

Welcome to Sumac!

Software Helping Non-profits

“ Best decision we made...

“Switching to Sumac has been one of the best decisions we have made as an organization. It has allowed us to gain better control of our information and do a much better job of connecting with our donors and volunteers.”



Executive Director
United Way of Lethbridge

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Executive Summary

Sumac is a complete, integrated non-profit software solution. It handles contact management, fundraising, donation management, volunteer management, membership management, and much more.

Thousands of non-profit professionals around the world use and love Sumac. It's easy to use, affordable, and can be customized to meet the needs of any non-profit.

Sumac runs on Windows, Mac and Linux. It is available in the cloud, or as a desktop application, and it integrates seamlessly with your website.

Every installation of Sumac includes support, so you always have access to help. In addition, Sumac offers Data Migration and Website Integration services to help you get started.

What is Sumac?

Sumac is a complete, integrated non-profit software solution that will vastly improve how you manage your non-profit. It's easy to use, affordable, and can be customized to meet the needs of any non-profit. It is available in the cloud, or as a desktop application, and is backed by exceptional services to ensure your experience with Sumac – from the minute you sign up, and through the years – is the absolute best it can be!



Watch the overview video [here](#)

“ We saw results immediately...”

“With Sumac, we got the perfect solution - excellent customer service and an easy-to-use product at an affordable price. Within moments, Sumac was helping us manage donor communications and preferences with greater efficiency and effectiveness.”



Communications Manager
Transforming Faces Worldwide

What Are the Benefits of an Integrated Database?

With data spread across spreadsheets, email programs, and other software, trying to manage a non-profit is chaotic. An integrated database solves this problem.



*Having Everything
in one place
means you're
better organized,
more efficient, and
effective!*

“ A single solution to do it all...

“We went from 80 spreadsheets to one database. Now we can get a complete picture of what is going on at the organization: our events, classes, and donors are all in one system. Data is speaking to each other, we can see what other staff members are doing, and we only have to update data in one place.”



Executive Director
Boston Children's Theatre

What Are the Benefits of an Integrated Database?



Streamline Operations

With data integrated together in one place, you can quickly search, sort, and export data to perform any task with ease. Having the data you need at your finger tips, plays a huge role in streamlining operations.



Avoid Critical Errors

With an integrated database, everything's connected and your data is speaking to each other, so mistakes like sending mail to the wrong address, or creating reports that are missing information, just don't happen.



Save Money

An integrated solution also saves you money. Instead of paying for several applications – one for email, one for processing donation, one for programs – you get everything you need in one solution with one monthly fee.



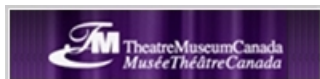
Improve Organizational Memory

An integrated database allows you to capture rich information about your organization in a central, secure location to you build strong organizational memory. So even though staff come and go, your data doesn't go with them.



Paid for itself in the first week...

“Sumac has made our communication and fundraising efforts more effective and much more efficient. In fact I think it paid for itself in the first week.”



Executive Director
Theatre Museum Canada

What Sets Sumac Apart From Other Integrated Solutions?



Most Customizable

Unlike other options, Sumac has more Add-on Options than any other non-profit software on the market. Pick the options that make sense for you and then customize to meet your organization exact needs.



Integrate with the Applications that Matter

Sumac integrates with programs you already use in your office: email programs, accounting systems, Word, Excel, and Constant Contact. It also integrates seamlessly with your website.



Lowest Price, No Hidden Fees

Sumac is the least expensive full-service non-profit management software on the market, with prices starting at just \$20/month.



Simple, Simple, Simple

Sumac is so easy to use that you can start using it immediately. It also has built-in help bubbles and videos to help guide even the most novice user.



Unmatched Support

Sumac is a company that loves helping non-profits and we really go above and beyond for our clients. Read about what our clients say about our support [here](#).

How It Works

With Sumac, you get a database perfectly tailored for you organization in 3 easy steps. Want to know more about how it works? Watch this [2 minute overview video!](#)



1 Start with the Basic CRM



2 Pick Add-on Options



3 Customize for your needs



Tada!
You have a database perfectly tailored for your needs.

1. The Basic CRM Package

Sumac's Basic Contact Relationship Management (CRM) package is the foundation for all Sumac databases. It gives you the tools to manage all the contacts related to your organization.

The Basic CRM Handles:



Contact management



Accounting



Donation management



Custom Reporting



Event Management



Campaign management

1. The Basic CRM Package

Built-in Functionality



Built-in Payment Processing

Sumac includes payment processing, so you can collect credit card payments in-house or on your website. Sumac integrates with several [payment processors](#) (fees apply) and is a PA-DSS compliant payment application.



Built-in Email Marketing

Sumac comes with built-in broadcast email so you can send thousands of personalized emails in just a few clicks without using a separate application. Sumac also provides statistical reports that let you see who opens and clicks through on emails.

“Fast and efficient...”

“We are amazed at how fast and efficient Sumac is... Our daily processing of communications and incoming donations has dramatically shifted from a full-time endeavor to a quick, easy and straightforward task.”



Executive Director
Skyworks Charitable Foundation

2. Add-on Options

In addition to the Basic CRM, you can choose Add-on Options to make Sumac more attuned to the precise type of work that your organization performs.

<i>Option</i>	<i>Description</i>
Auctions	Keeps up with the pace of any auction, ensuring your staff can easily keep track of the proceedings, producing the most value from every available lot. Dynamic updates provide quick results and reports, creating more time to strengthen rapport and gather information about the participants in your organization's auction event.
Auditions & Submissions	Typically used by arts organizations which have a judging process for participation. An art gallery may accept and judge proposals for exhibits. A theatre company may accept and review play manuscripts. An orchestra may have an auditioning process for performers. Auditions & Submissions streamlines the management of applications and proposals, to help you find the most appropriate submissions or most qualified people to match the requirements of your program
Awarding Grants	If your organization receives applications for assistance, implements a judging process to decide which are the most worthy, and distributes monies to other individuals or organizations, Awarding Grants is a complete solution to manage the entire process.
Case Management	Streamline service delivery, increase the accuracy of client information, and assist with tasks like client intake and assessment for human service organizations. Built-in tools provide analysis for your operations, allow for flexible reporting on volunteer time and service delivery, allowing your staff to focus carrying out your mission.

<i>Option</i>	<i>Description</i>
Course Registration	Streamlines the set up, delivery and follow-up for courses, eliminating the tedium of processing piles of paperwork. Course registrations also integrates with your website, so you can allow people to sign up for courses online.
Collection Management	An extraordinarily powerful tool for managing any number of distinct collections of artifacts or archival documents. It can manage your media library, relating media objects (e.g. photos, movies) to collection objects.
Custom	This is a completely customizable add-on. It's incredibly easy to set up, but if you're getting Sumac's Data Migration service, our team will set it up for you free of charge. <i>Examples of Custom Add-ons we've built for customers:</i> <ul style="list-style-type: none"> • Track a music library for an orchestra • Track food recipients for a food bank • Track interventions for a family counselling organization • Track clinical records for a hospice
Forms	Allows you to capture additional information about your constituents either on your website or in-house. (e.g. questionnaires, or registration forms).
Grant Management	Enables you to build a structured, step-by-step approach to winning grants and awards to support your mission. Build descriptions of various funding programs operated by each funder, streamline the application process, and report on outcomes.
Job Search	Takes care of all the data management associated with helping your clients find employment. Your staff can record job openings and match them to the specific skills of job seeking clients.

<i>Option</i>	<i>Description</i>
Memberships	A complete membership management solution used to manage multi-tiered membership programs. It streamlines renewals, and automates routine tasks, so you have more time. It also integrates with your website, so you can allow people to sign up and renew memberships online.
Pledges	Eliminates the work of repeatedly entering payment details for recurring donations or pledges. It automates payment processing, and the creation of donation and payment records so staff can focus on obtaining new donors and pledges. Sumac Pledges also helps you track irregular pledges (e.g. A donation of \$1000 to be made sometime next year) that typically accompany capital campaigns.
Proposals	Manages complex donation situations. It records the required information for any gift scenario, to enable you to create sophisticated illustrations for planned giving and large gifts that fall outside the routine of campaign-driven asks.
Prospecting	Rapidly calculates a percentile ranking for each contact in your database based on criteria that you specify to help you identify potential large donors for a capital campaign, good candidates for board members, or volunteers.
Reminders	Can be used as a central, all-in-one office calendar to track reminders, meetings and implement multi-step action plans. Whether it's soliciting funders, performing membership renewals, delivering client services, or turning potential prospects into significant donors (moves management), Sumac Reminders helps you stay on track,
Sales	Enables you to sell goods and services, managing pricing, taxes, discounts, and payment processing. It also keeps track of inventory levels and can handle revenue splits for consignment sales.

Option

Description

Ticketing

Helps your organization manage the details of ticket sales such as payment processing, seating assignment and ticket printing, streamlining the efforts of your staff with a single, customizable solution. It also integrates with your website, so you can allow people to purchase tickets online.

Tour Booking

Helps your organization design tour programs, schedule and book performers and venues, and do the necessary bookkeeping and follow-up. Sumac brings together program design and preparation, booking, day-of details, financial, and follow-up information into one easy to use solution.

Volunteers

Streamlines the entire process of managing volunteers, from recruitment and analysis to scheduling, performing necessary tasks and thanking those who donate effort, making sure volunteers never feel unappreciated or ineffective.

“ Embraces simplicity...”

“While many systems have moved to navigation schemes built around complex menu systems, Sumac pointedly bucks this trend and embraces simplicity.”



Consumer’s Guide to Low Cost
Donor Management Systems

3. Customize



The last step in creating a Sumac database perfectly tailored for your non-profit, is to customize it.

Unlike other systems that have standard fields that you cannot alter, Sumac gives you complete flexibility to define what information is important to your organization. In a few minutes, change the names of fields, add your own, or customize drop down menus to include the data you need for your organization. No IT staff required!

If you need help tailoring your database for your needs, we're always here to help. Whatever it is, we can make it happen! Full customization is included free when you purchase Data Migration services.

“ Very responsive to our needs...”

“When we asked for changes to the donation screen to benefit our donors, the staff at SUMAC was very receptive to our needs. We also appreciated the lack of bureaucracy that it took to get the changes implemented.”



Finance and Operations Associate
Sky Island Alliance

Services

At Sumac, we don't just offer exceptional technology, but exceptional services as well. We want to ensure your experience with Sumac – from the minute you sign up, and through the years – is the absolute best it can be!



Training

We offer both comprehensive online [Training Videos](#), and personal training done by one of the Sumac Gurus. Two personal training sessions are included free with Sumac Gold, and three for Sumac Platinum.

Sumac also has an online [User Guide](#) and [Administrator Manual](#) to help you navigate your database and get the most out of it.



Support

Unlimited customer support is included with every installation of Sumac, and it's outstanding! In fact, it's one of the things that our customers rave about, and the reason they recommend Sumac to their colleagues. You can read some of what they have to say [here](#).

“ Superior Support...”

“The quality of customer support is superior to any other product I've seen. Any questions we've had have been addressed in a prompt, professional, and courteous manner. I have recommended this product to many colleagues and will continue to do so in the future.”



Artistic Director
Cahoots Theatre Project

Services



Website Integration Set-up

Because a lot of what happens at a non-profit takes place online, Sumac integrates seamlessly with your website, so information entered online goes right into your database. Allow visitors to:

- Make donations and pledges
- Sign up and renew memberships
- Update contact information
- Book seats and pay for tickets
- Register for courses
- Fill out forms and questionnaires
- View and search a directory of custom data

One of our trained staff will coordinate and guide you through the process of customizing the web pages, and putting them on your website. Read more about website integration [here](#).



Automate processing of website transactions to save time!



1

Person comes to your website and fills out donation form



2

An email receipt is automatically sent to donor



3

All the details about the donation are automatically recorded in your database!

Services



Sumac Online

Sumac Online is a service that lets you access your data through an internet connection on any computer where Sumac is installed. Instead of your database residing on your server, it resides in a cloud-based server that is backed up by the Sumac Team. Read more about Sumac Online [here](#).



Sumac Connect

Available only to customers who have Sumac Online.

This optional service enables you to automate the processing of website transactions simply and easily. We run the transaction server that keeps your website connected to your Sumac database 24 hours a day, 7 days a week. This way your database is updated with information from your website on a constant basis without you having to think about it! Read more about Sumac Connect [here](#).

“ Finally have control of our database...

“Thanks to Sumac, we are finally have control of our database. The program is easy to use and incredibly helpful in organizing contacts, communications and fundraising. The staff at Sumac are wonderfully patient and supportive. Three cheers for Sumac!”

CHILDREN'S
BOOK BANK

Founder
Children's Book Bank

Services



Data Migration

If you have a lot of complex data and you're wondering how you'll get it all into Sumac, don't worry. We can do it for you! With the Data Migration Service, an experienced conversion expert will work with you to clean up your data and map out how you would like it represented in Sumac. Then our experts will convert your data and import it into Sumac. Read more about Data Migration [here](#).

Migrate From

- Spreadsheets
- Access database
- Email programs
- FileMaker
- Donor Perfect
- GiftWorks
- E-tapestry
- Sage
- Salesforce
- Raiser's Edge
- DonorPro
- Lots more!

“Fast turn-around...”

“I was very impressed with Sumac's turn-around time on our data conversion. Within a week we had a decade's worth of spreadsheets at our fingertips in a central location.”



Communications Manager
The Theatre Centre

Monthly Fees

License

Sumac license fees are incredibly competitive. Below is the total price for Sumac Silver and the base price for Sumac Gold and Platinum. In order to calculate your exact monthly fees for Gold, click Calculate. Monthly fees are determined by the number of contacts in your database, as well as the services, and Add-on Options you select. Your monthly price includes it all: support, upgrades, and usage, so there are no surprises!

SILVER Starting at \$20/month	GOLD Starting at \$45/month	PLATINUM Starting at \$400/month
500 – 1000 contacts	1000 – 30,000 contacts	30,000 – unlimited contacts
Includes: Basic CRM and <i>any two Add-on Options</i>	Includes: Basic CRM. <i>Add-on Options cost extra</i>	Includes: Basic CRM and <i>any five Add-on Options</i>
Free online training	Free online and personal training	Free online and personal training
Unlimited phone and email support	Unlimited phone and email support	Unlimited phone and email support
Unlimited upgrades and usage	Unlimited upgrades and usage	Unlimited upgrades and usage

[Calculate](#)

Monthly Fees

Optional Services

Besides your license fee, there are two services that have monthly fees associated with them.



Sumac Online

\$25/month

[Learn more](#)



Sumac Connect

\$25/month

\$70/month for Sumac Platinum

[Learn more](#)

One-Time Fees

Besides your monthly fees, there are two services that have a one-time fee associated with them:



Data Migration

If you choose the Data Migration service, there is a one-time fee:

Sumac Silver up to 1,000 contacts – \$850

Sumac Gold up to 5,000 contacts – \$1,500

Sumac Gold with 5,000+ contacts – \$2,000










Sumac Platinum – starting at \$3,500 (Ask for a quote)



Website Integration Set-up

If you choose to take advantage of our Website Integration Set-up service, there is a one-time fee of \$700.

Cost Comparison

	One User, 900 Contacts		Three Users, 20,000 Contacts	
	First Year	Yearly ongoing + Email Support	First Year	Yearly ongoing + Email Support
	\$240	\$240	\$1680	\$1680
	\$2400	\$2400	\$3600	\$3600
	\$2995	\$725	\$5540	\$825
	\$10,050	\$3,000	\$20,025	\$3,000
	\$3480	\$1980	\$4620	\$3120
	\$1,759	\$1,260	\$5,267	\$4,368
	\$444	\$774	\$4032	\$4866
	\$859	\$540	\$3939	\$2820
	\$1668	\$1668	\$5064	\$506

**Numbers are taken from the 2013 NTEN & Idealware "Detailed Review of Low Cost Donor Management Systems."*

Get started today!

Contact the Sumac Team

+1 416 504 8724

sales@sumac.com

“ Tailored for our needs...

“Thanks to Sumac, we now have an easy to navigate, custom database that’s tailored to OUR needs.”



Communications Officer
Community Living Peterborough

Frequently Asked Questions

Basic

Is Sumac user-friendly?

Yes. Simplicity and consistency of design make Sumac so straightforward and user-friendly that training takes just a couple of hours.

Built-in help and wizards, as well as excellent documentation, free online video training and phone tech support give you all the support you could possibly need.

Is it cloud-based?

Sumac has a [cloud-based version](#) that allows you to access your database from anywhere there is an internet connection.

What computers does Sumac run on?

Sumac runs on Windows, Mac, and Linux computers.

Functionality

Does Sumac do tax receipting?

Yes, Sumac can issue tax receipts to be mailed out to your donors. Alternatively, if you want to email receipts to donors, Sumac can produce encrypted receipts so that they satisfy government requirements for electronic receipting.

The receipts can be customized for your own organization. We do have some sample receipt templates you can use, or you can create your own.

Does it work with Quickbooks / Simply Accounting?

Yes. In a few steps, you can export your data from Sumac into your accounting software. You can also set up the account codes in Sumac to match the account codes you use in your accounting system, so you can easily reconcile information between the two.

Does it do online donations?

Yes. Sumac gives you a [page](#) to put on your website. This page works with your Sumac database. All of the information entered online goes directly into your database.

Subscription / Cost

How much does it cost?

Sumac is one of the most cost-effective non-profit software solutions on the market. Prices start at [\\$20/month](#), and go up from there based on the number of contacts in your database, and the services you select. Your license fee includes support and all upgrades.

Do we pay by the month or year?

Most organizations pay yearly, but if you need to, you can pay monthly.

Can I cancel Sumac anytime?

Yes. If you are unhappy with Sumac at anytime, you can cancel your subscription. There is no obligation.

Can I remove or add features to Sumac anytime?

Yes. Sumac was designed to grow with you, so if you need a larger database, or you need to add an option, call us and we'll upgrade your package on the spot.

Will the cost increase year to year?

No. Unless you change plans, add services, or options, the price you sign up with is the price you continue to pay. We do not raise prices for existing customers.

Are there any other fees I should know about?

Besides your license fees, there are a few optional services with fees: [Sumac Online](#) is \$25/month, and [Sumac Connect](#) is \$25/month. [Data Migration](#) has a one-time fee associated with it, as does [Website Integration set-up](#).

Data Security

Where is my data stored?

If you are using the in-house version of Sumac, the data is stored on your own server. If you are using [Sumac Online](#), your data is stored on our server and is backed up daily in three locations, to make sure it's secure.

Can anyone access the database?

You must have a username and password to log on to Sumac. The administrator of the database can restrict what each user can do and what data they can see.

Who owns the data?

All your data is yours.

Getting Data In / Out

Is there an easy way to get all my data into Sumac?

Yes. Your data may be in spreadsheets, word processing documents, email programs, accounting programs, and other databases. To get your data into Sumac, you can use Import Workspace to import, validate, and clean up your data. Once the data is clean, you can import the data into the database.

If you purchase the [Data Migration](#) service, we do the work for you. An experienced conversion expert will work with you to clean up your data and map out how you would like it represented in Sumac. Then our experts will convert your data and import it into Sumac.

Will I be able to get my data out of Sumac?

Yes. Sumac was designed to allow you to easily get data in and out. If you do decide to cancel Sumac, you can easily export all your data.