Sumac Data Migration

Terminology & Defaults Guide

Table of Contents

Data Mapping Basics

Parts of the Data Mapping Document

General Notes

This section provides details about the client's Sumac license.

Database Configuration

This section provides details about the basic configuration of the client's database.

Country:

Certain aspects of the database configuration will depend on the client's country:

Australia	
Format mailing addresses using this postal standard:	United States Postal Service
Allow the following postal codes:	Australia
Default phone number format	Australia (99 9999 9999)

Brazil	
Format mailing addresses using this postal standard:	United States Postal Service
Allow the following postal codes:	Brazil
Default phone number format	North America (999-999-9999)

Canada	
Replace "State" with:	Province
Format mailing addresses using this postal standard:	Canada Post
Allow the following postal codes:	Canada; USA
Default phone number format	North America (999-999-9999)

Ireland	
Format mailing addresses using this postal standard:	United States Postal Service
Allow the following postal codes:	Canada; USA
Default phone number format	Ireland (various)

Mexico	
Format mailing addresses using this postal standard:	United States Postal Service
Allow the following postal codes:	Canada; USA
Default phone number format	Mexico (various)

United Kingdom	
Format mailing addresses using this postal standard:	United States Postal Service
Allow the following postal codes:	United Kingdom
Default phone number format	United Kingdom (various)

USA	
Format mailing addresses using this postal standard:	United States Postal Service
Allow the following postal codes:	Canada; USA
Default phone number format	North America (999-999-9999)

All Other Countries	
Format mailing addresses using this postal standard:	United States Postal Service
Allow the following postal codes:	Canada; USA

All Other Countries	
Default phone number format	North America (999-999-9999)

Database Customization

This section will only be included if applicable. It contains details about how the database will be customized according to the client's needs and specifications.

As a rule, this section will only include information not already covered in the Client Data Files section.

Supplementary Documents

This section will only be included if applicable. It a list of documents that provide additional information about database customization or additional instructions about how to handle data found in the client's files.

Client Data Files

This section makes up the majority of the mapping document. It list all of the data files sent by the client, along with detailed instructions about how the data in each will be migrated to Sumac.

For each file sent, we will include the following:

1. File Name

   a) The name of the file sent by the client

2. Number of columns of data in the file

   a) Only columns that contain column headers (titles) are counted

3. Number of records

   a) The number of rows in the file that contain data

4. Number of contacts

   a) This count includes the number of rows in a file containing information about contacts as well as any contacts listed in additional columns.

   • Example: where a file contains columns listing spouse names or childrens' names and birth dates

   • Example: where a file contains additional columns listing contact details specific for employees in an organization

5. Sumac records to be created

  a) The types of records that will be created in Sumac from data in this file

  • Example: Contacts, Donations, Communications

6. Special Instructions (if applicable)

  a) This will only be included when there are additional instructions about how to handle this file.

  • Example: Create additional contacts for children. Link them to the main contact with the relation type "child of".

  • Example: Give all contacts in this file the contact type "Volunteer"

7. Mapping Table

  a) The mapping table contains details about what we will do with each column of data in the file. It contains four columns:

  • Spreadsheet Column: Lists the title (column header) of each column of in the file

  • Sumac Area: Identifies the area of Sumac (record type) the specified column will be migrated to

  • Sumac Field Name: Identifies the *exact* name of the Sumac field that the specified column will be migrated to

  • Details (if applicable): will contain additional details about how to migrate the data from the specified column

Multiple Files with Identical Columns

When several files contain an *identical* number of columns with *identical* column headers, and an *identical* set of instructions, we will treat them as a single file. The files will be listed together in the mapping, preceded by the following instruction:

  • "The following files contain the same column pattern. Append them before formatting:"

Terminology

This section provides definitions and explanations for examples of instructions frequently found in data mappings.

Discard

When a file or column of data will not be moved to Sumac, we will enter "discard", either below the file name, when the discard applies to the entire file, or under *Details* in the mapping table, when the discard applies to a specific column of data. We will also include the reason for the discard.

NB: This table lists examples of reasons for discard commonly found in data mappings.

In Data Mapping	Definition
discard: as per client's instructions	Indicates the client requested the discard.
discard: empty	Indicates that there is no data in the file or column, and therefore can be ignored during the actual data migration. This *does not* mean that this type of data cannot be recorded in Sumac. It just means that there is nothing to move into Sumac.
discard: no column headers	Files that do not have column headers will not be included in the data migration.
discard: not licensed	Indicates that the data in the file or column belongs in an add-on for which the client is not licensed. We will include a note that identifies which add-on the data belongs to.
discard: process data	Indicates that the data in the file or column is generated by the existing system or that it is used to generate other data. This type of data is common in database tables (age calculated from birth date, amount of all donations, date the record was last updated, etc.), but can also be found in spreadsheets (sums and other formulas).

In Data Mapping	Definition
discard: redundant data	Indicates that the data in the file or column duplicates data recorded elsewhere in the data sent. This type of data is common in database tables that present the same information in various combinations (eg. FirstName; LastName; FirstName LastName; LastName, FirstName). Redundancy is also common when dealing with multiple spreadsheets. For example, a spreadsheet containing board member donations (amounts,dates, etc.) is likely duplicating data in a spreadsheet containing a complete history of donations.
discard: unacceptable file format	Files that are not in table format will not be included in the data migration Example: • Word Documents, PDFs, PowerPoint Slides
discard values where records contain [blank]	Indicates that a specific values are to be removed from records, as opposed to an entire column of data. discard values where records contain (000) 000-0000

Instructions that Apply to Entire File

An instruction will appear in the specifications before a mapping table when the same value in a Sumac field will be applied to all the records in the file.

NB: This table lists examples of instructions commonly found in data mappings.

In Data Mapping	Definition
Give [records] the [sumac field] "[blank]"	Indicates that all the records in the incoming data will be assigned the same value in the specified field. Example: • Give contacts the volunteer type "Facilitator"

In Data Mapping	Definition
Where [columnname] contains data, use Business Address	When individual & organization addresses are listed together in the incoming data, we put addresses belonging to individuals (people) in the Residence Address fields and addresses belonging to organizations in the Business Address fields. Example: • Where Company Name column contains data, use Business Address.
Data in columns inconsistently entered	Indicates that data in the file does not appear to correspond to column headers. This is a heads up that the client should take a closer look at the file before proceeding with the migration. Example: • Phone Numbers column contains a disproportionate number of Postal Codes, Email column contains a disproportionate number of phone numbers, etc.

Details

If there are any special instructions for a column of incoming data, they will be entered in the *Details* column of the mapping table.

NB: This table lists examples of instructions commonly found in data mappings.

In Data Mapping	Definition
###	Indicates we are unsure about something in the data. This does not mean we are questioning the validity of the data. It simply means we require some clarification in order to assign the data to the right place in Sumac.
### client to advise	Indicates that the client needs to get back to us about how to map a particular column of data. This will not appear in an initial data mapping, but after a mapping discussion.

In Data Mapping	Definition
[add/subtract] to [datefield1] to obtain [datefield2]	Indicates that a date is to be calculated based on a duration in the column. Example: • Add to Membership Start Date to Obtain Membership End Date
against Sumac's recommendation	Indicates Sumac recommends a different instruction.
Append to data in [blank] column	Indicates that contents of this column will be merged with the contents of another specified column. Example: • Append to data in Donation Notes column.
Append with "[blank]"	Indicates the contents of the column will be followed with the text between the quotation marks.
as per client's instructions	Indicates that the data is mapped according to the client's instructions.
Assign new Sumac IDs	When two incoming systems use the same IDs to identify different contacts, new Sumac IDs will be assigned to the second set of incoming contacts.
Create [blank] contacts	When a file contains columns with information about additional contacts, we will create new contacts in the database. Additional contacts will be given a lower case identifier in the mapping (spouse Contact). These additional contacts will be counted in the Total Number of Contacts listed at the beginning of the data mapping document. Example: • Where a file has columns labelled *FirstName*, *LastName*, and *SpouseFirstName, Spouse Phone,* we will create a "spouse Contact"

In Data Mapping	Definition
Create [blank] communications	When a file contains details for multiple communications per record, they will be clearly labelled. Example: • Incoming data contains columns labelled *Date Application Received*, and *Date Acceptance Letter Sent.* • We will create two communication to records: "application Communication", and "acceptance Communication". • Columns containing details for each communication will be preceded by the appropriate lower case identifier (application Communication).
Identifies in which fields to put data from [columnname] column	Indicates that data in another column is to be split up amongst several fields in Sumac. This is most frequently seen with address and phone number information. Example: • A column labelled "PhoneType" identifies in which fields to put data from the "Phone". (Residence Phone, Business Fax, Residence Email, etc.)
Link to [main contact] with relation type [blank]	Indicates that additional contacts in the record will be linked to the main contacts using a specified relationship. Example: • records contains columns for names and birth dates of children of the main contact: "Link child1 Contact to main Contact with the relation type 'child of'".
Precede with "[blank]"	Indicates the contents of the column will be preceded with the text between the quotation marks.
Re-name [blank] to [blank]	Indicates that an existing value should be re-named in Sumac. This instruction is usually added at the request of the client. Example: • Rename Counsellor to Leader

In Data Mapping	Definition
Re-name [sumacfield] field to	A few Sumac fields can be re-named to suit the needs of the client. This indicates which field will be used and what its new name will be. Example: • Re-name Renewal field to Date of Death
Split column on "[blank]"	Indicates that data in the column belongs in separate fields in Sumac, and must be split into two or more columns. The character that should split the column will be identified between quotation marks. Example: • for a column containing [LastName, FirstName]: Split column on "," Variation: • for a column containing [LastName FirstName]: Split column on last "[space]". NB – These are blanket operations performed indiscriminately on *all* values in a column. For this reason, a fair amount of post migration clean-up by the client may be necessary.
Tab: [blank]; Name: [blank]	Used to specify the tab name and field name of an Extra contact field.
The values in this column belong in several different fields in Sumac. They will be assigned to the appropriate fields in Sumac, as outlined in the [FileName: ColumnName] document.	Frequently, data currently being collected in a single field or column really belongs in a number of different fields in Sumac. When this is the case, we will create a separate document listing all the values listed in the column and identifying where each will go in Sumac. Example: • a Donation Category column contains the values Golf Tournament, Board Donation, and Spring Mailing • These will be split amongst three fields in Sumac (Event: Golf Tournament, Donation Type: Board Donation, Campaing: Spring Mailing).

In Data Mapping	Definition
Use [codes/IDs] in conjunction with [othercolumn values] to turn [blank] codes in other files into names.	Indicates that data in this file is to be used to turn codes or IDs in other data files into full text values as mapped in this file. This is typically seen in databases when tables containing records (contacts, donations, etc.) are linked to tables containing lookup list values. Example: • Use DonationCategoryIDs in conjuction with data in Donation Categories column to turn DonationCategoryIDs in other files into donation category names.
Use data in [filename] to turn these codes into names	Indicates that the corresponding name values for codes in this column are found in a specified file. This is typically seen in databases when tables containing records (contacts, donations, etc.) are linked to tables containing lookup list values. Example: • Use DonationCategories.xlsx to turn these codes into donation category names.
Use these IDs to link data in this file to data in [blank]	Indicates that database tables in the incoming data are linked using the IDs in the specified column. Example: • Use these IDs to link donations in this file to pledges in Pledges.xlsx Variation: • Use these receipt numbers to add data in this file to donations in Donations.xlsx

In Data Mapping	Definition
where records contain "[blank]"	Indicates that records containing certain values will be treated in a specified manner. Example: • Donation/Cancelled Receipt, where records contain "TRUE" (Only records marked TRUE will be checked as having a cancelled receipt) • Where records contain "Paid", create payment records. • Contact Type where records contain Board, Student, Stakeholder; Communication Preference where records contain Newsletter, Phone, Media

Duplicate Records

Because we cannot make assumptions about client data, we are unable to identify and completely remove duplicate records from incoming data. We will, however, employ some measures, at the time of migration, to reduce the number of duplicate contacts.

Contact Records

Where a single file contains contact information *in addition to* First and Last names, we will identify duplicates where the contact information in <u>ALL</u> contact fields is identical.

In order for records to be considered identical, <u>ALL</u> entries in <u>ALL</u> columns for each record must <u>*EXACTLY*</u> match those in another records.

This method of reducing duplicate contact records can only be performed within a single file of data. If the same contacts appear in several separate files of incoming data, they will have to be cleaned by the client after going live with Sumac.

Other Records

Since it is possible for multiple records containing identical details to exist in a database, we will not remove duplicate records of any type other than contacts.

It is the client's responsibility to ensure that the data they send for migration does not contain duplication.

Defaults and Standard Practices

There are a number of default values that we will apply to data during the data mapping and the data migration phase. Sometimes these are the result of missing information in the incoming data (to fill mandatory fields in Sumac, for example), or to allow Sumac's automatic functions (for example, using the correct address, selecting the most appropriate volunteer).

Unless otherwise stated in the data mapping, the we will employ the defaults and standard practices listed here.

Contact IDs

When two incoming systems use the same IDs to identify different contacts, new Sumac IDs will be assigned to the second set of incoming contacts.

The original contact ID will be retained in an Extra contact field titled "Original ID".

A map of new IDs and their corresponding original IDs will be kept to ensure any other records using these IDs will be linked to the correct contacts during migration.

Gender

The gender "Organization" will be assigned to all contact records identified as organizations.

Addresses

Use Business Address

Unless otherwise specified, The *Use Business Address* checkbox will be checked where incoming data contains a business address.

Dates

Date Format

All dates in Sumac must be complete, and entered in the format yyyy-mm-dd. Where dates in the incoming data are incomplete, we will first look at column headers and file names to fill in the blanks. Otherwise, we will default to the following values:

yyyy: 1900
mm: 01
dd: 01

Example: if the date appears as 04/2015 in the incoming data, we will convert it to 2015-04-01.

Inconsistent Date Formats in Incoming Data

When inconsistent date formats appear in a single column, it is impossible to determine which values are month, day, or year.

For example:

2015-04-06 (either 04 or 06 could be day or month)

03/10/12 (any of these could be day, month, or year)

01-Apr-10 (either 01 or 10 could be day or year)

When dates are formatted consistently, we can usually identify day and year by looking for values that are higher than 12. But when several date formats are used in a single column of data, we cannot guarantee that dates will be accurate in Sumac.

Phone Numbers

Phone Number Formats

Sumac can be configured to follow *one* of the following phone number standards:

- North America (999-999-9999)

- Australia (99 9999 9999)

- United Kingdom (various)

- Mexico (various)

- Ireland (various)

Defaults for All Phone Numbers

If there are any errors with phone number formats, we will precede the number with "+".

Phone numbers will be migrated to the field specified in the data mapping regardless of any text identifying otherwise in the data.

All non-numerical characters (text) will be deleted.

Example: The following apppears in a a column mapped to the Residence Phone field

- "123-456-7890 (fax)"

- It will be migrated to the Residence phone field as "123-456-7890"

 We will create an error report containing all phone numbers with non-numerical

characters for your review after the data migration.

Default for North American Numbers

If the three digit area code of North American numbers is not in the incoming data, Sumac will default to "000".

Email Addresses

Email Format

Email addresses in Sumac must follow this exact format, with each part (each different colour) formatted correctly:

- username@domain.dnslabel

  - Example: support@sumac.com

- the username cannot contain spaces or the following characters: "(),:;<>@[\]

- The domain name must be made up of alpha numeric characters. Hyphens are allowed, provided they are not the first or last character.

- The @ symbol and the dot-separated DNS label must be included.

Default Repairs for Email Addresses

Sumac will not accept email addresses that do not follow the exact format detailed above. We are able to fix the following common errors:

- Spaces in address: we will remove spaces

- Comma separating DNS label (,com): We will replace the comma with a dot (.com)

- Missing DNS label (support@sumac): We will default to ".com"

Other Errors in Email Addresses

Since errors other than those listed above would require guesswork on our part (eg. unacceptable characters, missing username, missing domain name), they will not be imported into Sumac.

We will create an error report containing all email address errors for you review after the data migration.

Appended Data

When the contents of two or more columns will be merged into a single field (column)

of data, the contents of each column will be separated by a semicolon followed by a space (“; ”).

Mandatory Fields

Each area of Sumac has at least one mandatory field. If the information necessary to fill these mandatory fields is incomplete or missing from the incoming data, we need to fill in the blanks.

The tables below lists all mandatory fields in each area of Sumac, and the default values we will use for each when missing from the incoming data.

Lookup Lists: Accounts

Mandatory Field Name	Default Value
Account Code	0
Account Name	[pre-Sumac]

Lookup Lists: Auctions

Mandatory Field Name	Default Value
Start Date	according to dates defaults outlined above
End Date	according to dates defaults outlined above
Description	[pre-Sumac Auction]

Lookup Lists: Skills

Mandatory Field Name	Default Value
Name	[pre-Sumac Skill]
Skill Type	[pre-Sumac]

Lookup Lists: Seat Blocks

Mandatory Field Name	Default Value
Venue	[pre-Sumac Venue]
High Seat Number	1000

Lookup Lists: Price Schemes

Mandatory Field Name	Default Value
Name	[pre-Sumac]
Venue	[pre-Sumac Venue]
Number of Prices	1

Contacts

Mandatory Field Name	Default Value
Last Name	[unknown]

Campaigns

Mandatory Field Name	Default Value
Description	[Pre-Sumac Campaign]
Type	Campaign

Donations

Mandatory Field Name	Default Value
Donor	[unknowndonor]
Payment Type	[pre-Sumac]
When Received	according to dates defaults outlined above
Donation Type	[pre-Sumac]

Funding Programs

Mandatory Field Name	Default Value
Funder	[unknownfunder]
Funding Program Name	[Pre-Sumac Program]

Funding Requests

Mandatory Field Name	Default Value
Funding Program	[Pre-Sumac Program]

Pledges

Mandatory Field Name	Default Value
Contact Making Donation	[unknownpledger]
First Payment Date	Same as Last Payment Date, if known Otherwise, according to dates defaults outlined above
Last Payment Date	Same as First Payment Date, if known Otherwise, according to dates defaults outlined above
Recurring Payment Amount	1
Donation Type	[pre-Sumac]
Payment Type	[pre-Sumac]

Proposals

Mandatory Field Name	Default Value
Contact	[unknown]
Gift Type	[pre-Sumac]
When Proposed	according to dates defaults outlined above

Grant Applications

Mandatory Field Name	Default Value
Grant Application Type	[pre-Sumac]
Grantee	[unknowngrantee]

Communications

Mandatory Field Name	Default Value
Contact	[unknown]
Communication Type	[pre-Sumac]

Events

Mandatory Field Name	Default Value
Event Name	[pre-Sumac Event]
Event Type	[pre-Sumac]
Date	according to dates defaults outlined above
Event Group	[pre-Sumac]
Package	[pre-Sumac]

Lots

Mandatory Field Name	Default Value
Auction	[pre-Sumac]
Donor	[unknownauctiondonor]
Title	[pre-Sumac]

Ticket Orders

Mandatory Field Name	Default Value
Contact	[unknownticketbuyer]
When Ordered	according to dates defaults outlined above
Event	[pre-Sumac Ticketed Event]
Venue	[pre-Sumac Venue]
Seat Block	[pre-Sumac]
Price Scheme	[pre-Sumac]

Invoices

Mandatory Field Name	Default Value
Billing Contact	[unknownbilling]
When Created	according to dates defaults outlined above

Ledger Entries

Mandatory Field Name	Default Value
Contact	[unknown]
Amount	1
When Created	according to dates defaults outlined above

Payments

Mandatory Field Name	Default Value
Contact	[unknownpayer]
When	according to dates defaults outlined above
Payment Type	[pre-Sumac]

Disbursements

Mandatory Field Name	Default Value
Payee	[unknownpayee]
When	according to dates defaults outlined above
Payment Type	[pre-Sumac]
Net Amount	1

Reminders

Mandatory Field Name	Default Value
Contact	[unknown]
Bring Forward Date	according to dates defaults outlined above

Time Dockets

Mandatory Field Name	Default Value
Worker	[unknownworker]
Program	[pre-sumacProgram]
Duration	1
Start Date	Same as End Date, if known Otherwise, according to dates defaults outlined above
End Date	Same as Start Date, if known Otherwise, according to dates defaults outlined above

Job Openings

Mandatory Field Name	Default Value
Hiring Organization	[unknownhiringorg]
Job Title	[pre-Sumac]

Memberships

Mandatory Field Name	Default Value
Member	[unknownmember]
Membership Type	[pre-Sumac Membership]
Start Date	Same as End Date, if known Otherwise, according to dates defaults outlined above
End Date	Same as Start Date, if known Otherwise, according to dates defaults outlined above

Sales

Mandatory Field Name	Default Value
Buyer	[unknownbuyer]
When Ordered	according to dates defaults outlined above

Submissions

Mandatory Field Name	Default Value
Contact	[unknownsubmitter]
Festival	[pre-Sumac]
When Received	according to dates defaults outlined above

Course Registrations

Mandatory Field Name	Default Value
Registrant	[unknownregistrant]
Course Name	[pre-Sumac}
Session Start Date	according to dates defaults outlined above
Session End Date	according to dates defaults outlined above

Tour Booking Programs

Mandatory Field Name	Default Value
Name	[pre-Sumac]

Collection Objects

Mandatory Field Name	Default Value
Object Number	1
Name	[pre-Sumac Object]

Field Details (Maximum Lengths & Data Type)

Maximum Field Length

Every field in Sumac has a set maximum number of characters[*].

If any incoming data exceeds the maximum for its field, we will cut off the text at the maximum and place the original (full) text in the Notes field of the corresponding record.

If the text is too long for the Notes field, we will provide you with an error report that contains the record details, including the full, unimported text.

Note: See Appendix A – Field Definitions for the complete list of fields with maximum character count.

_____

[*]Characters are any letters, numerical digits, symbols (including punctuation marks), and whitespace (spaces between words).

Appendix A – Field Definitions

This appendix provides definitions for the fields in Sumac into which data can be imported.

Appearance in Sumac - Definitions

Checkbox
A single checkbox that, shows that a particular option chosen

Contact
A link to a contact record

Count
A whole number (integer), without decimals

Currency Amount/Decimal Number
A number with two decimal digits

Database Link
A link in a record to a Sumac record elsewhere in the database

Date
A full date, in yyyy-mm-dd format

Drop-down
Allows the user to choose *one* value from a list

Duration
A length of time, shown in hours and minutes

Multiple Checkboxes
Allows the user to choose *several* values from a list

Radio Buttons
A set of options, only one of which can be selected at any time

Text
Allows the user to input text, including alpha numeric and special charachters

Time of Day
A definite time, as shown on a clock

Lookup Lists

Accounts

Field Name	Appearance in Sumac	Maximum Characters
Account Code	text	210
Account Name	text	80
Inactive	checkbox	
Is Debit Account	checkbox	

Action Plans

Field Name	Appearance in Sumac	Maximum Characters
Name	text	60
Description	text	255
Inactive	checkbox	

Action Plan Steps

Field Name	Appearance in Sumac	Maximum Characters
Sequence Number	count	
Step Description	text	60
Objective	text	255
What To Do	text	255
Desired Outcome	text	255
User responsible for this taxt	drop-down	20
Email Subject	text	255
Completion Notes	text	255

Activity Types

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60
Inactive	checkbox	

Adjustment Reasons

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60

Cities

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60

Communication Types

Field Name	Appearance in Sumac	Maximum Characters
Description	text	40
Show as a communication preference in Contact records	checkbox	
Show as a type in Communication records	checkbox	
Do not allow communications of this type to be edited after they are saved	checkbox	
This type of communication is usually sensitive	checkbox	
Show On Web	checkbox	
This is an Ask (in the dashboard ask ratio report)	checkbox	
Not an Ask (in the dashboard ask ratio report)	checkbox	

Field Name	Appearance in Sumac	Maximum Characters
Inactive	checkbox	
Restrict Visibility to Users of this Type ID	drop-down	

Countries

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60

Countact Sources

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60
Show On Web	checkbox	
Inactive	checkbox	

Contact Types

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60
Mandatory Fields	text	255
Inactive	checkbox	
Segments	multiple checkbox	

Courses

Field Name	Appearance in Sumac	Maximum Characters
Course Code	text	40
Course Type Name	multiple checkbox	
Course Name	text	60

Field Name	Appearance in Sumac	Maximum Characters
Notes	text	1024
Facilities Required	text	255
Description	text	8000
Prerequisites	text	60
Grade	text	60
Credits	text	60
Hours	text	60
This is a stream (specialty, course of study)	checkbox	
Do not show on web	checkbox	
Inactive	checkbox	

Course Types

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60
Do not show on web	checkbox	

Discounts

Field Name	Appearance in Sumac	Maximum Characters
Name	text	60
Description	text	150
Inactive	checkbox	
Do not show on web	checkbox	

Field Name	Appearance in Sumac	Maximum Characters
Currency Amount (checked) or Percentage (unchecked)	check	
Discount (% or amount)	currency amount/decimal number	
Contact Type	drop-down	
Account	drop-down	
Code	text	40
Coupon Minimum Tickets	count	
Coupon Maximum Tickets	count	
One coupon per contact	checkbox	
Coupon only applies to base price	checkbox	

Donation Types

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60
Account	drop-down	
Contact Type	drop-down	
Inactive	checkbox	
Automatically set "Will never be receipted" in donations	checkbox	

Event Types

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60

Extra Contact Fields

Field Name	Appearance in Sumac	Maximum Characters
Field in Contact Record	drop-down	
Name in Dialogs	text	80
Name in Templates	text	20
Dialog Tab Name	text	20
Entry Order	count	
Data Type	drop-down	
Value List: separated by ;	text	255
Checkboxes per row	count	
Visible only to users who can see sensitive data	checkbox	
This is a password, so obscure it during entry	checkbox	
Add a button to assign a sequence number in this field	checkbox	
Header Text	text	60
Segment	multiple checkbox	

Fiscal Years

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60

Funds

Field Name	Appearance in Sumac	Maximum Characters
Name	text	40

Field Name	Appearance in Sumac	Maximum Characters
Description	text	200
Fund Code	text	40
Fund Type	drop-down	
Account ID 1	drop-down	
Account ID 2	drop-down	
Percentage to First Account	currency amount/decimal number	
Inactive	checkbox	
Show On Web	checkbox	
Sequence On Website	count	
Show only on these websites	text	255
Search terms	text	255

Fund Types

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60

Funder Request Statuses

Field Name	Appearance in Sumac	Maximum Characters
Description	text	40

GYO (Custom & Case Management) Field Definitions

Field Name	Appearance in Sumac	Maximum Characters
Record Type Name	drop-down	

Field Name	Appearance in Sumac	Maximum Characters
Internal Field Name	drop-down	
Visible Name	text	510
Default Schema	text	80
Formula or Checkbox Choices	text	510
Visibility Formula	text	510
Entry Order Number	count	
Mandatory	checkbox	
This Field is an Alert	checkbox	
This Field is Sensitive	checkbox	
Do not show on web	checkbox	
Display as time of day	checkbox	
Display as duration	checkbox	
Enforce unique record values for this field number	checkbox	
Allow formatted text	checkbox	
Show text as file attachment	checkbox	
Show text as checkbox group	checkbox	
Hide the text field in a checkbox group	checkbox	
Checkboxes per row	count	
Order In Record Summary	count	

Field Name	Appearance in Sumac	Maximum Characters
Name of Dialog Tab For This Field	text	60
Variable Name in another record type	text	80
Maximum characters allowed on website	count	

Grow-Your-Own Lookups (28 Lookups)

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60
Inactive	checkbox	

Grow-Your-Own Relations

Field Name	Appearance in Sumac	Maximum Characters
Parent	database link	
Child	database link	
Notes	text	255

Industries

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60

Languages

Field Name	Appearance in Sumac	Maximum Characters
Description	text	40

Marital Statuses

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60

Media

Field Name	Appearance in Sumac	Maximum Characters
Description	text	40

Membership Types

Field Name	Appearance in Sumac	Maximum Characters
Name	text	255
Description (appears on web)	text	255
Number of Membership Cards	count	
Number of grace days after expiry	count	
When no longer available	date	
Default Start Date	date	
Default Expiry Date	date	
Duration (months)	count	
Annual Fee	currency amount/decimal number	
Required Donation Amount	currency amount/decimal number	
Credit Account	drop-down	
Let user choose surcharge 1	checkbox	
Let user choose surcharge 2	checkbox	
Do not show on web	checkbox	
Inactive	checkbox	

Payment Purposes

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60

Payment Types

Field Name	Appearance in Sumac	Maximum Characters
Description	text	20
Is Bank Transfer	checkbox	
Is Credit Card Number	checkbox	
Is Cheque	checkbox	
Digit Count	count	
Do Not validate using Luhn algorithm	checkbox	
Inactive	checkbox	
Do not show on web	checkbox	
Insert spaces every four digits	checkbox	
Round amounts in accordance with Preferences	checkbox	
Automatically set "Will never be receipted" in donations	checkbox	
Payment Processor Code	text	20
Account	drop-down	

Prefixes

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60

Field Name	Appearance in Sumac	Maximum Characters
Include in Membership Directory	checkbox	

Price Schemes

Field Name	Appearance in Sumac	Maximum Characters
Name	text	60
Description	text	150
Venue	drop-down	
Number of Prices	count	
Base Price	currency amount/decimal number	
Donation	currency amount/decimal number	
Donation amount is a percentage number	checkbox	
Discount	drop-down	
Discount 2	drop-down	
Discount 3	drop-down	
Discount 4	drop-down	
Discount 5	drop-down	
Discount 6	drop-down	
Discount 7	drop-down	
Discount 8	drop-down	
Discount 9	drop-down	

Field Name	Appearance in Sumac	Maximum Characters
Discount 10	drop-down	
Discount 11	drop-down	
Discount 12	drop-down	
Discount 13	drop-down	
Discount 14	drop-down	
Discount 15	drop-down	
Discount 16	drop-down	
Surcharge	drop-down	
Surcharge 2	drop-down	
Surcharge 3	drop-down	
Surcharge 4	drop-down	
Surcharge 5	drop-down	
Surcharge 6	drop-down	
Surcharge 7	drop-down	
Surcharge 8	drop-down	
Discount 1 Override Price	currency amount/decimal number	
Discount 2 Override Price	currency amount/decimal number	
Discount 3 Override Price	currency amount/decimal number	

Field Name	Appearance in Sumac	Maximum Characters
Discount 4 Override Price	currency amount/decimal number	
Discount 5 Override Price	currency amount/decimal number	
Discount 6 Override Price	currency amount/decimal number	
Discount 7 Override Price	currency amount/decimal number	
Discount 8 Override Price	currency amount/decimal number	
Discount 9 Override Price	currency amount/decimal number	
Discount 10 Override Price	currency amount/decimal number	
Discount 11 Override Price	currency amount/decimal number	
Discount 12 Override Price	currency amount/decimal number	
Discount 13 Override Price	currency amount/decimal number	
Discount 14 Override Price	currency amount/decimal number	
Discount 15 Override Price	currency amount/decimal number	
Discount 16 Override Price	currency amount/decimal number	

Products

Field Name	Appearance in Sumac	Maximum Characters
Product Name	text	40
SKU	text	255
Description	text	150
Cost	currency amount/decimal number	
Account	drop-down	
Base Price	currency amount/decimal number	
Account 2	drop-down	
Portion of price allocated to Account 2	currency amount/decimal number	
Discount 1	drop-down	
Discount 2	drop-down	
Discount 3	drop-down	
Discount 4	drop-down	
Discount 5	drop-down	
Surcharge Type 1	drop-down	
Surcharge Type 2	drop-down	
Surcharge Type 3	drop-down	
Surcharge Type 4	drop-down	
Volume	text	10

Field Name	Appearance in Sumac	Maximum Characters
Number	text	10
ISBN	text	100
Printing	text	10
Authors	text	255
When Published	date	
Historical Quantity On Hand	count	
Inactive	checkbox	
Use for Sales	checkbox	
Use for Course Registrations	checkbox	

Product Inventories

Field Name	Appearance in Sumac	Maximum Characters
Product	database link	
Quantity: (+)Added (-)Deducted	count	
Contact	contact	
Transaction Date	date	
Notes	text	255

Programs

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60
Departments	multiple checkboxes	

Provinces

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60

Relation Types

Field Name	Appearance in Sumac	Maximum Characters
Forward	text	40
Reverse	text	40
Sensitive	checkbox	

Schema Entries

Field Name	Appearance in Sumac	Maximum Characters
Schema	drop-down	
Term	text	150
Usage	text	255
User Type	multiple checkbox	
Inactive	checkbox	

Schools

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60

Seasons

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60

Seat Blocks

Field Name	Appearance in Sumac	Maximum Characters
Venue	drop-down	
Description	text	40
Reverse Order of Seat Numbering	checkbox	
Seats Face Inward	checkbox	
Inactive	checkbox	
Odd-numbered Seats Only	checkbox	
Even-numbered Seats Only	checkbox	
Do not show on web	checkbox	
First Prefix (Section)	text	10
Second Prefix	text	10
Unusable seats at low end	count	
Low Seat Number	count	
High Seat Number	count	
Unusable seats at high end	count	
Low Seat's Weight	count	
High Seat's Weight	count	
Mid Seat Number	count	
Mid Seat's Weight	count	

Sessions

Field Name	Appearance in Sumac	Maximum Characters
Course	database link	
Session Code	text	20
Location	text	60
Notes	text	1024
Course List URL	text	255
Session Start Date	date	
Session End Date	date	
Session Start Time	time of day	
Session End Time	time of day	
Registration Start Date	date	
Registration Start Time	time of day	
Registration End Date	date	
Registration End Time	time of day	
Minimum Students (Internal)	count	
Maximum Students (Internal)	count	
Maximum Students (Web)	count	
Locked/Inactive	checkbox	
Stream Registration Required	checkbox	
External Funding Needed	checkbox	

Field Name	Appearance in Sumac	Maximum Characters
Do not show on web	checkbox	
Apply discount A	checkbox	
Apply discount B	checkbox	
Free to members	checkbox	
Only for current members	checkbox	
Specific Member Type	drop-down	
Check payer's Membership	checkbox	
Check registrant's Membership	checkbox	
Total Fee	currency amount/decimal number	
Minimum Deposit	currency amount/decimal number	
Account	drop-down	
Budgeted Students	count	
Actual Students	count	
Budgeted Class Time	count	
Actual Class Time	count	

Supplementary Items

Field Name	Appearance in Sumac	Maximum Characters
Session	database link	
Product	database link	

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60
Website Question	text	60
Mandatory	checkbox	
Account	drop-down	

Skills

Field Name	Appearance in Sumac	Maximum Characters
Name	text	60
Description	text	255
Skill Type	drop-down	
Show on web	checkbox	

Skill Types

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60

Task Types

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60
Task Type Parent	drop-down	
Departments	multiple checkbox	
Do not allow users to select this task type	checkbox	

Time Zones

Field Name	Appearance in Sumac	Maximum Characters
Description	text	20
GMT Offset (hours)	currency amount/decimal number	

Venues

Field Name	Appearance in Sumac	Maximum Characters
Name	text	50
Address	text	200
Telephone	text	20
Venue's Website	text	150
Directions	text	150
URL of Seating Plan	text	150
Inactive	checkbox	

Volunteer Types

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60

Sumac Records

Auctions

Field Name	Appearance in Sumac	Maximum Characters
Start Date	date	
End Date	date	
End Time	time of day	

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60
Event	database link	
Total Proceeds	c urrency amount	
Assign lot numbers automatically	checkbox	
On entry, set the artist the same as the donor	checkbox	

Campaigns

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60
Inactive	checkbox	
Type	drop-down	
Account	drop-down	
Parents	text	60
Start Date	date	
End Date	date	
Revenue Target	currency amount/decimal number	
Cost: List Rental	currency amount/decimal number	
Cost: Data Processing	currency amount/decimal number	
Cost: Production	currency amount/decimal number	

Field Name	Appearance in Sumac	Maximum Characters
Cost: Postage	currency amount/decimal number	
Cost: Other	currency amount/decimal number	
# Communications Distributed	count	
Group	drop-down	
Use all contacts in my parent	checkbox	
Finalized	checkbox	
When Sent	date	
Source Code	text	20
Notes	text	255

Classes

Field Name	Appearance in Sumac	Maximum Characters
Notes	text	60
Description	text	80
Where	text	80
When	date	
Start Time	time of day	
End Time	time of day	
Class Teacher 1	contact	
Class Teacher 2	contact	

Field Name	Appearance in Sumac	Maximum Characters
Session	database link	

Class Attendances

Field Name	Appearance in Sumac	Maximum Characters
Student	contact	
Class	database link	
Attendance Status	drop-down menu	
Notes	text	255

Collection Objects

Field Name	Appearance in Sumac	Maximum Characters
Created By	text	50
When Created	date	
Is template	checkbox	
Object Number	text	50
Old/Other Object Number	text	50
Acquisition Status	drop-down	
Name	text	150
Other (Common) Name	text	150
Description	text	2000
Subject	text	255
Title	text	255

Field Name	Appearance in Sumac	Maximum Characters
Gender	drop-down	
Pattern/Model	text	255
Collection	drop-down	
Collection 2	drop-down	
Deaccession Date	date	
Owner	contact	
Set/Group Type	drop-down	
Set/Group Part Count	count	
Set/Group Description	text	2000
Notes (complete)	text	2000
Curatorial Note Type	drop-down	
Curatorial Note	text	255
Curatorial Summary	text	255
Provenance Type	drop-down	
Provenance When	date	
Provenance Donor	contact	
Provenance Creator	contact	
Provenance Notes	text	5000
Provenance Low Date	text	50
Provenance High Date	text	50

Field Name	Appearance in Sumac	Maximum Characters
Provenance Consideration Received	text	255
Provenance Authority	text	255
Physical Material	text	60
Physical Colour	text	60
Physical Technique	text	60
Physical Source	text	255
Physical Notes	text	255
Media File Type	drop-down	
Media Content Type	drop-down	
Media File System Path	text	255
Media Description	text	255
Media Notes	text	255
Numerical Measured Attribute	drop-down	
Numerical Unit of Measurement	drop-down	
Numerical Measurement	text	255
Numerical Notes	text	255
Location Low Date	text	255
Location High Date	text	255
Location Type	drop-down	
Location Notes	text	255

Field Name	Appearance in Sumac	Maximum Characters
Location Box	text	255
Location Shelf	text	255
Conservation Low Date	text	255
Conservation High Date	text	255
Conservation Condition Before	text	255
Conservation Notes	text	255
Insurance Action Type	drop-down	
Insurance Value	currency amount/decimal number	

Communications

Field Name	Appearance in Sumac	Maximum Characters
Communication Type	drop-down	
Event	database link	
Campaign	database link	
Source	drop-down	
Date	date	
Notes (complete)	text	8192
Attached File	text	255
Sensitive	checkbox	

Contacts

Field Name	Appearance in Sumac	Maximum Characters
Prefix	text	25
First Name	text	80
Middle Name	text	25
Last Name	text	180
Suffix	text	20
Birthday	date	
Gender	drop-down	
Segment Name	drop-down	
Deceased	checkbox	
Moved	checkbox	
Sensitive	checkbox	
Inactive	checkbox	
User Type	drop-down	
Renewal:	date	
Originally Entered	date	
Letter Salutation	text	40
Informal Salutation	text	60
Contact Source	drop-down	
Time Zone	drop-down	

Field Name	Appearance in Sumac	Maximum Characters
Marital Status	drop-down	
Language	drop-down	
Language 2	drop-down	
Annual Receipt	checkbox	
Not Receiptable	checkbox	
Recognition for Donationst	text	150
Notes	text	510
Alert	text	255
Volunteer Types	multiple checkbox	
Contact Types	multiple checkbox	
Communication Preferences	multiple checkbox	
Use Residence Email 1	checkbox	
Use Residence Email 2	checkbox	
Use Business Email 1	checkbox	
Use Business Email 2	checkbox	
Use Assistant Email	checkbox	
Use Vacation Email	checkbox	
Residence Recipient	text	80
Residence Street A	text	255
Residence Apartment	text	10

Field Name	Appearance in Sumac	Maximum Characters
Residence Street B	text	255
Residence State		
Residence City	text	50
Residence Country	text	50
Residence Postal Code	text	50
Residence Phone	text	30
Residence Phone Extension	text	20
Residence Phone 2	text	30
Residence Phone Extension	text	20
Residence Cell Phone	text	30
Residence Fax	text	30
Residence Email	text	80
Residence Email 2	text	80
Residence Website	text	150
Business Recipient	text	80
Business Title	text	100
Business Department	text	120
Business Organization	text	180
Business Street A	text	255
Business Suite	text	10

Field Name	Appearance in Sumac	Maximum Characters
Business Street B	text	255
Business State		
Business City	text	50
Business Country	text	50
Business Postal Code	text	50
Business Phone	text	30
Business Phone Extension	text	20
Business Phone 2	text	30
Business Phone Extension	text	20
Business Cell Phone	text	30
Business Fax	text	30
Business Fax 2	text	30
Business Email	text	80
Business Email 2	text	80
Business Website	text	150
Use Business Address	checkbox	
Assistant Name	text	40
Assistant Phone	text	30
Assistant Fax	text	30
Assistant Email	text	80

Field Name	Appearance in Sumac	Maximum Characters
Vacation Recipient	text	80
Vacation Street A	text	255
Vacation Apartment	text	10
Vacation Street B	text	255
Vacation City	text	50
Vacation State	text	50
Vacation Country	text	50
Vacation Postal Code	text	50
Vacation Phone	text	30
Vacation Phone Extension	text	20
Vacation Cell Phone	text	30
Vacation Fax	text	30
Vacation Email	text	80
Vacation Effectivity Start Date	date	
Vacation Effectivity End Date	date	
Use Vacation Dates in Future	checkbox	
Fu nder Type	drop-down	
Funder Fiscal Year Start	date	
Funder Fiscal Year End	date	
Funder Assets	text	150

Field Name	Appearance in Sumac	Maximum Characters
Funder Notes	text	150
Funder Board	text	255
Funder Annual Distributions Number	currency amount/decimal number	
Member Directory Title	text	100
Member Directory Phone	text	20
Member Directory Extension	text	20
Member Directory Email	text	80
Include in Member Directory	checkbox	
Portrait Location	text	255
File Number Text	text	255
Extra fields	text (can be shown as text, date, number, checkbox, drop-down, formula, Luhn Validated, multiple checkbox)	255

Course Registrations

Field Name	Appearance in Sumac	Maximum Characters
Notes	text	255
Billing Contact	contact	
Registrant	contact	
Student (if different)	text	60
Student count	count	

Field Name	Appearance in Sumac	Maximum Characters
Contact 3	contact	
Why taking course	text	255
Registration Date	date	
Fee	currency amount/decimal number	
Promo Code	drop-down	
Promo Amount	currency amount/decimal number	
Discount	drop-down	
Discount Amount	currency amount/decimal number	
Surcharge	drop-down	
Surcharge Amount	currency amount/decimal number	
Supplementary Items Amount	currency amount/decimal number	
Total Amount	currency amount/decimal number	
Funding Source	drop-down	
Account	drop-down	
Paid In Full	checkbox	
Initial Status	drop-down	
Final Status	drop-down	

Field Name	Appearance in Sumac	Maximum Characters
Final Status Date	date	
Is a Stream	checkbox	
Amount Paid	currency amount/decimal number	
Session	database link	

Supplementary Items

Field Name	Appearance in Sumac	Maximum Characters
Registration ID	database link	
Supplementary Item	database link	
Product	database link	
Quantity	count	
Unit Price	currency amount/decimal number	
Surcharge 1 Type	drop-down	
Surcharge 1 Amount	currency amount/decimal number	
Surcharge 2 Type	drop-down	
Surcharge 2 Amount	currency amount/decimal number	
Total	currency amount/decimal number	
Date	date	
Notes	text	255

Donations

Field Name	Appearance in Sumac	Maximum Characters
In Honour Note	text	255
Send Recognition Note	text	255
Recognition has been sent	checkbox	
Campaign	database link	
Donation Type	drop-down	
Fund	drop-down	
Account	drop-down	
Event	database link	
Payment Type	drop-down	
When Received	date	
Cheque Number	count	
Cheque Date	date	
Total Amount	currency amount/decimal number	
Receiptable Amount	currency amount/decimal number	
Donor Recognition	text	150
Reconciled	checkbox	
Acknowledged	checkbox	
Notes	text	255

Field Name	Appearance in Sumac	Maximum Characters
Tax Receipt Number	count	
Will never be receipted	checkbox	
When Receipt Was Issued	date	
Cancelled Receipt	checkbox	
External Tax Receipt Number	text	40
Pledge	database link	
Soft Credit Amount	currency amount/decimal number	
Matching Expected Amount	currency amount/decimal number	
Matching Expected Date	date	
Matching Received Amount	currency amount/decimal number	
Matching Received Date	date	
Donor's paper-work is good	checkbox	
Submitted paper-work	checkbox	
Payment Notes	text	255
Payment Purpose Name	drop-down	
Payment Type Name	drop-down	
Payment Processed	checkbox	
Influencer IDs	database link	

Donation Batches

Field Name	Appearance in Sumac	Maximum Characters
Donation Batch Name	text	60
Notes	text	255
When Deposited	date	
Deposited Amount	currency amount/decimal number	
Inactive	checkbox	

Events

Field Name	Appearance in Sumac	Maximum Characters
Event Name	text	80
Description	text	100
Name on Web	text	255
Venue	drop-down	
Account	drop-down	
Event Type	drop-down	
Campaign	database link	
Max Tickets/Contact	count	
Date	date	
End Date	date	
Time	text	40
Ticket Sales Start On	date	

Field Name	Appearance in Sumac	Maximum Characters
Ticket Sales End (Date)	date	
Ticket Sales End (Time)	time of day	
Price Scheme	drop-down	
Inactive	checkbox	
Do not show on web	checkbox	
Don't show unsold seat count on web	checkbox	
Sold Out	checkbox	
Cancelled	checkbox	
Revenue (A)	currency amount/decimal number	
Revenue (B)	currency amount/decimal number	
Revenue (C)	currency amount/decimal number	
Revenue (D)	currency amount/decimal number	
Revenue (E)	currency amount/decimal number	
Expense (A)	currency amount/decimal number	
Expense (B)	currency amount/decimal number	
Expense (C)	currency amount/decimal number	

Field Name	Appearance in Sumac	Maximum Characters
Expense (D)	currency amount/decimal number	
Expense (E)	currency amount/decimal number	
Reconciled	checkbox	
Segment	drop-down	
Internal Description	text	4095
Coupon	drop-down	
Coupon 2	drop-down	
Coupon 3	drop-down	
Coupon 4	drop-down	

Event Groups

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60
Season	drop-down	
Notes	text	255
Inactive	checkbox	
Show this group on website	checkbox	
Event List URL	text	255
Web Grouping	drop-down	
Sequence on Website	count	

Event Group Events

Field Name	Appearance in Sumac	Maximum Characters
Event Group Name	database link	
Event Name	database link	

Event Packages

Field Name	Appearance in Sumac	Maximum Characters
Description	text	60
Season	drop-down	
Account	drop-down	
Notes	text	255
#Packages to Sell	count	
Maximum Ticket Units Allowed	count	
Discount 1 (Base)	drop-down	
Discount 1 (Base) Price	currency amount/decimal number	
Discount 2 (Base)	drop-down	
Discount 2 (Base) Price	currency amount/decimal number	
Discount 3 (Base)	drop-down	
Discount 3 (Base) Price	currency amount/decimal number	
Discount 4 (Base)	drop-down	
Discount 4 (Base) Price	currency amount/decimal number	

Field Name	Appearance in Sumac	Maximum Characters
Discount 5 (Base)	drop-down	
Discount 5 (Base) Price	currency amount/decimal number	
Discount 6 (Base)	drop-down	
Discount 6 (Base) Price	currency amount/decimal number	
Discount 7 (Base)	drop-down	
Discount 7 (Base) Price	currency amount/decimal number	
Discount 8 (Base)	drop-down	
Discount 8 (Base) Price	currency amount/decimal number	
Discount 9 (Base)	drop-down	
Discount 9 (Base) Price	currency amount/decimal number	
Discount 10 (Base)	drop-down	
Discount 10 (Base) Price	currency amount/decimal number	
Surcharge	currency amount/decimal number	
Surcharge	currency amount/decimal number	
Surcharge	currency amount/decimal number	
Surcharge	currency amount/decimal number	

Field Name	Appearance in Sumac	Maximum Characters
Inactive	checkbox	
Show On Web	checkbox	

Facts

Field Name	Appearance in Sumac	Maximum Characters
Fact Type	database link	
Notes	text	1020
When Updated	date	
Updated By	text	20
String A	text	255
String B	text	255
Currency	currency amount/decimal number	
Number A	count	
Number B	count	
Number C	count	
Date A	date	
Date B	date	
Time A	time of day	
Time B	time of day	
Day of Week	multiple checkbox	
Lookup List	drop-down	

Exam Marks

Field Name	Appearance in Sumac	Maximum Characters
Exam Mark	text	10
Notes (complete)	255	
Session	database link	
Exam Date	date	

Extra Contact Fields

Field Name	Appearance in Sumac	Maximum Characters
Field in Contact Record	drop-down	
Name in Dialogs	text	80
Name in Templates	text	20
Dialog Tab Name	text	20
Entry Order	count	
Data Type	drop-down	
Value List: separated by ;	text	255
Checkboxes per row	count	
Visible only to users who can see sensitive data	checkbox	
This is a password, so obscure it during entry	checkbox	
Add a button to assign a sequence number in this field	checkbox	
Header Text	text	60

Field Name	Appearance in Sumac	Maximum Characters
Segment	multiple checkbox	

Funding Programs

Field Name	Appearance in Sumac	Maximum Characters
Funder	contact	
Funder Solicitor 1	contact	
Apply To	contact	
Funding Program Name	text	255
Objective	text	255
Geography	text	255
Past Recipients	text	255
Funds What	text	255
Active	checkbox	
Active Notes	text	255
Annual Distribution	currency amount/decimal number	
Grant Size Minimum	currency amount/decimal number	
Grant Size Maximum	currency amount/decimal number	
Deadlines	text	255
Notes	text	255
Applicable	checkbox	

Field Name	Appearance in Sumac	Maximum Characters
Action Plan	drop-down	

Funder Requests

Field Name	Appearance in Sumac	Maximum Characters
Funder Solicitor 1	contact	
Funder Solicitor 2	contact	
Funder Solicitor 3	contact	
Funder Partner 1	contact	
Funder Partner 2	contact	
Funding Program	database link	
Funder Request Status	drop-down	
When Application Due	date	
When Started	date	
Requirements	text	255
Requested Amount	currency amount/decimal number	
When Funding Begins	date	
When Fund Ends	date	
Fiscal Year	drop-down	
When Report Due (1)	date	
When Report Due (2)	date	
When Report Due (3)	date	

Field Name	Appearance in Sumac	Maximum Characters
When Report Due (4)	date	
When Report Due (5)	date	
When Report Due (6)	date	
Reporting Forms Received	checkbox	
Reporting Notes	text	255
How to Acknowledge Funder	text	255
Disposition Notes	text	255
Attached File	text	255

Grant Applications

Field Name	Appearance in Sumac	Maximum Characters
Grantee	contact	
Description	text	200
Application Type	drop-down	
Grant Application Status	drop-down	
Funder Request Status	drop-down	
Review Due Date	date	
When Submitted	date	
When Accepted/Rejected	date	
When Closed	date	
Requested Amount	currency amount/decimal number	

Field Name	Appearance in Sumac	Maximum Characters
Amount Granted	currency amount/decimal number	
Overall Rank (Total)	count	
Application Finalized	checkbox	
Report Finalized	checkbox	
Reviewer 1	contact	
Review 1 Finalized	checkbox	
Review 1 Rank	count	
Reviewer 2	contact	
Review 2 Finalized	checkbox	
Review 2 Rank	count	
Reviewer 3	contact	
Review 3 Finalized	checkbox	
Review 3 Rank	count	
Reviewer 4	contact	
Review 4 Finalized	checkbox	
Review 4 Rank	count	
Application Notes	text	255
Review Notes	text	255

Invoices

Field Name	Appearance in Sumac	Maximum Characters
Billing Contact	contact	
Paying for Contact	contact	
When Created	date	
Event	database link	
Fee 1 Amount	currency amount/decimal number	
Fee 1 Description	text	255
Fee 1 Account	drop-down	
Fee 2 Amount	currency amount/decimal number	
Fee 2 Description	text	255
Fee 2 Account	drop-down	
Fee 3 Amount	currency amount/decimal number	
Fee 3 Description	text	255
Fee 3 Account	drop-down	
Fee 4 Amount	currency amount/decimal number	
Fee 4 Description	text	255
Fee 4 Account	drop-down	
Fee 5 Amount	currency amount/decimal number	

Field Name	Appearance in Sumac	Maximum Characters
Fee 5 Description	text	255
Fee 5 Account	drop-down	
Fee 6 Amount	currency amount/decimal number	
Fee 6 Description	text	255
Fee 6 Account	drop-down	
Discount	drop-down	
Discount Amount	currency amount/decimal number	
Surcharge 1	drop-down	
Surcharge 1 Amount	currency amount/decimal number	
Surcharge 2	drop-down	
Surcharge 2 Amount	currency amount/decimal number	
Total	currency amount/decimal number	
When Paid	date	
Exported	checkbox	
Notes	text	255
Preferred Payment Type	drop-down	
Payment Amount	currency amount/decimal number	

Field Name	Appearance in Sumac	Maximum Characters
Payment Date	date	
Payment Type	drop-down	

Job Openings

Field Name	Appearance in Sumac	Maximum Characters
Job Opening Status	drop-down	
Notes	text	255
Department	text	100
Industry	drop-down	
Order Number	text	30
Position Count	count	
Job Title	text	100
Duties	text	255
Permanent	checkbox	
Temporart	checkbox	
Maybe Permanent	checkbox	
Full Time	checkbox	
Part Time	checkbox	
Shift	checkbox	
Hours	text	100
Start Date	date	

Field Name	Appearance in Sumac	Maximum Characters
End Date	date	
Location text	text	100
Transit Accessible	text	100
Pay Rate	currency amount/decimal number	
Pay Timeframe	drop-down	
Benefits	text	255

Lots

Field Name	Appearance in Sumac	Maximum Characters
Auction	drop-down	
Lot Number	text	8
Secondary Lot Number	text	8
Contract Number	text	8
Title	text	255
Description	text	2000
Auction Category	drop-down	
Medium	drop-down	
Minimum Bid	currency amount/decimal number	
Insurance Value	currency amount/decimal number	

Field Name	Appearance in Sumac	Maximum Characters
Percent to Donor	currency amount/decimal number	
Height	currency amount/decimal number	
Width	currency amount/decimal number	
Depth	currency amount/decimal number	
Weight	currency amount/decimal number	
When Received	date	
Sold Price	currency amount/decimal number	
Account	drop-down	
Receipt Number	text	20
Payment to Donor	currency amount/decimal number	
Receipt to Donor	currency amount/decimal number	
Unsold Disposition	drop-down	
Notes	text	255
Donation Recorded	checkbox	
Thumbnail Location	text	255
Artist	contact	
Appraiser	contact	

Field Name	Appearance in Sumac	Maximum Characters
Extra Flag 1	checkbox	
Extra Flag 2	checkbox	
Extra Flag 3	checkbox	
Extra Flag 4	checkbox	
Extra Amount 1	currency amount/decimal number	
Extra Amount 2	currency amount/decimal number	
Extra Amount 3	currency amount/decimal number	
Extra Amount 4	currency amount/decimal number	
Extra Count 1	count	
Extra Count 2	count	
Extra Count 3	count	
Extra Count 4	count	

Memberships

Field Name	Appearance in Sumac	Maximum Characters
Gift Membership	checkbox	
Membership Type	drop-down	
Start Date	date	
End Date	date	

Field Name	Appearance in Sumac	Maximum Characters
Payment Date	date	
Fee	currency amount/decimal number	
Surcharge 1	currency amount/decimal number	
Surcharge 2	currency amount/decimal number	
Donation	currency amount/decimal number	
Extra Currency Field 1	currency amount/decimal number	
Extra Currency Field 2	currency amount/decimal number	
Payment Type	drop-down	
Source	drop-down	
Notes	text	255
Account 1	drop-down	
Account Amount 1	currency amount/decimal number	
Account 2	drop-down	
Account Amount 2	currency amount/decimal number	
Account 3	drop-down	
Account Amount 3	currency	

Membership Directory Entries

Field Name	Appearance in Sumac	Maximum Characters
Membership Directory Template	drop-down	
Repetition	count	
Title	text	255
Content	text	2000

Payment Allocations

Field Name	Appearance in Sumac	Maximum Characters
Payment ID	database link	
Allocated Amount	currency amount/decimal number	
Date	date	
Notes	text	255

Payments

Field Name	Appearance in Sumac	Maximum Characters
When	date	
Total	currency amount/decimal number	
Notes	text	255
Campaign	database link	
Account	drop-down	
Payment Type	drop-down	
Cheque Number	text	20

Field Name	Appearance in Sumac	Maximum Characters
Cheque Date	date	
CC Number	text	24
CC Expiry Month	count	
CC Expiry Year	count	
CC Name	text	60
Bank Account	text	20
Bank Name	text	60
Bank Phone	text	20
Authorization Code	text	100
Payment Processing Error	text	255
Processed	checkbox	
Reconciled	checkbox	
Is Saving Account	checkbox	
Payment Batch	database link	

Pledges

Field Name	Appearance in Sumac	Maximum Characters
Frequency (months)	count	
Day of Month	count	
First Payment Date	date	
Last Payment Date	date	

Field Name	Appearance in Sumac	Maximum Characters
Recurring Payment Amount	currency amount/decimal number	
Irregular Payments	checkbox	
Notes	text	255
Pledge Status	drop-down	
Account	drop-down	
Event	database link	
Donation Type	drop-down	
Fund	database link	
Campaign	database link	
Payment Type	drop-down	
Bank Number-Bank Transit	text	20
Bank Account	text	20
Bank Name	text	60
Bank Phone	text	20
Payment Purpose	drop-down	
Payment Account	drop-down	

Proposals

Field Name	Appearance in Sumac	Maximum Characters
Gift Type	drop-down	
When Proposed	date	

Field Name	Appearance in Sumac	Maximum Characters
Notes	text	150

Relations

Field Name	Appearance in Sumac	Maximum Characters
Contact A	contact	
Contact B	contact	
Relation Type	drop-down	
Notes	text	255

Reminders

Field Name	Appearance in Sumac	Maximum Characters
Flag	checkbox	
Action Plan	drop-down	
What to Do	text	510
Notes	text	510
Bring Forward Date	date	
Start Time	time of day	
End Time	time of day	
Panned completion date	date	
Priority	drop-down	
Action Type	drop-down	
Status	drop-down	

Field Name	Appearance in Sumac	Maximum Characters
Assigned User	drop-down	
Event	database link	
Campaign	database link	
Completed	checkbox	
Actual Completion Date	date	
Location	text	255
Show steps as checklist	checkbox	
Reminder Warning Time	count	
Reminder Warning Type	radio buttons	
Email Address to Send Reminder	text	80

Sales

Field Name	Appearance in Sumac	Maximum Characters
Source	drop-down	
When Ordered	date	
When Shipped	date	
Event	database link	
Product Amount	currency amount/decimal number	
Surcharge Type 1	drop-down	
Surcharge Amount 1	currency amount/decimal number	

Field Name	Appearance in Sumac	Maximum Characters
Surcharge Type 2	drop-down	
Surcharge Amount 2	currency amount/decimal number	
Surcharge Type 3	drop-down	
Surcharge Amount 3	currency amount/decimal number	
Surcharge Type 4	drop-down	
Surcharge Amount 4	currency amount/decimal number	
Adjustment Reason	text	40
Adjustment Amount	currency amount/decimal number	
Donation	currency amount/decimal number	
Delivery Method	drop-down	
Order Paid	checkbox	
Notes	text	255
Shipper Reference	text	50
Shipper Note	text	255
Product	list	
Product Quantity	count	
Payment Date	date	
Payment Notes	text	255

Field Name	Appearance in Sumac	Maximum Characters
Payment Purpose	drop-down	
Payment Type	drop-down	
Payment Processed	checkbox	

Submissions

Field Name	Appearance in Sumac	Maximum Characters
Festival	drop-down	
Discipline	drop-down	
Medium	drop-down	
Status	drop-down	
Selected	checkbox	
Running Time	duration	
Notes	text	255
Technical Notes	text	255
Male Performers	count	
Female Performers	count	
Need Musicians	checkbox	

Tasks

Field Name	Appearance in Sumac	Maximum Characters
Task Template	checkbox	
Department	checkbox	

Field Name	Appearance in Sumac	Maximum Characters
Program	drop-down	
Task Type	database link	
Event	database link	
Location	text	100
Description	text	60
Notes	text	255
Start Date	date	
Start Time	time of day	
Start Time 2	time of day	
End Time	time of day	
Duration	duration	
Assignment Status	drop-down	
# Clients	count	
# Services	count	
# Units	count	
Assignment	text	255
End Date	date	
Completion Notes	text	255
Skills	database link	

Task Types

Field Name	Appearance in Sumac	Maximum Characters
Contact	contact	
Source	drop-down	
When Ordered	date	
When Printed	date	
Ticket Amount	currency amount/decimal number	
Surcharge Type 1	drop-down	
Surcharge Amount 1	currency amount/decimal number	
Surcharge Type 2	drop-down	
Surcharge Amount 2	currency amount/decimal number	
Surcharge Type 3	drop-down	
Surcharge Amount 3	currency amount/decimal number	
Surcharge Type 4	drop-down	
Surcharge Amount 5	currency amount/decimal number	
Coupon 1	drop-down	
Coupon 1 Amount	currency amount/decimal number	
Coupon 2	drop-down	

Field Name	Appearance in Sumac	Maximum Characters
Coupon 2 Amount	currency amount/decimal number	
Coupon 3	drop-down	
Coupon 3 Amount	currency amount/decimal number	
Coupon 4	drop-down	
Coupon 4 Amount	currency amount/decimal number	
Adjustment Reason	drop-down	
Adjustment Amount	currency amount/decimal number	
Donation	currency amount/decimal number	
Account	drop-down	
Delivery Method	drop-down	
Order Paid	checkbox	
Notes	text	250
House Notes	text	250
Shipper Reference	text	50
Shipper Note	text	255
Payment Type	drop-down	
Payment Date	date	

Field Name	Appearance in Sumac	Maximum Characters
Payment Amount	currency amount/decimal number	
Event	data link	
Low Ticket Number	database link	
High Ticket Number	database link	
Package Name	database link	
Subscription Discount Name	database link	
Package Quantity	database link	
Ticket Details	database link	

Time Dockets

Field Name	Appearance in Sumac	Maximum Characters
Worker Count	count	
Department	drop-down	
Task Type	drop-down	
Activity Type	drop-down	
Event	database link	
Start Time	time of day	
End Time	time of day	
Duration	duration	
Start Date	date	
End Date	date	

Field Name	Appearance in Sumac	Maximum Characters
Disbursement	currency amount/decimal number	
Notes	text	8000

Programs (Tour Bookings)

Field Name	Appearance in Sumac	Maximum Characters
Name	text	255
Description	text	255
Notes	text	255
Theme	drop-down	
Discipline	drop-down	
Category A	drop-down	
Category B	drop-down	
Category C	drop-down	
Category D	drop-down	
Booking Status	drop-down	
Study Guide	text	255
Other Document	text	255
When Booked	date	
When Contract Sent	date	
When Contract Received	date	
Start Date	date	

Field Name	Appearance in Sumac	Maximum Characters
End Date	date	
Venue Payment Status	drop-down	
When Venue Billed	date	
When Venue Paid	date	
Venue Fee	currency amount/decimal number	
Venue Supplies	currency amount/decimal number	
Travel In	currency amount/decimal number	
Travel Out	currency amount/decimal number	
Lodging	currency amount/decimal number	
Per Diem	currency amount/decimal number	
Adjustment	currency amount/decimal number	
First Tax	currency amount/decimal number	
Second Tax	currency amount/decimal number	
Venue Total	currency amount/decimal number	
When Venue Billed 2	date	
When Venue Paid 2	date	

Field Name	Appearance in Sumac	Maximum Characters
Venue Fee 2	currency amount/decimal number	
Venue Supplies 2	currency amount/decimal number	
Travel In 2	currency amount/decimal number	
Travel Out 2	currency amount/decimal number	
Lodging 2	currency amount/decimal number	
Per Diem 2	currency amount/decimal number	
Adjustment 2	currency amount/decimal number	
First Tax 2	currency amount/decimal number	
Second Tax 2	currency amount/decimal number	
Venue Total 2	currency amount/decimal number	
Planning Time	duration	
Billing Note	text	255
Payment Note	text	255

Workshops (Tour Bookings)

Field Name	Appearance in Sumac	Maximum Characters
Name	text	60

Field Name	Appearance in Sumac	Maximum Characters
Description	text	255
Discipline	drop-down	
Language 1	drop-down	
Language 2	drop-down	
Language 3	drop-down	
Public Presentation Type	drop-down	
Omit From Operational Reports	checkbox	
Minimum #	count	
Maximum #	count	
Limit #	count	
Actual Audience A	count	
Actual Audience B	count	
Actual Audience C	count	
Actual Audience D	count	
Actual Audience E	count	
Actual Audience F	count	
Actual Audience G	count	
Actual Audience H	count	
Actual Audience I	count	
Actual Audience J	count	

Field Name	Appearance in Sumac	Maximum Characters
Low Grade	text	20
High Grade	text	20
Low Age	count	
High Age	count	
Run Time	duration	
Setup Duration	duration	
Strike Duration	duration	
Technical Requirements	text	255
Space Requirements	text	255
Technical Guide	text	255
When Venue Billed	date	
When Venue Paid	date	
Fee	currency amount/decimal number	
Supplies	currency amount/decimal number	
Travel In	currency amount/decimal number	
Travel Out	currency amount/decimal number	
Lodging	currency amount/decimal number	

Field Name	Appearance in Sumac	Maximum Characters
Per Diem	currency amount/decimal number	
Adjustment	currency amount/decimal number	
First Tax	currency amount/decimal number	
Second Tax	currency amount/decimal number	
Total	currency amount/decimal number	
Planning Time	duration	
Billing Note	text	255
Payment Note	text	255
Status	drop-down	
When	date	
End Date	date	
Call Time	time of day	
Drive Before Duration	duration	
Load In Time (Arrival)	time of day	
Show Start Time	time of day	
Show End Time	time of day	
Load Out Time	time of day	
Lunch Note	text	753

Field Name	Appearance in Sumac	Maximum Characters
Drive After Duration	duration	
End of Day Time	time of day	
Notes	text	510

Personnel (Tour Bookings)

Field Name	Appearance in Sumac	Maximum Characters
Personnel Role	drop-down	
Personnel Informed Status	drop-down	
When Performer Billed	date	
When Performer Paid	date	
When Venue Billed	date	
When Venue Paid	date	
Personnel Fee	currency amount/decimal number	
Personnel Supplies	currency amount/decimal number	
Travel In	currency amount/decimal number	
Travel Out	currency amount/decimal number	
Lodging	currency amount/decimal number	
Per Diem	currency amount/decimal number	

Field Name	Appearance in Sumac	Maximum Characters
Adjustment	currency amount/decimal number	
First Tax	currency amount/decimal number	
Second Tax	currency amount/decimal number	
Personnel Total	currency amount/decimal number	
Planning Time	duration	
Billing Note	text	255
Payment Notes	text	255
Arrival Time	time of day	
Departure Time	time of day	
Duration	duration	