions with an incorrect state or province to be sent for processing. This allows out-of-country transactions to proceed.

The Payments list window lets you search with a date range instead of having to separately specify a start and an end date.

## **Payment Batches**

In payment batches, the payment's date is used to set the When Paid date of an invoice created from the payment.

## **Pledges**

You can search pledges by event.

When creating a Pledge, when you pick a contact the contact's name is filled in to the CC Name field of the payment record.

The Bulk Edit command can now edit notes in pledges.

## **Products**

Add a contact field to product records. Allow a search of sales by these contacts. This enables consignment selling, since you can record the consignor in the product record, and find products.

## **Reminders**

In the Reminders list, Bulk Edit lets you set the complete flag and completion date

Searching for reminders allows you to search by completion status (completed or incomplete).

## **Reports**

In the registration view window there is a report that shows supplementary items ordered by students in one session.

There is a report showing donations by funders over many years. It is in the Fund Programs list window.

The membership retention report now works for either fiscal or calendar years.

The *Communications - days between pairs of communication types* report can now work without an event being chosen.

The window used throughout Sumac for showing HTML reports now has a Show Contact button.

## Sales

There is a new field in sales: a Shipper Note. This is a note for the shipper like “Leave on the front porch”, or “no signature required”.

Product records can now be connected to a contact. This enables consignment selling, since you can record the consignor in the product record. You can search sales to find sales that contain products connected to a particular contact.

When entering a Sale, a user can change the unit price of an item in a sale. This allows you to have a single sale product that covers many low volume items. Note that this feature is restricted to users who have been given the capability of changing order pricing.

The Shipping Address window has a button that sets all fields from the contact record for the sale.

The database structure has been changed so that the shipping address in sales records is now in 10 separate database fields instead of being compressed into one. This makes it easier for other computer systems to extract fulfillment details from the Sumac database.

The ID of a sale shows in the History tab of a contact record and in the list of charges in an invoice.

## Security

The transaction log can be searched by user.

Failed log-on attempts are now logged.

A user profile can specify that a user should be able to edit the list of users, but only those in his or her own segment. This gives a non-admin user the ability to edit a restricted subset of the users.

The logging of Grow-Your-Own records can now record creation, editing, viewing, and deleting.

## Ticketing

The Shipping Address window has a button that sets all fields from the contact record for the ticket order.

The merge code *u\_event\_id* works in mail merges with ticket orders.

You can specify a donation to be associated with an order of tickets. The donation is specified in the price scheme and it can be a fixed dollar amount or a percentage of the price of each ticket.

You can limit how many tickets any one contact is allowed to purchase.

There is a new field in ticket orders: a Shipper Note. This is a note for the shipper like “Leave on the front porch”, or “no signature required”.

## Time Dockets

In time docket, task types and programs can be restricted by departments

## Volunteers (Tasks)

In tasks, task types and programs can be restricted by departments

The functionality of Sumac’s volunteer management is being extended to websites. Most of the web-based volunteer management is working now, but it is not yet production-ready. If you are interested in this new feature, let us know.

## Website Integration

When registering for a course on your website, the log-in page allows the student to either enter his contact info right on the page, creating a new contact, or log in with an existing email address and password.

If a session is marked *do not display on web* then it is not displayed in Course History on your website. It is also not displayed in Account Transactions if the total fee charged was zero.

You can now have two new parameters in the URL which allow you to use an alternative string file and/or an alternative parameters file. The parameters are *strings=xxx* and *params=xxx*. In both cases, *xxx* must be the name of the file and the file must reside in the user folder. This enables a variety of things, for example:

- you can have the same website support multiple languages by providing different strings files in different languages
- you can have many different signup2 page presented by one website.

When defining a text field that is to be displayed as a group of checkboxes in a form, you can specify the number of checkboxes per row. This works on websites as well as inside Sumac itself.

If you publish lists of Grow-Your-Own (GYO) records to your website, there are now two preferences, one to specify who can see the GYO records and one to specify who can change them.

Funds displayed in a donation page are sorted by fund order, then by description, then by name (depending on which fields are present).

You can specify whether a skill should show in tasks displayed by the volunteer management module on a website.

When a contact is added to a Sumac database from your website, and Sumac automatically sends the new contact an email, Sumac saves a communication record to indicate that this email was sent.

The functionality of Sumac's volunteer management is being extended to websites. Most of the web-based volunteer management is working now, but it is not yet production-ready. If you are interested in this new feature, let us know.