



Version 4.4.15 Release Notes

2018-07-04

Contents

Introduction	– 2
Contacts	– 2
Awarding Grants	– 2
Course Registration	– 2
Custom/Grow-Your-Own	– 2
Donations	– 2
Invoices	– 2
Pledges	– 2
Sales	– 3
Search Builder	– 3
Time Dockets	– 3

Introduction

This document describes the features added to release 4.4.14c of Sumac to create release 4.4.15.

Contacts

You are now able to view Contact pictures as a column in the Contact list.

Administrative Settings

You are now able to add an extra field to Contact records that functions as a link field in the same way that the website field does in the address tab.

You are now able to Bulk Edit the “Annual Receipt” and “Not Receiptable” flags on the Basic tab of a Contact record.

You are now able to hide the following fields from the Basic tab of a Contact record:

- Alert
- Notes
- Languages
- Renewal
- Time Zone

Awarding Grants

You are now able to rename the Reviewer fields in a Grant Application Record.

Course Registration

You are now able to view Registrant Age as part of the Attendance Sheet report in Course Registrations.

Custom/Grow-Your-Own

You are now able to export information about any Event linked to your Custom record from the Custom record list.

Donations

Some changes have been made in the way that Sumac handles donation receipting:

- The receipt number is now generated first, and saved into the donation record before the mail merge occurs
- You are now able to regenerate receipts for any receipt number created *after* July 4th, 2018
- Online donation pages have improved communication with database to ensure each receipt number is only used once

In the Donations list, you are now able to add a Campaign (and it’s parents) column that shows you the Campaign a Donation is assigned to, along with the Campaign parents.

You are now able to see Fund Name as a column in the Reconciliation Report/Batch (Summary).

Invoices

You are now able to assign a default contact to be used as the Billing Contact in Invoices.

Pledges

The pledge summary in a Contact's history now shows the remaining balance a contact owes on any given pledge.

Sales

In the Products list, you are now able to bulk edit certain Product fields.

Search Builder

The “Donation matching assorted criteria” criterion now has new variable options:

- Date of last donation
- Amount of last Donation
- Number of Donations

The “Memberships matching assorted criteria” criterion has new variable options

- Payment Type
- Expiring in Date Range
- Gift Membership
- Source

Time Dockets

You are now able to make the Start and End Time fields mandatory in Time Dockets.