Version 4.4.3 Release Notes

2017-04-12

Contents

Introduction

This document describes features which were added to release 4.4.2 of Sumac to create release 4.4.3.

General

All reports have been moved from the reports button in the main Sumac console. They can now be found in the corresponding list window under Analyze & Report.

Sumac is now able to scale a document to the size of page you are printing on. A checkbox has been added to the print dialog to enable this option.

Appearance

You are now able to choose a new large font size.

You can now specify which columns appear in the Utilities/Sumac Administration/Users dialog.

Mail Merge

You are now able to merge a contact's picture into a DOCX document template.

Searching

You can now search by the term "does not contain" in any search type where the field is a checkbox group.

You are now able to search the contents of text fields in all list windows.

Auditions and Submissions

You can now search for Submissions by their title in the submissions list window.

Awarding Grants (Grant Applications)

Some fields in Grant Applications have increased character limits.

You can now view contact fields as columns in the Grant Applications list for any contact that is linked to the Grant Application record.

Awarding Grants & Disbursement Records

You can now set default account codes for disbursements based on grant type. This change results in:

- four new account fields in Grant Application Types
- enhanced ledger entries for disbursements for grant application.

Reports

There is now a Quick Count report in the Awarding Grants module. The report can be found in the Grant Applications list window under Analyze & Report.

You are now able to generate a report from the Grant Applications list that includes information from application forms and the awarding grant records. Do this using mail merge formulas that insert data from each of these types of records.

Course Registration

In the course registration module's registration view dialog, there is now a Print Receipt button. Use this button to print receipts for selected registrations from the list.

Before you are able to use this button, a Sumac Administrator must set the template for Sumac to use when printing receipts. You can set the template in Utilities/Customize Database/Preferences/Course Registration, in the drop down menu *Choose the template to print receipts*.

Grow-Your-Own (GYO), Case Management

An administrative user is now able to bulk edit field definitions for GYO, Case Management and Form records. This can be accessed through Utilities/Customize Database/Grow-Your-Own or Case Management/ Special Editing/Bulk Edit.

Memberships

Memberships for an employer now show in the history tab of an employee, and vice versa. To enable this feature:

- Specify which relationship means "works for" in Utilities/Customize Database/Preferences/Contacts.
- Set the *In the contact history, show memberships for organization's employees* checkbox in Utilities/Customize Database/Preferences/Memberships.

Ticketing

You are now able to to specify a PDF template for Sumac to use to format each individual ticket when doing mail merges on ticket orders. You must set this template in Utilities/Customize Database/Preferences/Ticketing.