



Version 4.4.2 Release Notes

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Introduction

This document describes features which were added to release 4.4.1 of Sumac to create release 4.4.2.

Security and Administration

An administrative user can now specify a setting which tells Sumac to control which users can see a specific contact's Grow-Your-Own (GYO) and Case Management records. Visibility is based on the type of the user that is viewing the records and the user type of the contact. This preference can be found in Preferences/GYO or Preferences/Case Management tabs respectively.

Sumac is now able to log the creation, editing, and deletion of time dockets. Set this preference in the Preferences/Security window.

A Sumac administrator can cause extra fields in contact records to appear on any tab in the contact record.

General

Export & Print

Sumac now automatically encodes exported text files in UTF-8 format, so that they can be opened in all versions of Excel.

Mail Merge

The Mail Merge Codes window now has a testing context for Grant Applications.

Offices

The SMTP server field in an office record now allows for entry of up to 100 characters (formerly 50).

Awarding Grants (Grant Applications)

Sumac now allows space for up to six reviewers (formerly four).

Administration

The Accounts lookup list has been added to the Awarding Grants area of Utilities/Customize Database/ Lookup Lists.

As an administrative user, you are now able to bulk edit several fields in Grant Application records.

Awarding Grants & Disbursement Records

We have created a link between Grant Application and Disbursement records. You can see the change in the following areas:

- Link and create a new Disbursement or view existing linked Disbursements for applicants from within the Grant Applications list.
- Link more than one Disbursement to a particular Grant Application.
- Search Grant Applications list based on disbursement status.
- Click a link icon in a Disbursement record to show the associated Grant Application.
- Search for linked Grant Applications from within the Disbursements list.

Email

Sumac now sends a "Thank you for your application" email to a grant applicant only when the applicant indicates that the form is complete.

The Mail Merge Codes window now has a testing context for Grant Applications.

Campaigns

The appearance of the Campaign list window has been changed to differentiate parent campaigns from child campaigns by colour.

Contacts

A new field has been added into the Basic tab of a contact record to record the contact's date of death.

When editing a contact record, you can now get the address information from any contact that is related to the one you are currently editing.

In a Contact records vacation tab, Sumac has two new buttons: Duplicate Last, and Copy to Clipboard. These buttons let you duplicate the last address you entered, or Copy the entire address to your computer's clipboard, respectively.

A Sumac administrator can cause extra fields in contact records to appear on any tab in the contact record.

Search

Sumac now excludes leading articles such as "the", "une", and "las" when sorting by the "Name (Last First)" column.

Disbursements

We have created a link between Grant Application and Disbursement records. You can see the change in the following areas:

- Link and create a new Disbursement or view existing linked Disbursements for applicants from within the Grant Applications list.
- Link more than one Disbursement to a particular Grant Application.
- Search Grant Applications list based on disbursement status.
- Click a link icon in a Disbursement record to show the associated Grant Application.
- Search for linked Grant Applications from within the Disbursements list.

Disbursement entries can now be ledgerized, and thus exported into accounting programs.

The Disbursement area and Accounts list were added to Utilities/Customize Database/Lookup List.

Donations

When Sumac sends a default e-mail confirmation for a donation made as part of a membership transaction on your website, the last four digits of the credit card used are included in the confirmation.

All Donation Reconciliation reports have been moved from the main console Report button to the Donations list window.

Events

Sumac can now support up to 16 coupon options for one single event (formerly 4).

Forms

Sumac now sends a "Thank you for your application" email to a grant applicant only when the applicant indicates that the form is complete.

In the Form selection window, you are now able to begin typing the name of your desired form and Sumac filters the list by what is typed.

Sumac now calculates formulas as the user is entering a form on your website.

Grow-Your-Own (GYO), Case Management

An administrative user can now specify a setting which tells Sumac to control which users can see a specific contact's GYO and Case Management records. Visibility is based on the type of the user that is viewing the records and the user type of the contact. This preference can be found in Utilities/Preferences/GYO or Utilities/Preferences/Case Management tabs respectively.

Importing

You are now able to import Product Type A, and Product Type B lookup lists.

You can now import the Product Type A and Product Type B fields when importing Product records.

Memberships

The Monthly Renewals report in the Membership list now runs *much* faster than it used to.

Schema

You are now able to search through a Schema list when you are editing or entering schema entries in Utilities/Customize Database/Schema Entries.

Ticketing

The Sold Tickets report now has an "Order Paid" column that shows whether or not the order has been paid in full.

Surcharges can be made to only apply for orders whose total value (excluding surcharges) is greater than 0.00.

Sumac can now support up to 16 coupon options for one single event (formerly 4).

You can now control how many barcodes or tickets are printed per page for a ticket order. An administrative user can now specify for Sumac to print up to 12 barcodes per page in the Preferences/Ticketing tab.

Reports

Reports for Ticket Orders are now found in the Ticket Orders list, and have been removed from the Reports button in the main Sumac console.

Website Integration

When purchasing a ticket on your website, the donation amount displays separately when the user is checking out.

For ticketing on your website, you now have more control over the display of buttons relating to choosing seats.

Time Dockets

Sumac is now able to log the creation, editing, and deletion of time docket. Set this preference in the Preferences/Security window.