Users Guide

2019-04-02
Version: 4.5.3

Disclaimer

THIS DOCUMENT WAS PREPARED TO HELP USERS OF SOFTWARE OF SOFTWOOD TECHNOLOGY INC. (“SOFTWOOD”). THE CONTENTS OF THIS DOCUMENT SHALL NOT BE USED FOR ANY OTHER PURPOSE WITHOUT THE EXPRESS WRITTEN PERMISSION OF SOFTWOOD. SOFTWOOD SUPPLIES THE MATERIAL IN THIS DOCUMENT AS IS, WITHOUT CONDITION, REPRESENTATION OR WARRANTY, EXPRESSED OR IMPLIED, OF ANY KIND. SPECIFICALLY, SOFTWOOD DISCLAIMS AND EXCLUDES ANY CONDITION OR WARRANTY, INCLUDING ANY IMPLIED WARRANTY OF MERCHANTABILITY AND DISCLAIMS AND EXCLUDES ANY CONDITION OR WARRANTY, INCLUDING ANY IMPLIED WARRANTY, OF FITNESS. THERE ARE NO WARRANTIES WHICH EXTEND BEYOND THE DESCRIPTION ON THE FACE HEREOF.

Trademarks

Throughout this document, certain designations may be used that are trademarks that identify the goods of third parties. Although this document attempts to identify the particular trademark owner of each mark used, the absence of a trademark symbol or other notations should not be taken as an indication that any such mark is not registered or proprietary to a third party. Use of such third-party trademarks is solely for the purpose of accurately identifying the goods of such third party.

Windows 2000, Windows XP, and Windows Vista are registered trademarks of Microsoft Corporation.

Softwood, Sumac, and the Sumac logo, are trademarks of Softwood Technology Inc.

Copyright

Table of Contents

Sumac Documentation

Sumac is described in three books:

Sumac Users Guide	Use Sumac on a day-to-day basis.
Sumac Administrator Manual	Install Sumac. Set up system-wide lists and options settings that affect all users.
Security and Risk Management	Use Sumac to protect your data.

You should be familiar with the *Users Guide* before reading the *Administrator Manual*.

Version Control

Changes

Most Sumac documentation changes each time there is a release. Since Sumac is released approximately once every two months, this means the documentation is regularly updated.

If a particular document has not had to be updated because of new software releases, then that document is reviewed and updated no less than once per year.

Current Version

The current version of Sumac documentation can always be downloaded from http://sumac.com/install.

Introduction to Sumac

Background

Sumac helps non-profit organizations effectively manage relationships with all stakeholders, leading to larger and more consistent donations.

Through ease of use and strategic support, Sumac enhances organizational efficiency making your data management (almost) fun.

Modules

Every installation of Sumac includes the roots modules to manage: campaigns, case management, communications, contacts, donations, email, events, grow-your-own, internet, payment processing, reports, and time tracking.

One or more specialized modules may be available in your installation of Sumac: auctions, auditions & submissions, course registration, fund requests, job search, memberships, pledges, proposals, prospecting, reminders, sales, ticketing, tour booking, volunteers.

Know Your Computer

Sumac runs on Macintosh, Windows and Linux computers. Users across different platforms of Sumac can co-exist comfortably, working from the exact same database. The versions work identically.

Before using Sumac, you should be familiar with the use of your computer. In particular, this manual assumes that you know how to:

- run a program
- use a mouse to operate scroll bars and buttons
- edit text using your keyboard: Ctrl-X, Ctrl-C, and Ctrl-V perform cut, copy, and paste operations respectively (the Ctrl key is used on Windows, the command key is used on the Macintosh)
- be familiar with using the mouse and keyboard to perform selections from menus.

Using This Manual

Learn About General Data Entry in Sumac

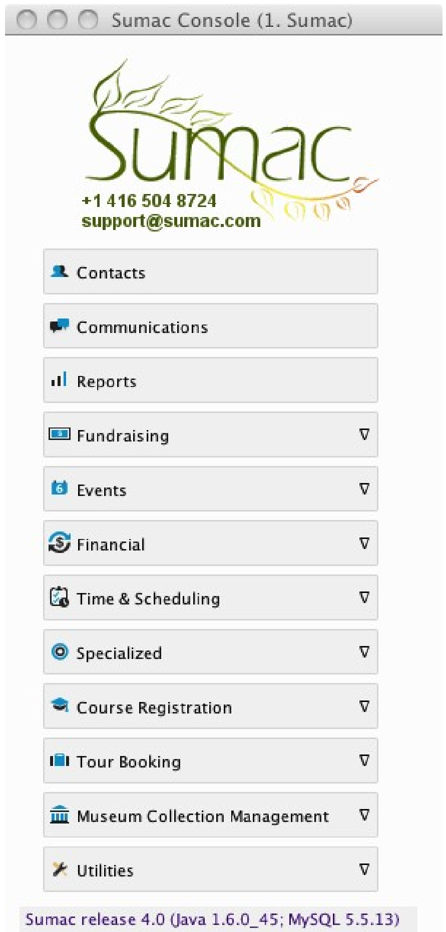
There are several ways to make Sumac data entry easier and more accurate. Some of these are described in *Data Entry* on page 22.

Learn About Lists in General

As you work with Sumac, you are frequently presented with lists of related data: a list of CONTACTS, a list of COMMUNICATIONS, a list of REMINDERS. It is best to start by learning the basic techniques for using one of these lists: how to scroll, edit, add and remove entries in the list. Read *Using Lists* on page 29. This chapter teaches you the standard things you can do with any list of data items in Sumac.

Sumac Console

Once you have logged on to Sumac, you are presented with the Sumac Console. The Sumac Console may look like this:



The exact configuration of command buttons may vary, depending on the types of data you are allowed to see.

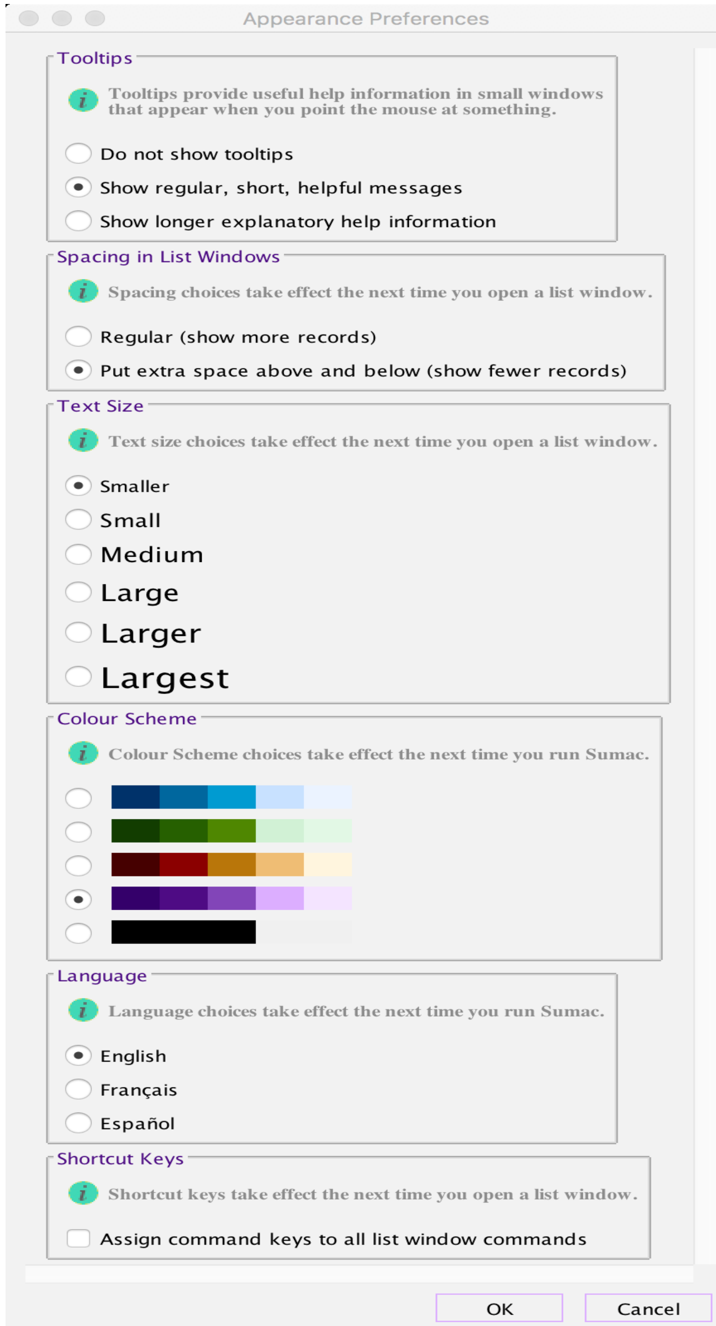
The title bar shows the name of the program and, in parentheses, the name of the database that is currently open.

In this window, you click the button that corresponds to the type of data that you want to work with. For example, if you want to examine and edit the list of CONTACTS, you start by clicking the Contacts button in the Sumac Console.

The status bar at the bottom of the window shows the release of Sumac and version number of the Java and database that are running.

Appearance Options

Sumac allows you to control several aspects of the user interface. Most list windows have a Settings/Appearance command. When you choose this command, this window appears:



You can tell Sumac how to present these appearance changes:

Tooltips	Tooltips are little help windows that appear when you point at things. They come in short and long forms, and you can make them disappear altogether.

Spacing in List Windows	This option puts a bit of blank space above and below each line in scrolling lists, making them easier to read.
Text Size	If your display has very small pixels or you have trouble reading it, make the text bigger.
Colour Scheme	This affects the colours of buttons, text, highlighting, and shading. Hint: The last colour scheme is a high contrast scheme that may help a user with certain types of visual impairment.
Language	Sumac can always store and manage data in any language. This option lets you can change the language of text in the user interface of the software itself.
Shortcut Keys	If you set this check box, then Sumac assigns keyboard equivalents to all the menu command buttons in the console window and on the left hand side of all the list windows. This lets users who prefer keyboards perform most commands with their keyboards.

Screen Size

The minimum screen size for Sumac is 1024 x 768 pixels. Several specialized modules work better with larger screens.

Fonts on Windows

On Windows, if you use a control panel to tell Windows to use Large fonts, several fonts in the Sumac user interface become larger.

Fiscal Years

In several places in Sumac, you can choose a range of dates by choosing from a drop-down menu. If you want Sumac to know about your fiscal year, then click Utilities/Customize Database/Preferences/Payments and enter the first month and day of your fiscal year.

Data Entry

Change Your Password

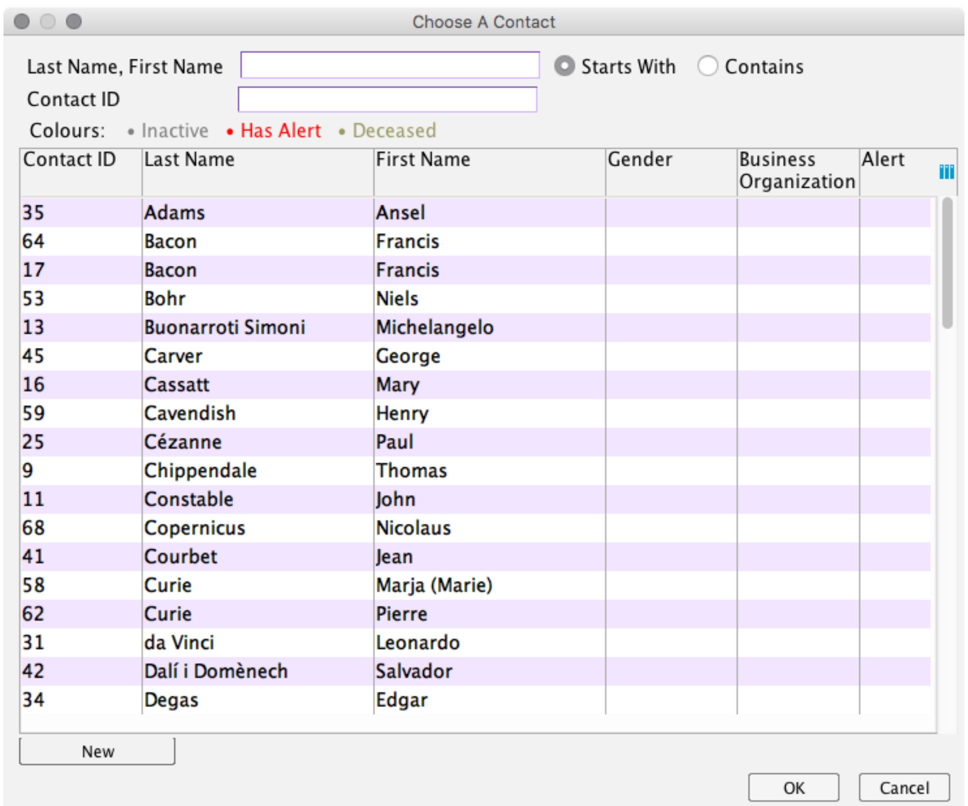
When you first start to use Sumac, you are assigned a user ID with a log-on password. If you want to change the password that was assigned to you, click Utilities/Change Password in the Sumac console window.

If you are an administrative user of Sumac and you would like to change another user's password, click Utilities/Sumac Administration/Users.

Choosing a Contact

In many dialogs you have the option of clicking 👤 to choose a CONTACT. This dialog appears, showing all contacts in the database. Note that inactive contacts are grey, those with alerts show in red, and if your database preferences specify a colour for deceased contacts then they appear in their chosen colour.

You may choose which columns to show in the list of contacts by clicking the blue icon immediately above the vertical scroll bar.



Type the first few letters of a CONTACT's last name to shorten the list. If you want to specify the first name too then type a comma then the first name. For example, if you enter *Smith*, you may get a large number of contacts, but if you enter *Smith,R* you will only see Smiths whose first name starts with *R*.

When you see the CONTACT you want to choose, you can choose it by:

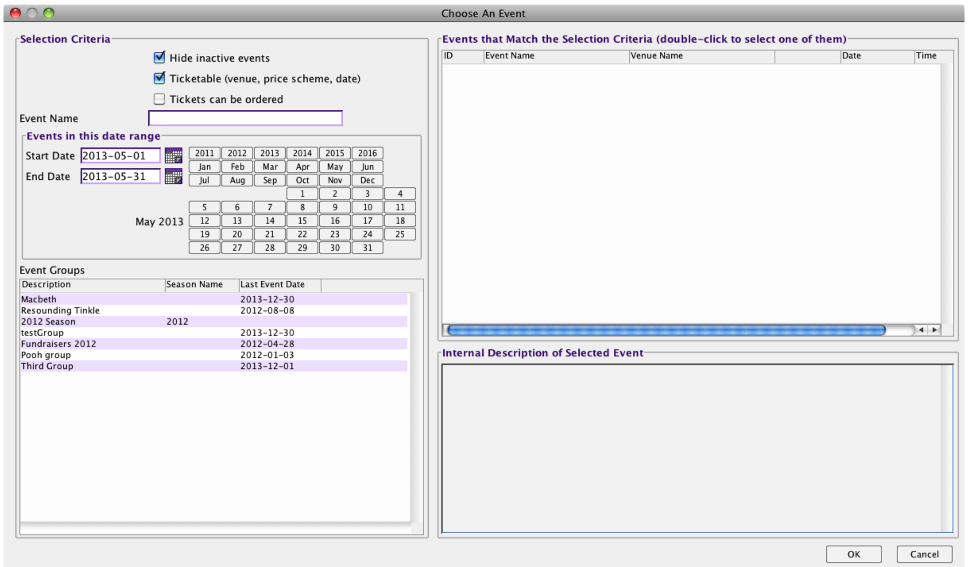
- clicking the CONTACT once to selected it, then clicking the OK button
- clicking the CONTACT once to selected it, then pressing the Enter key on your keyboard
- double clicking the CONTACT

- if there is only one CONTACT showing in the list, click the OK button or press the Enter key on your keyboard

If the CONTACT is not in the database, then in most situations there is a New button that enables you to add a new CONTACT.

Choosing An Event

In many places in Sumac, when you are asked to choose an event, you will see this dialog that lets you pick an event using many different criteria.



Enter selection criteria on the left side of the window. The corresponding list of possible events appears on the right hand side. Here are the selection criteria:

Search Criterion	*What It Shows*
Ticketable	Click this checkbox to show only ticketable events. This is events that have a venue, a price scheme, and are today or later.
Tickets can be ordered	This checkbox shortens the list to show only events that are actually orderable on the current date.
Event Name	As you type into this box, the list of possible events is shortened to show only those whose Event Name starts with the typed characters.
Start Date	Show only events on or after this date.
End Date	Show only events on or before this date.
[date buttons]	Click a Year button to fill in the dates with a year. Click a Month button to fill in the dates with that month within the year. Click a Day button to fill in the exact date. Whenever you click one of these buttons, the list of events on the right hand side instantly shows just events in the specified date range.
Event Group	Show only events in the selected group.

Editing Text

In all text fields, you can use control keys to perform editing operations as follows:

Keyboard	*Action*
Ctrl-Z	Undo the last editing operation that was performed in the field.
Ctrl-X	Cut the selected text, putting it on the clipboard.
Ctrl-C	Copy the selected text, putting it on the clipboard.
Ctrl-V	Paste the text on the clipboard in the place of the selected text.

Hint: On Macintosh, use the command key instead of the control key.

You can also right-click any text field to get a menu with Undo, Cut, Copy, and Paste commands.

Entering Dates As Text

When using Sumac, you can enter dates in several formats. Here are the formats accepted:

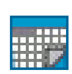
Format	*Example*
ISO: international standard	2005-12-31
ISO variants	20051231 2005.12.31 2005/12/31
Short: varies by locale	12/31/05 (in U.S. locale)
Medium: varies by locale	Dec 31, 2005 (in U.S. locale)
Long: varies by locale	December 31, 2005 (in U.S. locale)
Very long: varies by locale	Date, mm dd, yyyy AD
No year: enter as month/day, and Sumac assumes the current year.	12/31

Whenever you enter text into a date field, Sumac analyzes it to ensure it is a correctly formatted date. It also converts it to ISO format and shows it to you, so you can ensure that Sumac correctly understood what you entered.

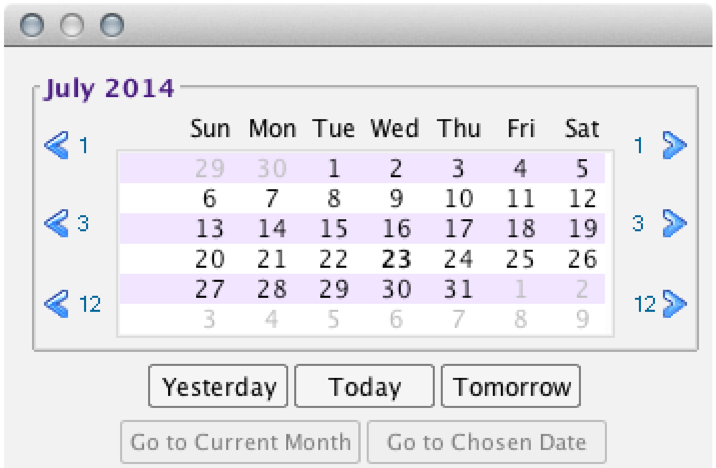
Note that some date formats vary by locale, i.e. they depend on where you are and how you have set up your computer to format dates.

Entering Dates By Clicking

Beside each date field, there is a calendar icon button:



When you click this button, the following dialog appears:



- Click a date to enter the date into the text field and dismiss the dialog.
- Click arrows to move back or forward one, three, or 12 months.
- Click *Yesterday*, *Today*, or *Tomorrow* to choose one of those specific dates
- Click *Go to Current Month* to move to the current month.
- Click *Go to Chosen Date* to move to the month that holds the date already chosen.
- Click the close box or press the Esc key to dismiss the dialog without choosing a date.

Entering Names

> Hint: The way that Sumac capitalizes words can be controlled by the Sumac Administrator using the Utilities/Customize Database/Preferences command in the Sumac Console.

When you enter values into the following fields in Contact records, Sumac automatically capitalizes them:

- prefix
- first name
- middle name
- last name
- city
- state
- country
- business title
- business organization
- business department

Note that Sumac does *not* apply its capitalization rules when you edit (in contrast to entering for the first time) a text field. If you need to enter a name that does not start with a capital letter, here is what to do:

- ✔ Enter the name. Tab or click out of the field.
- ✔ Sumac automatically capitalizes the name.
- ✔ Click back into the field and change the letters that were incorrectly capitalized.

Entering Telephone Numbers and Extensions

When entering phone numbers into Contact records, Sumac automatically formats them. So if you enter 4165048724 (in North America) it is converted to 416-504-8724.

You can tell Sumac your default telephone number format. In the Sumac Console window, choose the Utilities/Customize Database/Preferences command in the Sumac console, click the Country tab, then and choose your country from the telephone number format drop-down menu. Here are the choices currently available (more are always being added):

Australia	Generally, Sumac expects 8 or 10 digits which it formats as follows: 9999 9999 99 9999 9999 If a phone number has 6 digits, it is formatted thus: 99 99 99 If a 10-digit phone number starts with 04 or if its third and fourth digits are 00, then it is formatted as follows: 9999 999 999
North America	Sumac expects 7 or 10 digits which it formats as follows: 999-9999 999-999-9999
U.K.	Sumac always reformats the phone number to be prefixed by a zero. Excluding the leading zero, Sumac expects U.K. phone numbers to be 7, 9, or 10 digits long and formats them in accordance with this source: `http://en.wikipedia.org/wiki/Telephone_numbers_in_the_United_Kingdom`
Mexico	Sumac expects 10 digits which, depending on the first two digits, it formats in one of these two ways: 99 9999 9999 999 999 9999

If you need to enter a phone number that does not conform to the country standard you have chosen, perhaps because it is an international number, precede it with a plus sign (+). The international convention is that a phone number starts with a plus sign followed by country code.

Telephone extension fields allow *only* numeric characters; nothing else is permitted. You do not need to put *ext.* or *X* in front of an extension number. Whenever Sumac formats a telephone number, it inserts appropriate punctuation and spacing if there is also an extension.

Entering Postal Codes

When entering Canadian or U.S. postal codes into CONTACT records, Sumac automatically formats them. Sumac is able to understand and format Australian, Canadian, United Kingdom, and United States postal codes.

You can tell Sumac which ones you use. In the Sumac Console window, choose the Utilities/Customize Database/Preferences command in the Sumac console, click the Country tab, then click checkboxes to tell Sumac which postal code formats you want to be recognized.

As you enter postal codes, Sumac automatically re-formats them based on the company standards you select. So if you choose Canada and United States as your supported formats, and enter *m1m2m3* it is converted to *M1M 2M3*, if you enter *123456789* it is converted to *12345-6789*.

Entering Special Characters on Windows

If you use Sumac under the Microsoft Windows operating system, here is how to enter some frequently used accented characters. Note that these instructions assume you are using a standard U.S. keyboard with standard character encoding.

- ✔ Make sure that your keyboard's Num Lock is on. If it isn't, turn it on.
- ✔ Hold down the Alt key.
- ✔ To obtain the Character shown in the following table, type the digits in the Code column, entering them from the numeric key pad part of your keyboard.
- ✔ When you release the Alt key, the character appears.

Character	*Code*
Á	0193
á	160
À	0192
à	133
Â	0194
â	131
Ä	0196
ä	132
Ç	128
ç	0231
É	0201
é	130
È	0200
è	138
Ê	0202
ê	136
Ö	0214
ö	0246

Repeating Values

When entering or editing CONTACT records, you can save data entry time spent entering values, already entered in a previous CONTACT record, by using the following shortcut:

- ✔ Insert your cursor in the appropriate CONTACT field.
- ✔ Enter a ditto mark (a double quote: ") or a single quote (').
- ✔ Tab out of the field.
- ✔ Sumac interprets the single or double quote mark as an indication that you wish to repeat a value previously entered.

Keyboard Equivalents for Buttons

Some buttons have keyboard equivalents. If you hold down the Alt key, the character that needs to be keyed to activate the button is underlined in the button name. Hold down Alt and press that key to activate the button.

Alt-n	◆ in list windows: equivalent to clicking the New button
Enter	◆ in list windows: activates the Search button ◆ in dialogs: activates the Yes or OK button
Esc	◆ in list windows: closes the window ◆ in dialogs: activates the No or Cancel button

> Hint: On Macintosh keyboards, the Alt key is usually labelled Alt Option, or sometimes just Option. Also, on a Macintosh, if the cursor is in a text field, the Alt-Option key usually produces a special character that is not recognized as a shortcut for a button.

Appearance Command

The Appearance command, available in most list windows, allows each user to specify whether he or she wants keyboard equivalents assigned to most commands. If the user turns on this option, then almost all command buttons are given a command-key equivalent.

Spell Checking

Sumac supports spell checking. This feature works in any language.

To enable this feature, you need a list of acceptable words. A word list file is a text file with one correctly spelled word on each line. You can use your own, or download one from http://sumac.com/support/. You can add specialized vocabulary (one word per line).

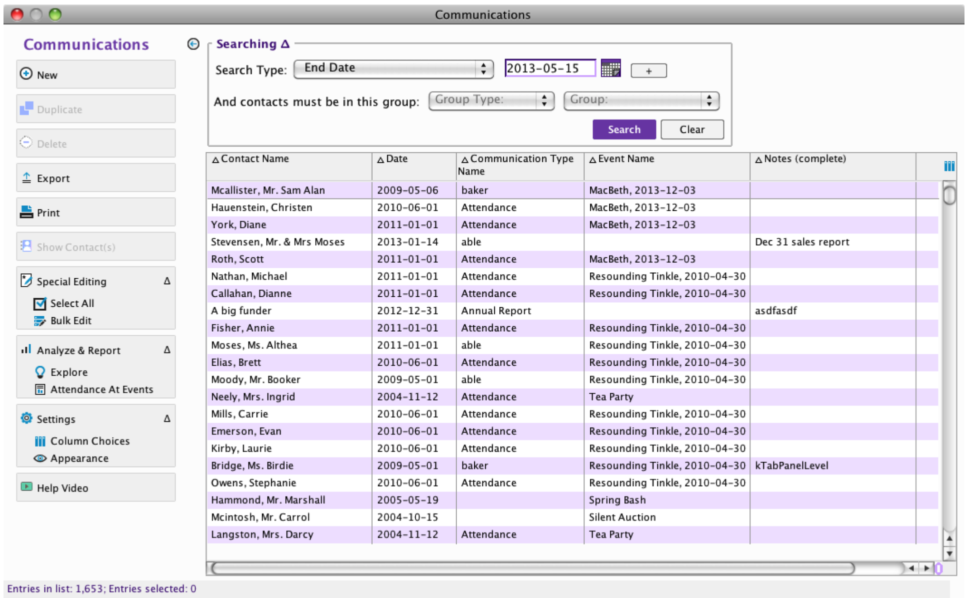
Once you have your word list file, here is how to make it available to Sumac, enabling the spell checking feature:

- ✔ Rename the file to *dictionary.txt*.
- ✔ Put the file in the SumacSettings folder on your computer. This folder is in your user home folder, whose location depends on which type of computer you are using. Another file named databases.txt is already in that folder, so you can search for either *SumacSettings* or *databases.txt* to find the folder.

Using Lists

Introduction

Management of data in Sumac is done by entering different types of information into the appropriate list. Here is a picture of a list of COMMUNICATIONS:



This list illustrates the key features of all other Sumac data lists:

- Most of the window is occupied by a scrolling list showing the data elements.
- Like the COMMUNICATIONS list in the picture, most major lists also have Search features above the scrolling list of data elements. The specific search criteria that are available vary depending on the list.
- There are buttons to create a new element in the list (New), to Duplicate a selected element, to delete an element from the list (Delete), and to Export or Print the list, and to show contact records for the selected elements in the list (Show Contact(s)). If you hover the mouse on a button in the window, a small window of help information appears to tell you about the item you are pointing at.
- Some lists have extra buttons. For example, the COMMUNICATIONS list in the picture above has a Special Editing commands to select all records or to bulk edit them. It also has some reports under Analyze & Report, and standard commands for Settings.
- At the bottom of the list, below the buttons, there is an information bar. This shows how many entries are visible in the list and how many are selected. If you tell Sumac to perform an operation that takes a long time, this information bar turns into a progress bar, that indicates how much longer the operation will take.

The extra features of each list are described in the chapter that discusses the list. For example, there is more information about the extra features of the COMMUNICATIONS list in the COMMUNICATIONS chapter. For now, consider the following features which apply to all lists.

Saving Search Criteria

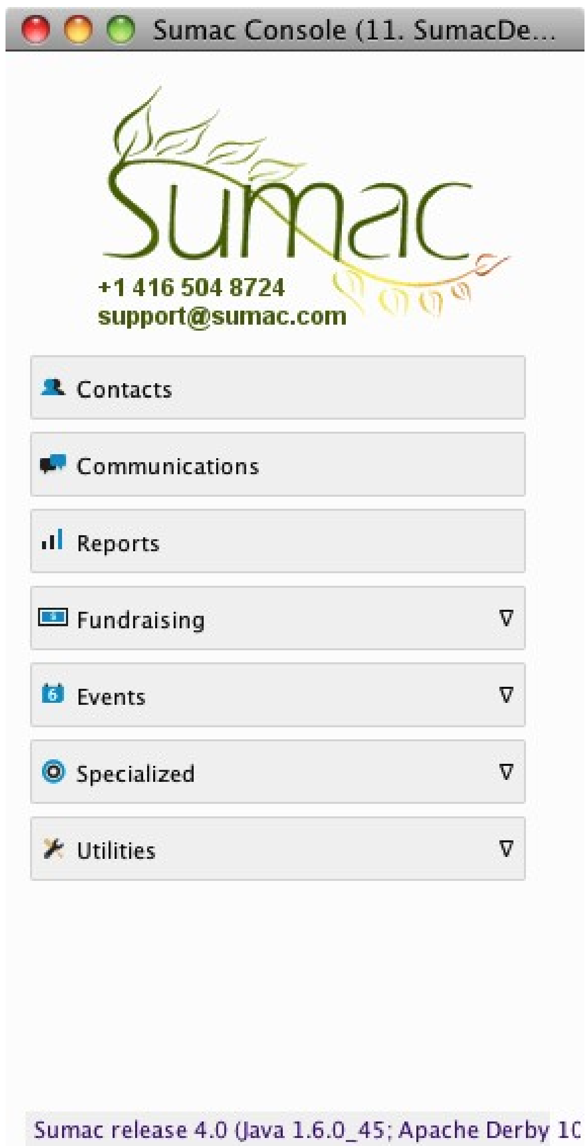
In the Searching panel in some list windows Load and Save buttons are available to save and reload search criteria. When you save the search criteria, Sumac saves:

- the search criteria
- the set of columns that are currently showing
- the sort order of the columns that are currently showing

Later, when you load the search criteria, Sumac resets the columns being displayed, sets the search criteria, performs the search, and sorts the records as they were before. The result is that you can save a “report”, since a report usually consists of the things being saved: search criteria, column selections, and sort order.

Showing a List

Here is the Sumac Console. Yours may have different buttons depending on the options you have licensed.



To show a list of data elements, click the corresponding button in the Sumac Console. For example, the COMMUNICATIONS list is obtained by clicking the Communications button in the Sumac Console.

List windows remember their location and size on your computer's screen. You can close the list window, then the next time you open it, it will be in the same place. This helps organize information if you need multiple lists open at a time.

Hiding a List

To remove the list from the screen, click the close box in its title bar. The positioning of the close box depends on the operating system you are using. For example, in Windows, the close box is at the right hand end of the window's title bar; on a Macintosh the close box is at the left hand end of the title bar.

You may also close a list window by pressing the Escape (Esc) key on your keyboard.

Moving Up and Down in a List

The data appears in a scrolling list, one entry per line. You can use standard scroll bar operations to move up and down in the list.

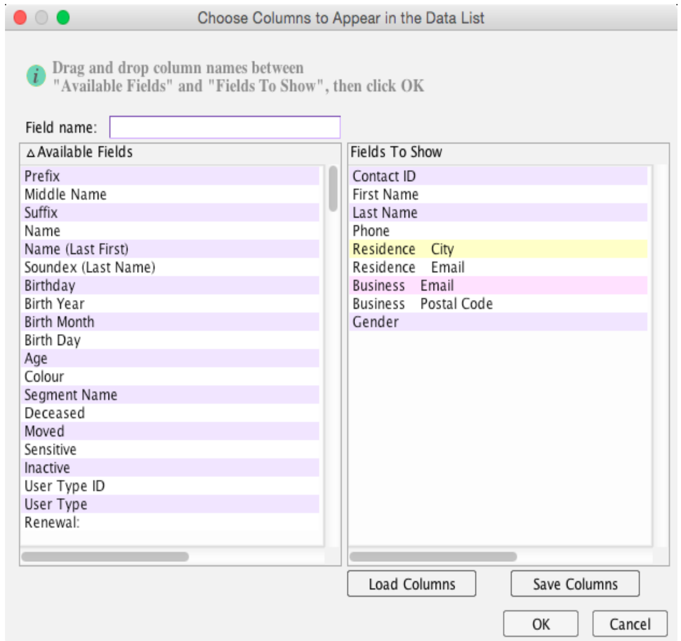
If you have a wheel on your mouse, you can scroll up and down in a list by pointing the mouse at the scrolling list (its content, its title bar, or its scroll bars) and rotating the mouse wheel.

If you click a line in the scrolling area then it gets the focus, i.e. it becomes the active item on the screen that will receive input from the keyboard. These keyboard equivalents can be used to navigate within a scrolling list:

Keyboard Equivalent	*Action*
Up arrow	Select the line above the currently selected line.
Down arrow	Select the line below the currently selected line.
Page up	Scroll upwards one screenful.
Page down	Scroll downwards one screenful.
Home	Scroll to the top of the list.
End	Scroll to the bottom of the list.

Changing the Columns Showing in a List

Most major lists allow you to choose which columns are being displayed. Click the icon on the right side of the column titles. This button presents a dialog that allows you to choose the fields that you wish to show in the list.



The list of fields that are available is on the left side. The list of fields that are being displayed is on the right. Drag from one list to the other to get exactly the columns that you want to show in the list. Sort column names alphabetically by clicking the header, or type into the *field name* box to refine your options. You can also drag to change the order of columns to be displayed. Click OK to have the new set of columns displayed.

> Hint: You can create a very specific *ad hoc* report by choosing the fields you want to show, searching for specific entries in the list, then clicking a column title to sort them. You can then export or print the report.

Sorting a List

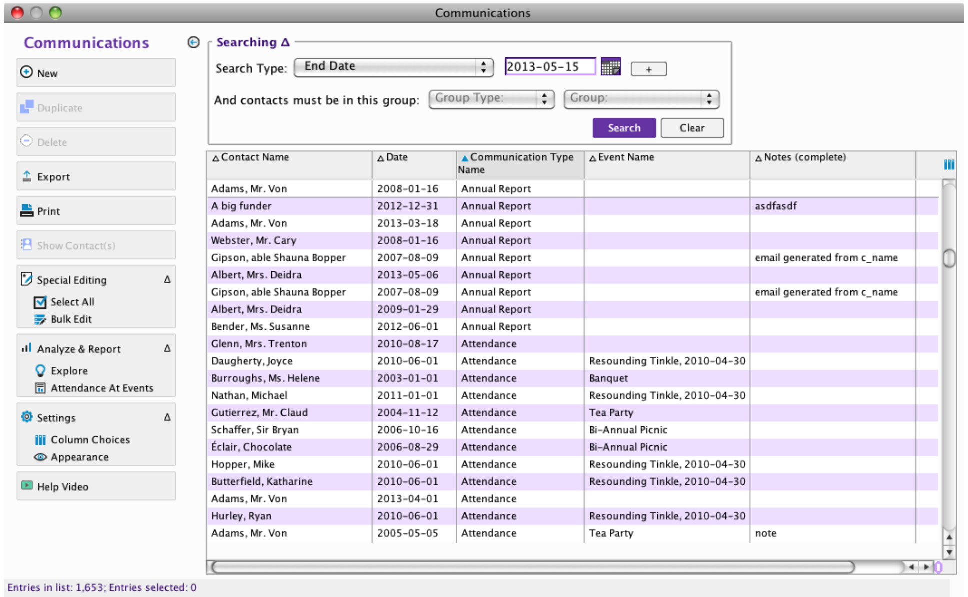
Sort On One Column

The contents of a list can be sorted by clicking the title of the column on which you wish to sort; click once to get an ascending sort, click again for a descending sort. Arrows in the column titles indicate the direction of the last sort you performed.

> Hint: If you click to sort a column of numbers, the sum of all the numbers in the column is displayed in the status bar at the bottom of the window.

> Hint: When you click to sort a column that contains lookup list entries, the status bar at the bottom of the window shows the number of distinct entries that are in the column.

Here is the list of COMMUNICATIONS after it has been sorted (ascending) by the Communication Type Name column.



Sort On Two Columns

Most of lists in Sumac support two-level sorts. When you click a column title to sort a list, the previously-sorted column is used as a secondary sort. For instance, to sort a list of contacts by province and, within each province, by last name, click to sort by last name (the secondary sort) first, then click to sort by province.

Sorting the Contacts List

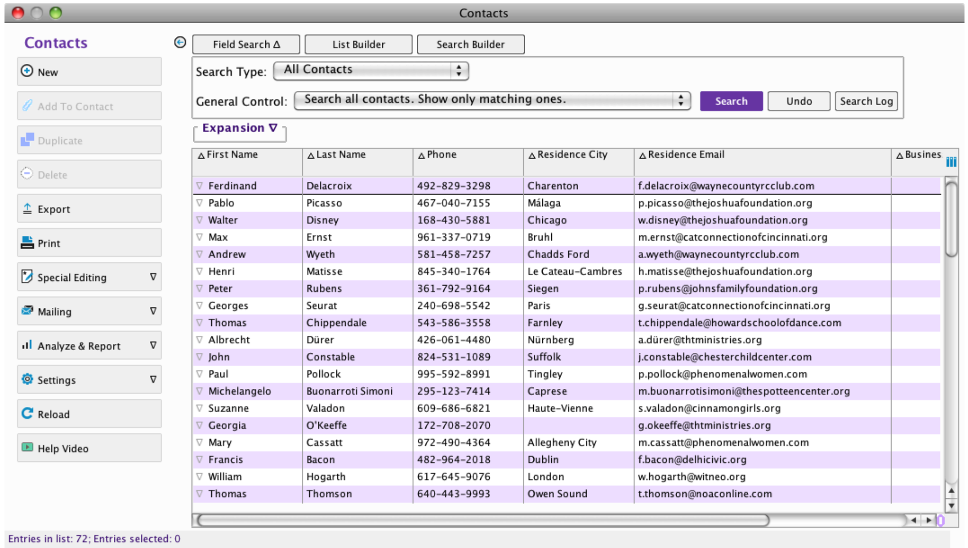
When you sort the contact list (or some other lists that show contact names), if you sort by last name, the list is also sorted by first name.

When you sort the contacts list by last name or organization name, articles are removed from the start of the names before sorting. The following articles are removed:

English	*French*	*Spanish*
A An The	L L' La Les Un Une	El La Las Los

Adjusting Column Widths

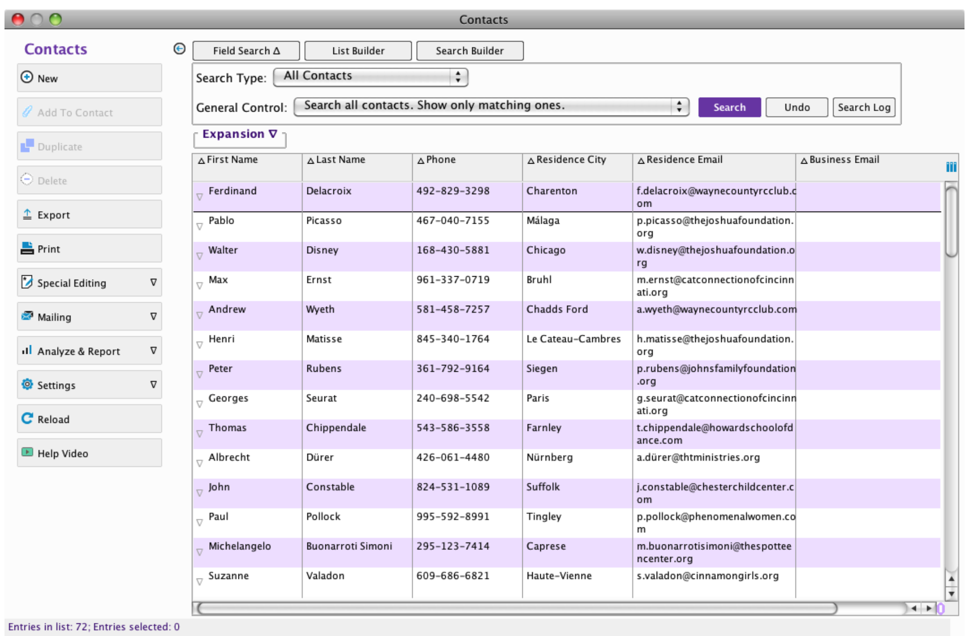
You can adjust a column's width by dragging the line on the right hand side of the column header. This picture shows the Residence Email column widened to show the full text of an entry.



Adjusting Row Heights

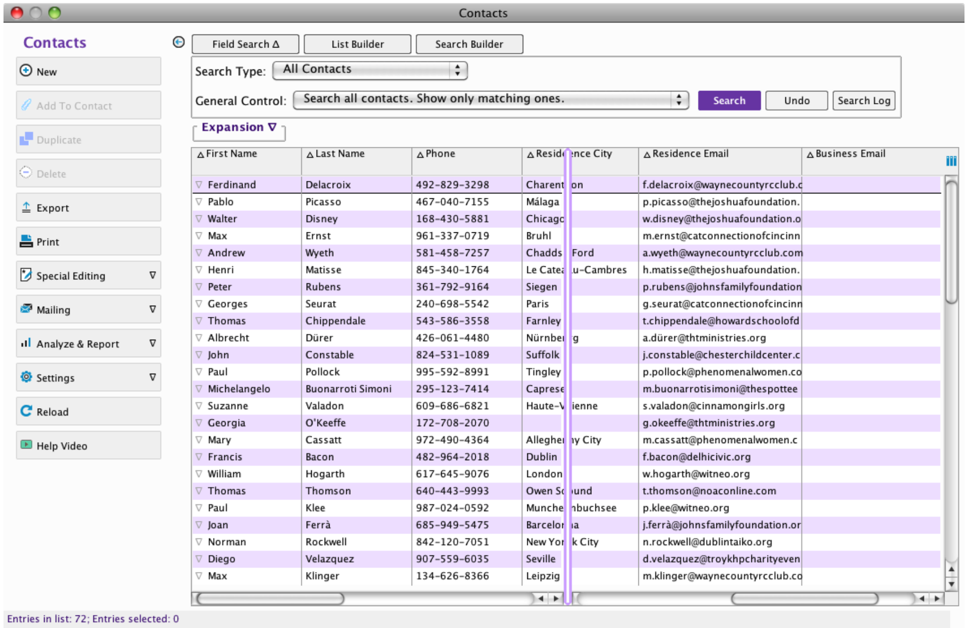
If a single cell has a lot of content, you can expand it by increasing either its width (see above) or its height.

Adjust the height of each row by dragging the line that appears between the first and second rows. Here is the list of CONTACTS, showing two lines on the screen for each record.



Splitting a List

Sometimes it is convenient to vertically split the list so that you can scroll the left and right sides independently. There is a small oval immediately to the right of the horizontal scroll bar that lets you do this. Drag it to the left, or double click it, to split this list like this, so the left and right sides can both be scrolled:



Examining or Editing An Entry in a List

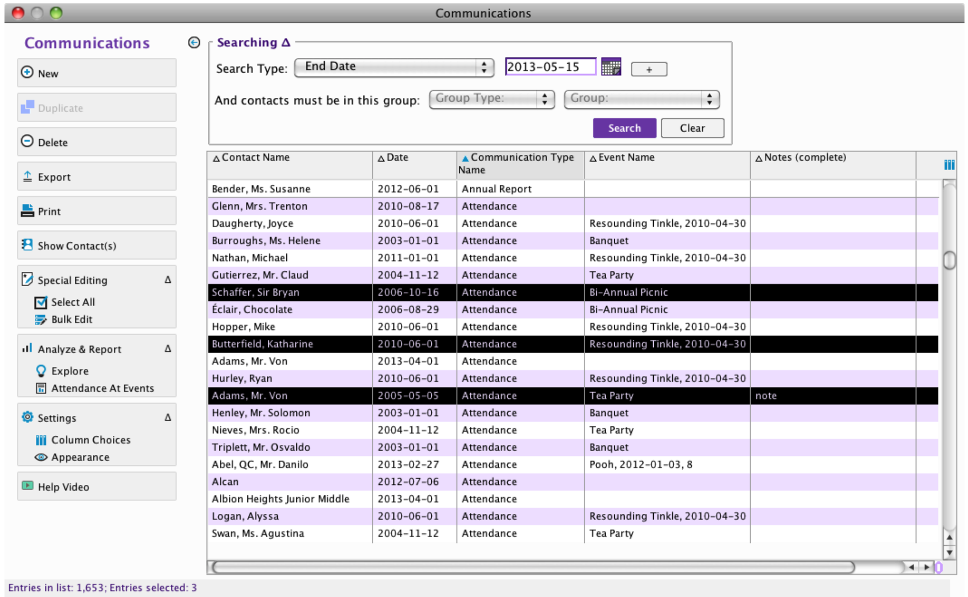
Double click to see the contents of a line. If security settings allow, then you may change the data and click OK to save it to the database.

Clicking to Select Entries in a List

Some operations on a list require you to select one or more entries in the list. You do this by clicking items in the list. Here are the special clicking actions that are available to select or de-select data:

Clicking Action	*Action*
Click	Select only the line that is clicked.
Shift Click	Select several consecutive lines, from the one most recently clicked to the one being shift clicked.
Control (Ctrl) Click	Select or de-select a single line. Hint: Use the Command key on Macintosh keyboards.

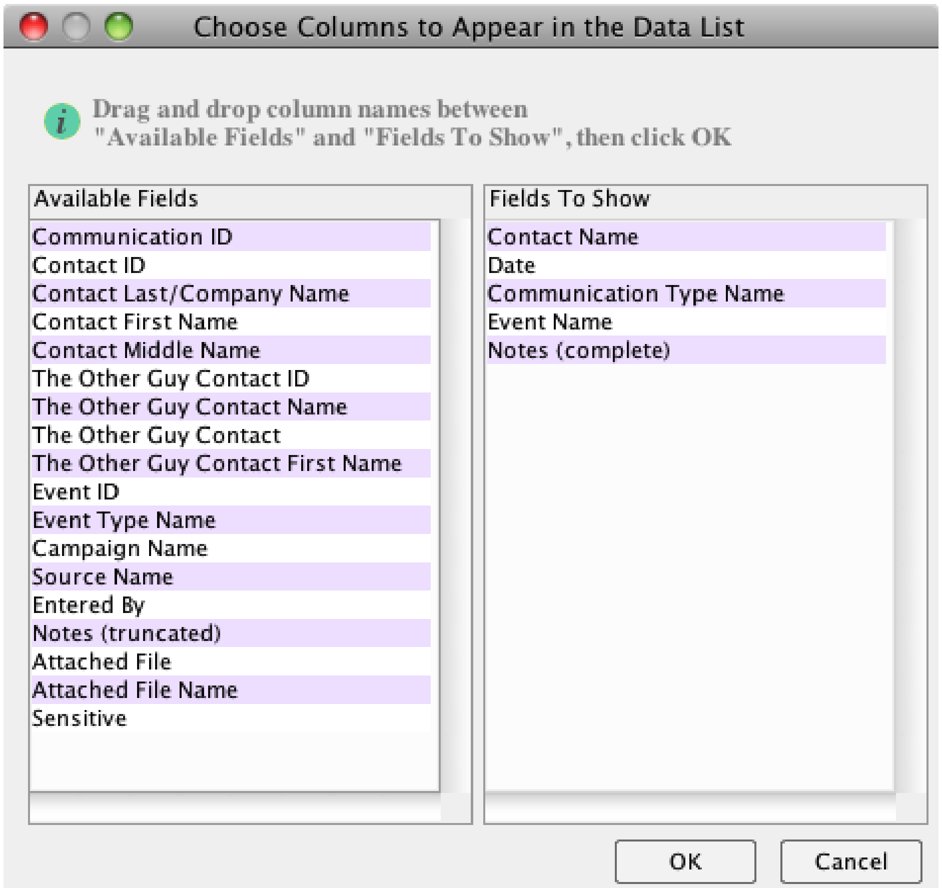
This picture shows three entries selected by using Control Click.



Note that the information bar at the bottom of the window indicates the number of selected items.

Dragging and Dropping in Lists

Some operations in Sumac ask you to choose fields to be imported, printed, exported, or displayed. For example, the list of CONTACTS allows you to click the column selection icon button, then choose which columns (fields) should be displayed. The dialog for choosing fields looks like this:



You choose fields by dragging them from the Available Fields list on the left to the Fields To Show list on the right. You can drag one field at a time. Alternatively, you can select multiple entries (see *Clicking To Select Entries In A List* on page 35) and drag them as a group.

Dragging can also be used to change the order of fields in the right hand list. An entry is put into the list immediately ahead of the one onto which it is dropped.

Right Clicking in Lists

If you right-click the list of records, a menu of commands appears. You can choose commands from this menu instead of from the command buttons on the left side of the list.

The commands that appear on the right-click menu are the enabled ones that are in the command buttons on the left side.

Buttons

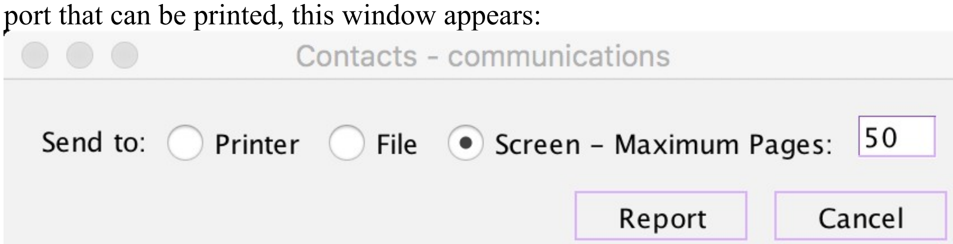
Buttons are used to perform special operations on the entries in a list. All lists have the following buttons.

Button	*Function*
New	Create a new entry in the list. For example, if you are looking at the list of COMMUNICATIONS, clicking this button lets you specify information about a new COMMUNICATION, adding it to the list.
Duplicate	Make a copy of the selected record, and present it for editing. When you click its OK button, the new record is saved to the database.
Delete	Delete the selected entries from the database. The entries that will be deleted by this command are the ones you have selected by clicking, as described above. Hint: You will be asked to confirm that you wish to delete the chosen entries before Sumac deletes any data.
Export	Export the information showing in the list. You are asked to choose the fields that you want to export. Data is exported to a tab-delimited (txt) or comma-separated (csv) text file that can be opened with any other program (e.g. a spreadsheet). The output file has titles in the first line and totals in the last line. Set the *open on completion check box* to have Sumac open the file with the default program on your computer when the export is completed.
Print	Print the information showing in the list. First you are asked if you want to print all or only the selected items in the list. Then you are asked to choose the fields that you want to print.
Select All	Select all entries showing in the list.

Some lists have additional buttons that are described in special sections below.

Analyze and Report

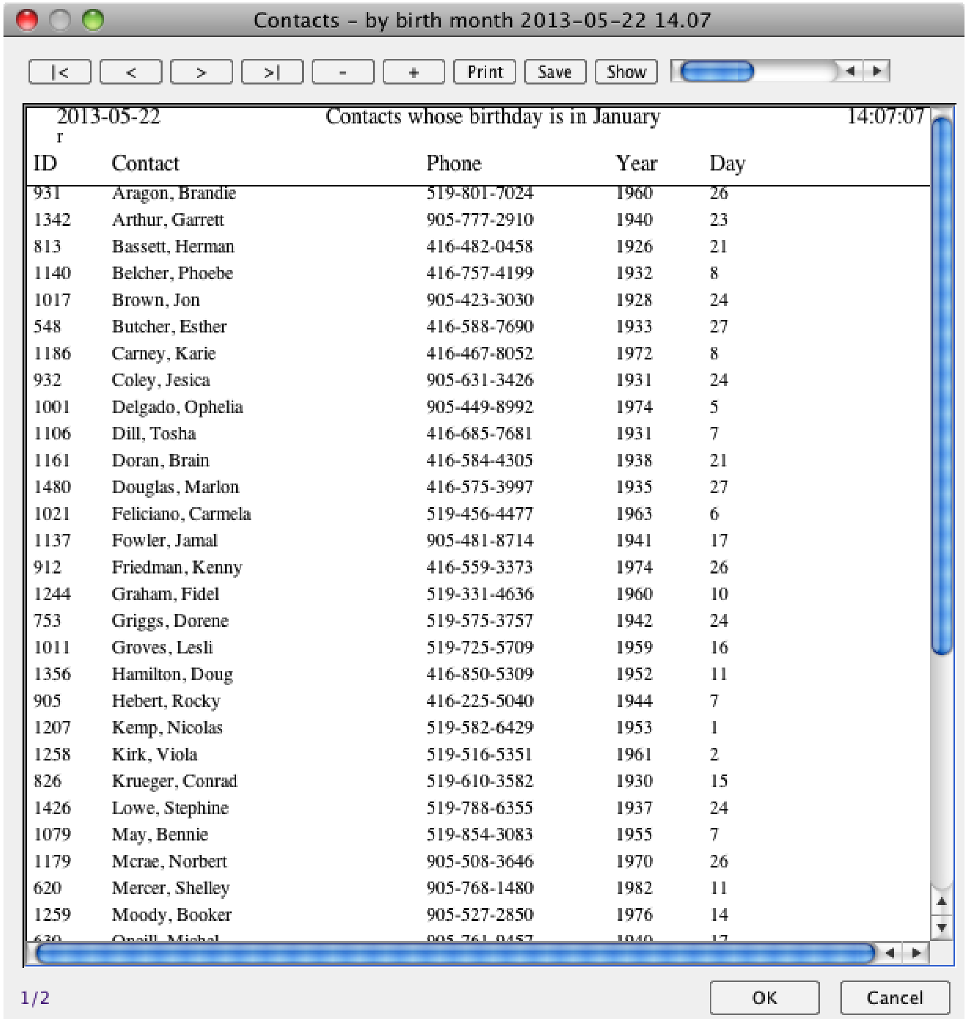
Sumac can produce many different reports. To see the list of available reports, click the Analyze & Report button in most list windows. When you select a report that can be printed, this window appears:



- ✔ Across the top of the window there are radio buttons that allow you to direct the output of the report to a printer, to a file, or to the screen. Click to choose where you want the report to go.
- ✔ Sumac then prompts you for any parameters needed for the report (e.g. dates or amounts). It then produces the report, sending it where you specified.

Preview Reports

If you send a report to the Screen, then this dialog appears, showing the chosen report:



2013-05-22 Contacts whose birthday is in January 14:07:07

ID	Contact	Phone	Year	Day
931	Aragon, Brandie	519-801-7024	1960	26
1342	Arthur, Garrett	905-777-2910	1940	23
813	Bassett, Herman	416-482-0458	1926	21
1140	Belcher, Phoebe	416-757-4199	1932	8
1017	Brown, Jon	905-423-3030	1928	24
548	Butcher, Esther	416-588-7690	1933	27
1186	Carney, Karie	416-467-8052	1972	8
932	Coley, Jesica	905-631-3426	1931	24
1001	Delgado, Ophelia	905-449-8992	1974	5
1106	Dill, Tosha	416-685-7681	1931	7
1161	Doran, Brain	416-584-4305	1938	21
1480	Douglas, Marlon	416-575-3997	1935	27
1021	Feliciano, Carmela	519-456-4477	1963	6
1137	Fowler, Jamal	905-481-8714	1941	17
912	Friedman, Kenny	416-559-3373	1974	26
1244	Graham, Fidel	519-331-4636	1960	10
753	Griggs, Dorene	519-575-3757	1942	24
1011	Groves, Lesli	519-725-5709	1959	16
1356	Hamilton, Doug	416-850-5309	1952	11
905	Hebert, Rocky	416-225-5040	1944	7
1207	Kemp, Nicolas	519-582-6429	1953	1
1258	Kirk, Viola	519-516-5351	1961	2
826	Krueger, Conrad	519-610-3582	1930	15
1426	Lowe, Stephine	519-788-6355	1937	24
1079	May, Bennie	519-854-3083	1955	7
1179	Mcrae, Norbert	905-508-3646	1970	26
620	Mercer, Shelley	905-768-1480	1982	11
1259	Moody, Booker	905-527-2850	1976	14

The horizontal scroll bar at the top of the window moves among the pages of the report. Here is what the buttons do:

Button	*Keyboard Equivalents*	*Function*
|<	Home	View the first page.
<	Page Up, left arrow, up arrow	View the previous page.
>	Page Down, right arrow, down arrow	View the next page.
>|	End	View the last page.
-		Make the page image smaller.
+		Make the page image bigger.

Button	Keyboard Equivalents	Function
Print		Send the report to a printer.
Save		Send the report to a tab-delimited text file.
Show		Show details about a CONTACT. When you click this button, you are prompted to enter the ID of the CONTACT of interest.

Produce an Age Group Report

When you produce a report showing contacts grouped by age ranges, you must specify the age ranges. You do this by providing a tab-delimited text file that defines the age groups. Each line in the file has two fields, separated by a tab:

- The first field is the low age in an age range.
- The second field is the high age in an age range.

Here is a sample file (→ represents a tab character which is invisible in most text editors):

```
0→    15
16→   30
31→   50
51→   120
```

Email a Report

At the bottom of many reports in Sumac is a *Send Email* button. Click this to email the report to a contact in your database. A window appears where you can indicate which addresses for Sumac to send to as well as a subject line for the email and communication type for Sumac to save.

Contacts and Their Donations

You may wish to create a list that shows selected CONTACT and DONATION information. Sumac provides many standard reports which show DONATION information chosen from various time periods arranged in various ways. If there is a standard report that does the job, then use it: it can be printed or saved to disk for further analysis.

If, however, no standard report quite does the job required, consider this general approach:

- ✔ Find the CONTACTS of interest. You can use the search panel in the CONTACTS list, or use Search Builder to construct a search that produces the desired list of CONTACTS. Then export the desired data using either the Export button in the CONTACTS list, or by performing a Mail Merge using a special-purpose template.
- ✔ If you use the Export button, you can export any fields in the CONTACT records. You can also export these special fields:
  - Amount of Last Donation – the value of the most recent DONATION by the CONTACT
  - Date of Last Donation – the date of the most recent DONATION by the CONTACT
  - Total of All Donations – the total of all DONATIONS ever made by the CONTACT
- ✔ If you choose to do a Mail Merge operation, you can get all the information available from an Export, plus one other field, c_date_range_donations[1], which provides the value of the CONTACT's

[1] You may also use c_date_range_donations_household. It works like c_date_range_donations but if the contact is a household then it includes donations made by the household members as

DONATIONS in a range of dates. A template file to produce this information might look like this (→ represents a tab character):
<<c_ID>> → <<c_Name>> → <<c_date_range_donations>>

✔ If you did a Mail Merge of all the chosen CONTACTS, using this template, and sent all merged results to a single file, you would have a file showing CONTACT IDs, names, and the amounts of their DONATIONS in a specified date range.

Information Bar

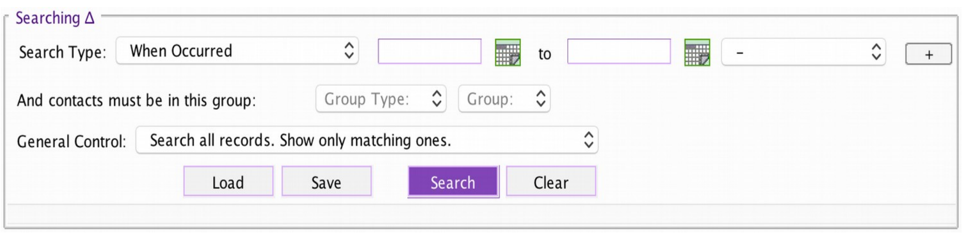
Under the buttons in each list window, there is a line of information. At various times, it can show three types of content:

Information	*Details*
Progress	If a long operation (e.g. exporting or deleting many records) is in progress, then it shows progress information – a thermometer bar or a numeric count.
Help	If you point at a field or button, the status bar shows help information.
Status	If neither Progress nor Help information is showing, then the status bar shows how many records are in the list. Some lists supplement this status information; for example, the DONATIONS list shows the dollar value of records in the list as well as how many there are.

Searching

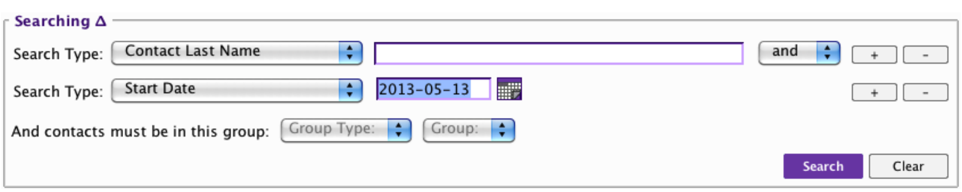
Most list windows have a search panel at the top. Specify the search criteria, then click the Search button to perform the search.

The examples here are taken from the search panel in the communications list. A searching panel at the top of a list looks like this:



Usually when the window opens, there is only one search criterion showing (Start Date). But you can use the Search Type drop-down menu to change it to search for something else, like a contact's last name.

You can add additional search criteria by clicking the + button:



well as those made by the contact itself.

Note that when you do this, buttons labelled "–" appear so that you can remove a search criterion too. Also, when there is more than one search criterion, there is a drop-down menu that shows *and*, *or* and *and not*. It lets you combine the searches together so that Sumac will find records that satisfy all of the search criteria (*and*) or at least one of the criteria (*or*).

For example, this search shows all communications of any one of three types:

Some list windows (like the Communications list) also allow you to restrict the search to find records that apply to contact in a group.

> Hint: The Search button can be activated by pressing the Enter key on your keyboard.

And Not Searches

An *and* search requires that records must match *both* the first *and* the second search criterion in order for the record to be found by the search.

An *and not* search is similar but it requires records to match the first search criterion but *not* match the second. For example, you could find donations last year (the first criterion) and not for a particular fund (the second criterion).

Combining And and Or Searches

If you have several search criteria and combine them with *and* and *or*, Sumac performs the searches in a specific way. The *and's* are done first, then combined using the *or's*. So a search with four criteria combined as follows:

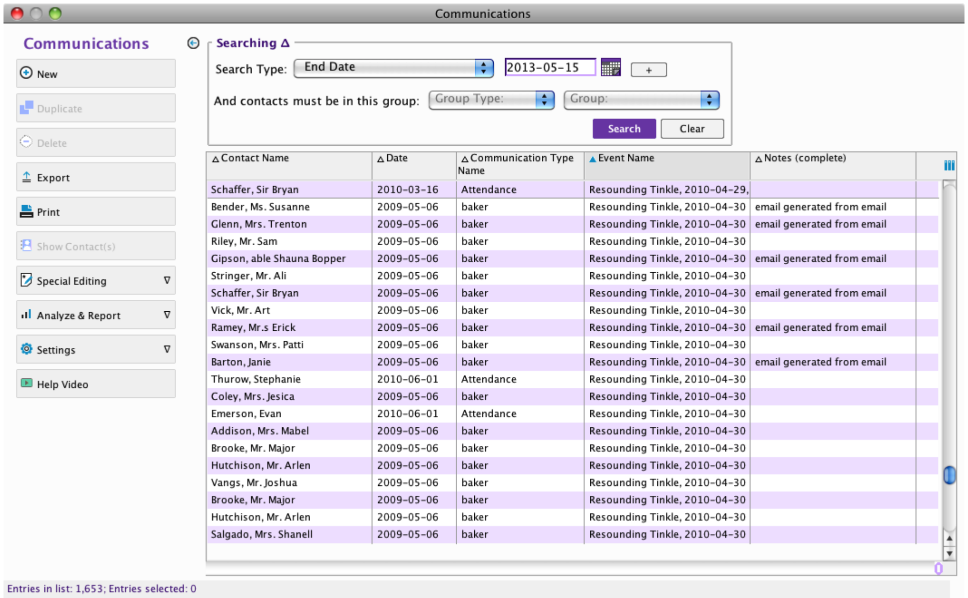
criterion A *and*
criterion B *and*
criterion C *or*
criterion D

finds all records that match all three of criteria A, B, and C, then it finds all the records that satisfy search criterion D and appends them to the list.

Keying To Auto-Scroll in The Sorted Column

If you click a column title to sort the contents of a list, you can then key in the first few letters (or digits) of a value that you want to find in that column. This is often faster than manually scrolling to find a specific value in a column, especially if the list is long.

For example, this list of COMMUNICATIONS has been sorted by Event Name. Typing the characters *re*, causes the list to scroll to COMMUNICATION records whose Event Name starts with *re* – this example goes to Resounding Tinkle:



Expand Icons

> Hint: On Windows computers, an expand icon is a plus sign, a contract icon is a minus sign. On Macintosh computers, an expand icon is a right-pointing triangle, a contract icon is a down-pointing triangle.

In some Sumac list windows, lines have an expand or contract icon at the left hand edge. When you click an expand icon, one of two things happens:

- The expand icon turns grey. This indicates that there is no additional information to show you.
- Additional lines of related information appear, indented, under the line whose expand icon was clicked, and the expand icon becomes a contract icon.

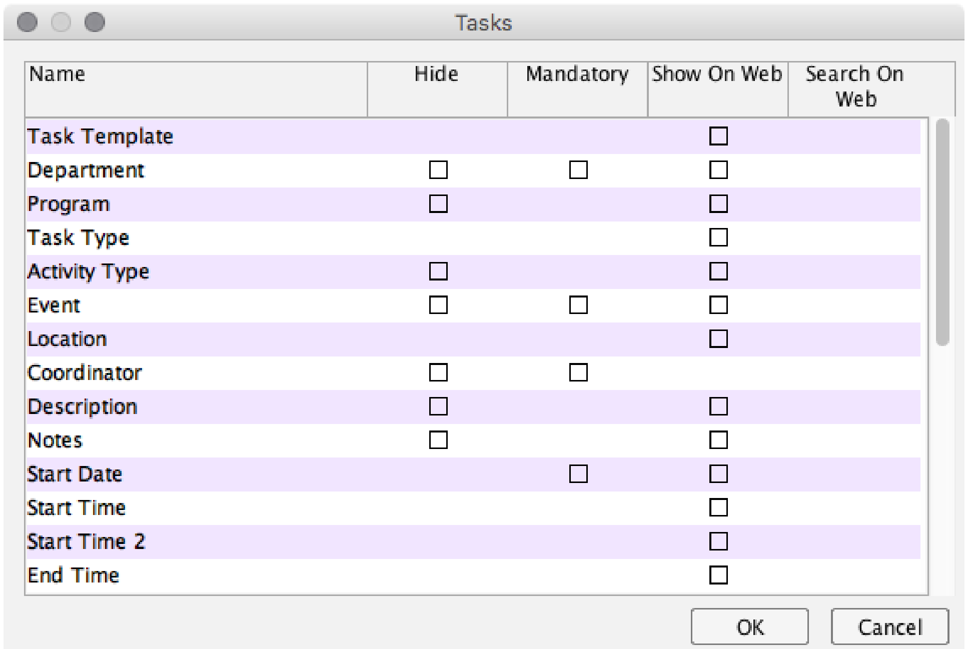
When you click a contract icon, the lines of information showing indented under the clicked line disappear, and the contract icon turns back into an expand icon.

Field Preferences

Sumac lets you customize records. You can:

- re-label fields
- completely remove fields from the user interface
- make fields mandatory, or
- determine which fields should appear or be searchable on a website.

Click Utilities/Customize Database/Field Preferences in the Sumac console to. Click to choose the type of record you wish to edit. You see a window like this:



Click to edit the name of a field.

Turn on the Hide check box if you do not want a field to appear in the user interface. You would do this because this field is not used by your organization.

If you want to make a field mandatory, turn on the check box in the Mandatory column.

Some types of records can be displayed on your website. For these records, you can click a check box in the Show On Web column to tell Sumac that a particular field should be displayed on your website.

Some web integration modules allow searching. Turn on the check box in the Search On Web column to indicate that a field is searchable from a website.

Awarding Grants

Sumac's Awarding Grants add on is used by organizations who provide awards to other organizations and individuals. Such awards can be in the form of grants, scholarships, fellowships, internships or competitions. The Awarding Grants area helps manage:

- The applications you receive
- Attachments to applications
- The judging process for the applications
- Tracking distribution of awards
- A Final report form

Set-Up

Setting up the Awarding Grants area of your database can be described as 3 main steps:

Before you are able to use the Awarding Grants area, you must set up a few important sections. The first step we recommend before proceeding is planning. This planning step takes place with any members of your organization who are involved in the grant process, and is not recorded in Sumac just yet. While planning, consider the type of data that is recorded in your grant process, and what type of reports you would like to be able to pull. In this stage, you should decide on which grant application types your organization will need, as well as all the forms that will be completed during the application, review and followup process.

Once you have completed the conceptual planning of your grant process, you are ready to start setting up your database. We recommend setting up your database in this order:

1. Create Forms for Applications, Reviews and a Final Report
2. Create Grant Application Types
3. Notifiers
4. Disbursements

Forms in Grant Applications

Sumac is able to hold forms submitted by the applicant and reviewers. In your current process, you likely have application and final report forms submitted by the applicant, and a review form submitted by the reviewer. In this section we provide guidelines and considerations for building these forms into your Sumac database.

Set-Up Forms for Grant Applications

Special Considerations for all Awarding Grants Forms

- Before you begin, go through your current forms and plan out what type of Sumac fields to use for each question.
  - When deciding which fields to use, understand that some fields may be long text, and some may be regular text.
  - You have a limited number of fields so make sure you do not use all of them in one form.
  - Consider how much text the user will enter to help you choose whether to use long, or regular text fields.
  - Check box groups use text fields, so this is important to consider when defining your fields and check box options.
- If you have the Sumac's Web Integration service, applicants and reviewers can submit forms online that are automatically loaded into your database.
- If you have multiple granting programs, then you need to create a separate set of forms for each grant type. (For example the Capability Grant would have its own set of forms, and the Merit Grant has it's own set.)
- Each form must have a flag field that prompts the user to indicate whether the form is complete.
- Be aware of the 'Show on Web' flag – if this is not set, the form does not show online.

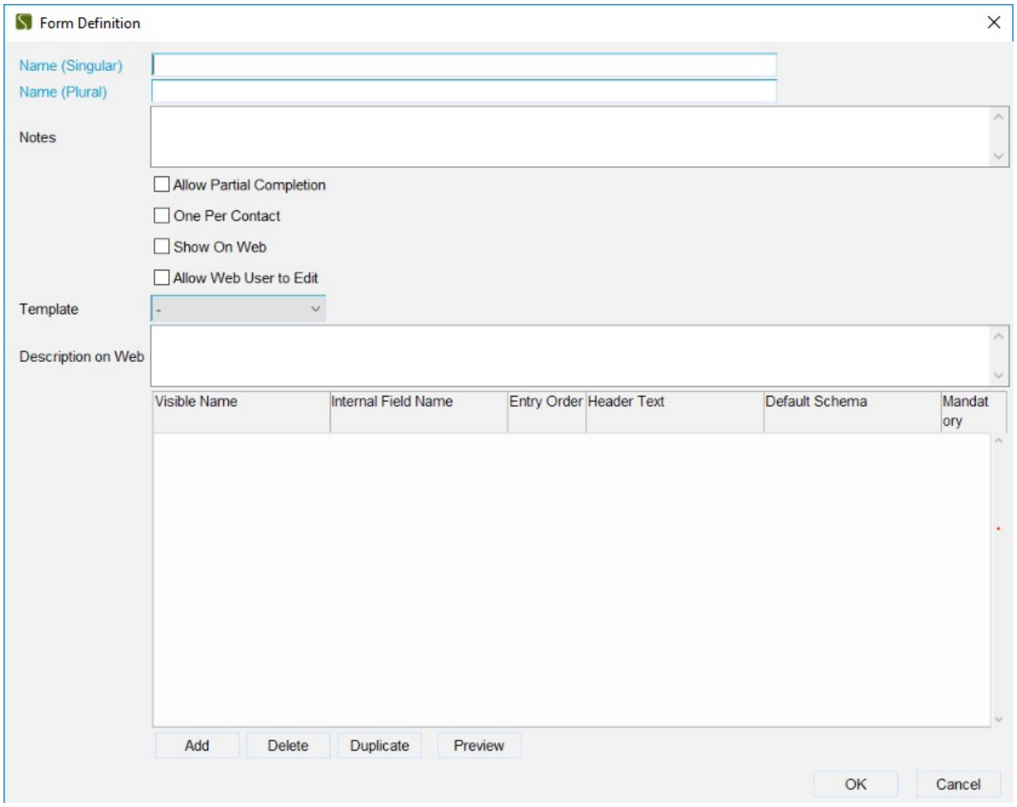
In the following section we discuss the forms required in order to create a Grant application. In most cases the intention is to have the applicant and reviewer submit forms online which load directly into your database, so the following instructions guide you to set up each form so that they show online. Here we cover further considerations for each form, as well as an overview of how they are used.

Step 1- Create a Form Definition

There are three forms you may use for any Grant Application Type:

- Application Form see (p. 52)
- Review Form, see (p. 53)
- Final Report Form, see (p. 55)

To create any form, you must open: Sumac Console/Utilities/Customize Database/Lookup Lists and select Area: Forms, and Lookup Lists: Form Definitions then click *New* on the upper left hand side of the window. The Form Definition window appears, and you can begin to define your form:



See the tables below for suggestions on how to fill out these fields in the context of setting up Awarding Grants forms:

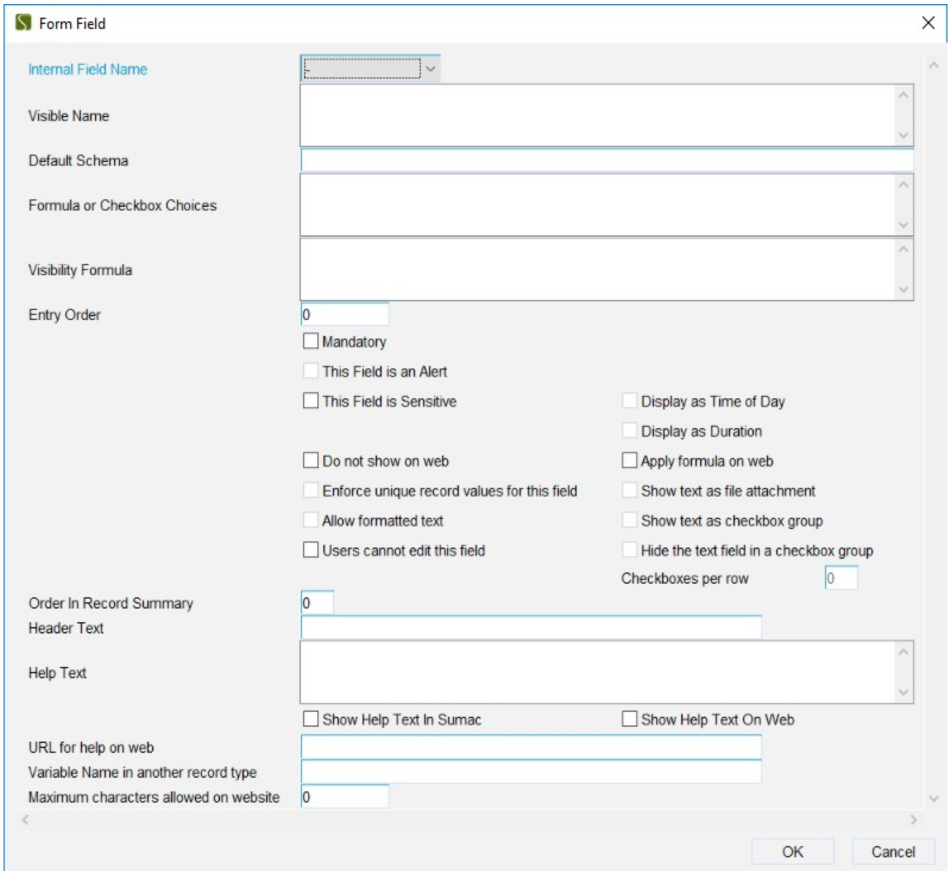
Field	*Description*
Name (Singular) and Name (Plural)	Use these fields to assign a name to your form.
Notes	This field holds any internal notes about your form. What you type here only appears in the Form Definition window.
Allow Partial Completion	Allows applicants/reviewers to submit the form without filling it out completely. Usually you do not want to receive incomplete forms, so we suggest not setting this checkbox.

Field	*Description*
One Per Contact	Means that the applicant would only be able to submit this form once. You may set this for application forms if you only allow one application per person, but it should not be set for reviewers, as they often review more than one application in their time at your organization. Keep in mind that if you plan to use this form for future years, you should not set this checkbox.
Show on web	Set this checkbox in order to have Sumac show the form on the web.
Allow Web User to Edit	If you want to allow applicants/reviewers to edit this form later on through your website then set this checkbox. That way, the applicant/reviewer can start filling out their form, then pause and log back in to finish filling it out at a later time. Usually you want to allow for this, so we recommend setting this checkbox.
Template	If you have a special email you want applicants/reviewers to receive after they're submitted their form, you can create a template for this message, and specify that as a template here. For example, if you would like applicants to receive a confirmation email after submitting their application online, specify the template you want Sumac to use for the confirmation email here. The template needs to be created before you are able to specify it here.
Description on Web	If you want special instructions to show within this form online, enter that text here. The text is then displayed at the top of your form on the web.

Use the buttons at the bottom of the screen to add, delete and duplicate fields as you require. Note that the Preview button only shows you a preview of what the form looks like in Sumac, not what it will look like online.

Step 2- Add Fields

To add a new field to a form, click *Add* within the Form Definition window. The following window appears:



See the tables below for suggestions on how to fill out the Form Field dialog in the context of setting up Awarding Grants forms.

Field	*Purpose*
Internal Field Name	The Contact field links this form to a specific contact record in your database. Sumac automatically creates a field to hold to applicant's name, so you do not need to. It is unlikely that you would need to add any other Contact fields to an application form.
Visible Name	
Formula/checkbox choices	Sumac does not perform formula calculations on the web, so do not use this field for this purpose. However, if you want to create a check box group with multiple selections, you can specify the check box choices here, with each check box choice separated by semi-colons. Once you have entered your checkbox choices, set the checkbox "Show text as checkbox group".

Field	*Purpose*
Visibility Formula	Sumac does not perform formula calculations on the web, so you do not need to enter anything into the Visibility Formula field.
Entry Order	Controls the order in which these fields will appear in your form. We recommend using increments of 5 or 10 for entry order so that you leave room for yourself to adjust fields in this form down the road.
Header Text	In many application forms, there are multiple sections of the form that applicants must fill out. For example, you may have an initial section that captures overall general information about the applicant, a secondary section that captures details specific to why they are requesting funding, and a final section that captures information on how they plan to use the funding if they're awarded. You can create these sections for your forms by specifying the name of each section as Header Text here. You only need to specify the header text for the first field that will appear in each section.
Maximum characters on web	This field allows you to specify a maximum number of characters your applicants can enter into this field when filling out this form online. For example, Long Text fields in Sumac can hold up to 20,000 characters, but you may want to limit your applicants to only 5000 characters.
Help text (and relevant check boxes)	You are able to add help text here that shows for the user completing this form. If you set "Show Help Text on Web" it appears as text above the field on the web, and if you set "Show Help Text in Sumac" it appears when the user hovers their mouse over the field in the Sumac database.

Field	*Purpose*
URL for help	Some organizations create web pages with extra instructions to their applicants. If you would like Sumac to show a link to any particular web page beside a response option, paste the URL for that page into this field. This results in an icon beside the field on the form that when clicked, opens the page in a new tab in the user's web browser.

It is a good idea to make note of the internal names of the fields you put in your form. Specifically, we recommend writing down the field you use for "Amount of funding requested" and "I confirm this form is finalized". These field names will be used later on in your grant build process.

Consider what kind of reports you would like to run during and after the application and review process. If you would like to be able to pull basic statistics from your forms such as "How many applicants applied for over $1000.00" or "How many applicants selected this check box over the other" then your forms should contain different fields than if you would like to answer questions like "What is the long term plan of each individual applicant?" The Forms area of Sumac is able to perform simple counts on form fields to help you analyze your data at a basic level afterward. So if you are looking for numerical data, it is recommended to use fields that have static answer options, such as yes or no (e.g. use Count fields, Lookup Lists, Flags, etc.).

Text fields allow the user to enter whatever they like into the field, so later, Sumac is not able to interpret the text and turn it into a number or statistic. For example, if 10 applicants complete the question "How do you plan to use this money" in a text format, there is no way to assign numbers to their answers. However, if the applicants respond to this question by using an option from a drop down menu or check box group, then the responses are fixed and not variable. When you are collecting the data, Sumac is then able to count how many applicants chose each possible option. Generally, fields with set responses are quantifiable, and fields that allow open responses are not.

Field Types

Field Type	*Purpose*
ContactID	This type of field holds a chosen contact's name. There is a Contact ID field automatically assigned to every form, but if you would like to attach more than one contact to a form, you must add them here. The Contact field links this form to a specific contact record in your database. Sumac automatically creates a field to hold to applicant's name, so you do not need to. It is unlikely that you would need to add any other Contact fields to an application form.
When	This is a date field holds a date.

Field Type	*Purpose*
Amount	Text field that can hold a number with decimals, typically a currency amount.
Colour	Drop down menu of colour names.
Count	Text field that must hold an integer, but does not accept decimal points.
LookupID	A drop-down menu of choices specifically built by you in lookup-lists.
Event	Introduces a field where the user is able to choose an event from an existing list.
Donation	A link to a donation record.
Membership	A link to a membership record.
Text	A text field that can hold both alphabetical and numeric values, as well as punctuation.
Long Text	A long text field that can hold both alphabetical and numeric values, as well as punctuation. Long text fields support a scroll bar and can hold up to 20,000 characters of data.
Flag	A single check box field.
Payment	A link to a payment record.
Schema	Schema fields are similar to lookup lists, except that they are multi-level or hierarchical. The values in the first level choice limit the values in the second level choice, and so on.
CampaignID	A link to a campaign.

Form Types

As we have mentioned above, there are 3 types of forms that you may set up to use with the Awarding grants area. See the descriptions for each form type below.

Application Form

The application form is completed by your applicant in order to apply to your organization for funding. The purpose of this form is for the applicant to provide any information that you may need in order to judge their eligibility to win the grant. You may have fields in this form that ask about purpose of the grant, amount requested, and intended usage. The form can hold anything else that is relevant to their application, along with mandatory fields such as an amount field. This form may be one that you already have on your website for applicants to fill out and submit online, or in a PDF or paper copy. It is best to use a current form as a guide when building this into Sumac.

Mandatory and Recommended Fields

When you are creating an Application form in Sumac, a few fields are required. This is because certain aspects of the Grant Application Type record use fields in the Application form to dictate actions. For example, a “complete” check box will change the application status from “In Progress,” to “Submitted.”

Field	*Action/Result*	*How is it used in the Grant Application*
Amount	Amount of funding the applicant is requesting. Mark this field as mandatory	Note: even if the organization doesn't want the applicant to fill in the amount they want, they have to include this as a field in the Form and set it here in the Grant Application Type. They can choose not to show that field on the web to the applicant. The same applies for the "final" field. Write down which Amount field you use for this option (E.g Amount7) because you will need to use this information when defining your grant application type.
Flag	When the applicant sets this checkbox, they indicate that they have reviewed the application and that the submission is final. This should be the last field in your form, and it should be Mandatory.	Write down which flag you use for this checkbox (E.g Flag7) because you will need to use this information when defining your grant application type. If this checkbox is not set by the applicant, then Sumac leaves the application status as "In-Progress".

Most application forms have fields for demographic details, like the grantee's address. In Sumac, these pieces of information are stored in the contact record for the applicant, so you usually don't need to add fields for those items.

Review Form

After your organization receives applications for funding, you may have a team of people who review the application received to determine which applicants will be awarded funding. These reviewers could be board members, or other staff who you've assigned to this role. You should build this form to allow your reviewer to assess the application. This form should include fields that ask the same questions you cover during your review process. When reviewing a form online, or in the database, the reviewer is able to view the application, as well as the corresponding attachments all in one place.

In the recommended fields below, we describe a form where reviewers rank many sections of an application, then have Sumac tally the score for the whole application. If your review process only has reviewers rank the application as a whole, then disregard the formula section.

Some organizations may also want their reviewers to go into more detail and add comments about what they thought of each application. Other organizations may want their reviewers to answer a number of Yes or No questions for each application, like “was the application completed in full?”. Whatever the case is for your organization, add the fields you feel are relevant for your reviewers to consider.

Field	*Action/Result*	*How is it used in the Grant Application*
Count	Include a count field for each section that you would like the reviewer to rank. The count field can only hold a numeric value, and can only be used for numeric ranking. If you have 4 separate sections on the application form and you want them each to be considered separately, then add 4 count fields to the review form. Ensure you give a visible name to each field that will indicate to the reviewer which section of the application this field applies to (e.g. “Section 1 Score”). It is a good idea to make these fields mandatory so the reviewers do not accidentally submit their reviews without assigning a score. Keep note of the internal name of the fields you used for each section if you are looking to build a total score formula.	Sumac uses this to calculate the rank your reviewers gave each applicant.

Field	*Action/Result*	*How is it used in the Grant Application*
Flag	When the reviewer sets this checkbox, they indicate that they have reviewed the application and that the review they're submitting is final. At this time, you can move on to the next stage of this process: assessing all the reviews and scored for each application to determine which applicants will be awarded funding. This should be the last field in your form.	Write down which flag you use for this checkbox (E.g Flag7) because you will need to use this information when defining your Grant Application Type.

Final Report Form

After you have awarded funding, you may have your award winners report back to your organization to describe how the funding was spent. To ease your ability to collect each award winner's final report, you may wish to have your award winners send in their report online. This report is meant to give you insight into how the applicant is using the funding, but will not make a large impact into how Sumac treats the application type.

If you do not require award winners to report back to you after they received funding, you do not need to create a Final Report form. However, if a Final Report is necessary after you've awarded funding, continue reading this section.

Please note that the final report form is limited. You can only have one final report per application. You cannot have staggered final reports where an applicant would report multiple times throughout the year after funding, for example.

Mandatory and Recommended Fields

Field	*Action/Result*	*How is it used in the Grant Application*
Flag	When the grant winner sets this checkbox, they indicate that they have completed their final report form and that their submission is final. This should be the last field in your form.	Write down which flag you use for this checkbox (E.g Flag7) because you will need to use this information when defining your Grant Application Type.

Grant Application Types

The Grant Application Type holds information that is specific to a particular grant. The definitions set here define different rules and components for the entire granting process for a particular type of grant. For example, which forms will be used for applications, reviews and final reports, how many reviewers will be assigned for a particular type of grant, etc. This information includes, but is not limited to:

- Accounts you are using for the grant
- Which forms are tied to this grant
- Contact types who are able to apply
- Dates
- Who your reviewers are

A new Grant Application Type should be created for every iteration of a granting program. This means that if you have an annual scholarship program, you should create a new Grant Application Type every year. By creating a new Grant Application type each year, you are able to track and report on past years separately from other year.

Note: though you should create a new Grant Application type each year, you can re-use the Application Form, Review Form, and Final Report Form from previous years if no changes are needed here.

Your organization may also offer more than one type of grant per year, so this is also an instance where you create more than one Grant Application Type. Applicants are then able to apply to your different grants, and the applications and related information are then sorted in Sumac based on the Grant Application Type. For example, when you create four types of grant applications, an applicant may apply to two of them. You can then look in your application list for one specific type of grant, to see all applicants.

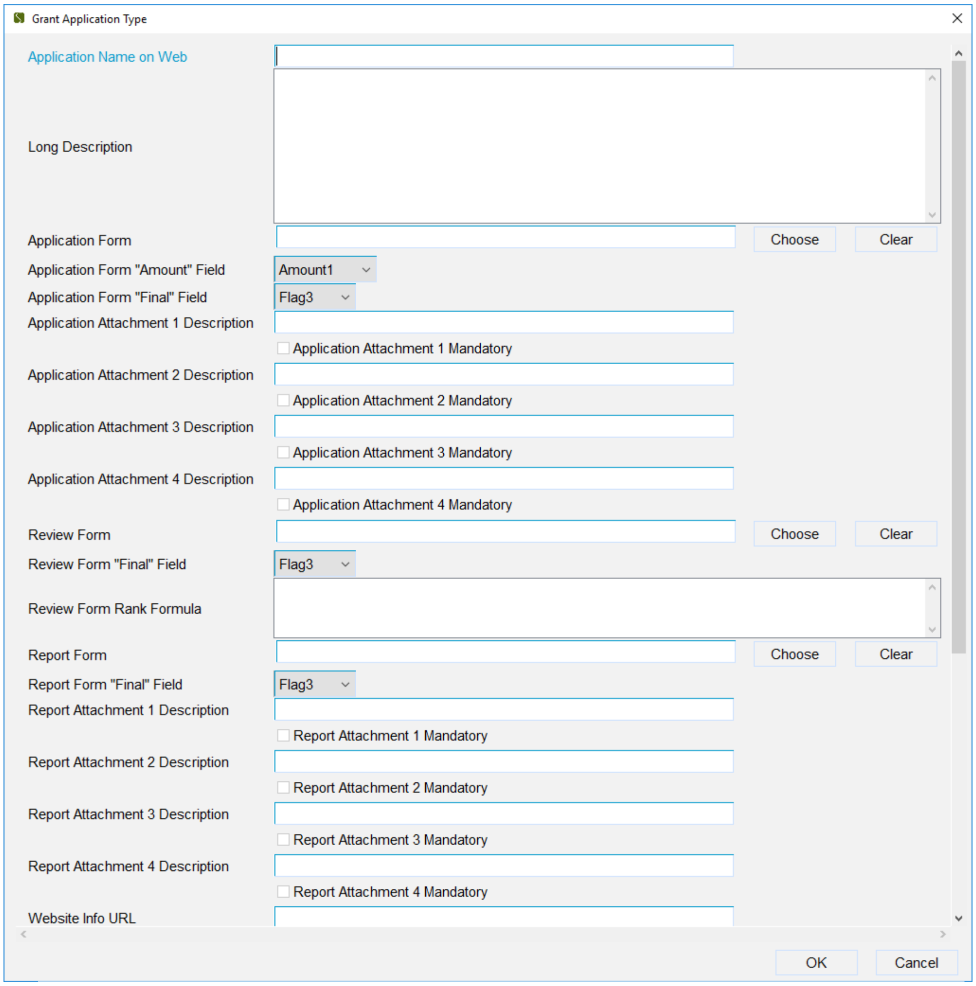
Grant Application Types must be configured before anything can go live on the web. You can have multiple live Grant Application Types on the web at the same time. It is usually best to set everything up in Sumac first, and test it internally. Then, when you have created a few test submissions, set the 'Show on Web' flag and you're ready to make this grant available online.

Set-Up Grant Application Types

Before you are able to define your application types, ensure you have set up forms for your applications. Each application normally consists of the following forms:

- An Application form- To be submitted by the applicant. See page 52.
- A Review Form- To be submitted by your reviewers. See page 53.
- A Final Report Form- To be submitted by the award winner after they have received funding. See page 55.

To create a Grant Application Type, open Sumac Console/Utilities/Customize Database/Lookup Lists/Area: Awarding Grants/Lookup Lists: Grant Application Types. This window appears:



When you are defining your Grant Application Type, you need to consider each of the following fields:

Field	*Meaning*
Application Name on Web	This is the name of the Grant that will appear online, and in the Sumac database.
Long Description	This is an internal field where you can put more detailed information about this Grant Application Type. This description does not appear on the web.
Application Form	Use this field to set which form will be used for applications to this grant.
Application Form “Amount” Field	This tells Sumac which field in the Application form holds the Amount an applicant is asking for.

Field	*Meaning*
Application Form “Final” Field	This tells Sumac which field in the application form identifies the application is complete. This checkbox changes the application status from “In Progress” to “Under Review”.
Application Attachment 1-4 Description	Use this field to specify the name or description of a file an applicant should attach to their application. When you specify the name or description for an attachment, that causes the attachment field to become available online and in the Sumac database. The field for attachments does not show if you do not give it a name. Common examples of attachments to grant applications are Resume, Budget, Essay, or Letter of Support. You have a limit of 4 attachments per application. Attachments can be a maximum 5 MB in size.
Application Attachment 1-4 Mandatory	If this checkbox is set, the attachment is mandatory, so an applicant is only able to submit their application once they have attached this file. If your organization does not require attachments from the applicant, you may omit this step.
Review Form	Use this field to set which form will be used for reviews of applications to this grant.
Review Form “Final” Field	Use the drop down menu to indicate which Flag field in your Review Form a reviewer sets to indicate their review is complete. This checkbox also affects application status so when this check box is set in every submitted review, then Sumac automatically changes the application status to *Review Complete*.

Field	*Meaning*
Review Form Rank Formula	Can hold a formula that computes the rank or score an application receives based on fields the reviewer has filled out in their review forms. Some organizations just build the final score into a formula within the form itself, as we show in our Setting up Review Forms how -to video. In this case, this just needs to refer to the field that holds the score. However, some organization may not want an individual reviewer to be aware of how different sections of an application are weighed, or how the overall score for the review is calculated when they fill out their reviews. If this is the case for your organization, you can build the Review Form Rank Formula into this field here rather than building it into the Review Form itself. That way, you can ensure that your reviewers are able to score different section of the application, but not able to see how the overall score is calculated. To have the total of all your fields use the following formula (Count field internal name 1)+(Count field internal name 2)+(Count field internal name 3) … etc until you have included all the rank fields in your Review Form. So for example if you used Count3, Count4, and Count5 as rank fields in your Review Form, your Formula or Checkbox Choice field would contain this equation: Count3+Count4+Count5 If you would like Sumac to calculate the average of these fields, then your formula would be the same as above, but divided by the number of scores you are dividing. The formula in the Formula or Checkbox Choice field would look like this: (Count3+Count4+Count5)/3. If you have 4 count fields that you are including, then divide it by 4.
Report Form	Use this field to set which form is the Report Form for this Grant

Field	*Meaning*
Report Form “Final” Field	This tells Sumac which field in the Report Form indicates that the report is complete. This checkbox also affects application status so when this check box is set, then Sumac automatically changes the application status to “Report Completed”.
Report Attachment 1-4 Description	Use this field to specify the name or description of a file an award winner should attach to their Final Report. When you specify the name or description for an attachment, that causes the attachment field to become available online and in the Sumac database. The field for attachments does not show if you do not name the attachment. Common examples of attachments for Final Reports are things like a Final budget, improvement reports, etc.
Report Attachment 1-4 Mandatory	If this checkbox is set, the attachment is mandatory, so an award winner is only able to submit their Final Report once they have attached this file. If your organization does not require attachments to final reports, you may omit this step.
Website Info URL	The website info URL field can hold the URL of some HTML text that will appear in a separate tab when an applicant clicks to get more details about this type of grant. This is not a mandatory field, so if you do not have additional HTML text you want displayed, you do not need to use this field.
Show on Web	Set this check box to make the Grant Application Type show as an option in your Grant Applications web page.
Do not show applicant names to reviewers	This hides the name of the applicant from the reviewer. This ensures that all applicant names remain anonymous to reviewers.
Review Due Date	This shows up online for the reviewers to see.

Field	*Meaning*
Reviewer 1-6	If you always have the same contacts reviewing every single application you receive, you can indicate each reviewer here. That way, each time a new grant application is received, Sumac automatically sets these contacts as reviewers. This field is not mandatory. If you leave these fields blank, you may later manually assign reviewers to each application.
Hide Reviewer 1-6	Set this check box to have Sumac hide the reviewer field from the Grant Application record. This can be used in the case that you do not use all 6 reviewer fields and do not want to see them on the grant application record.
Accounting Fields	Sumac is set up to hold accounting information, create ledger entries, and handle accrual accounting. If you need Sumac to track the account codes for each grant application type, set them here.

If you plan to integrate Grant Application financial with your accounting system, you must specify your accounts in Sumac Console/Utilities/Customize Database/ Lookup Lists/ Area: Awarding Grants/ Lookup Lists: Accounts before proceeding to set up your Grant Application type.

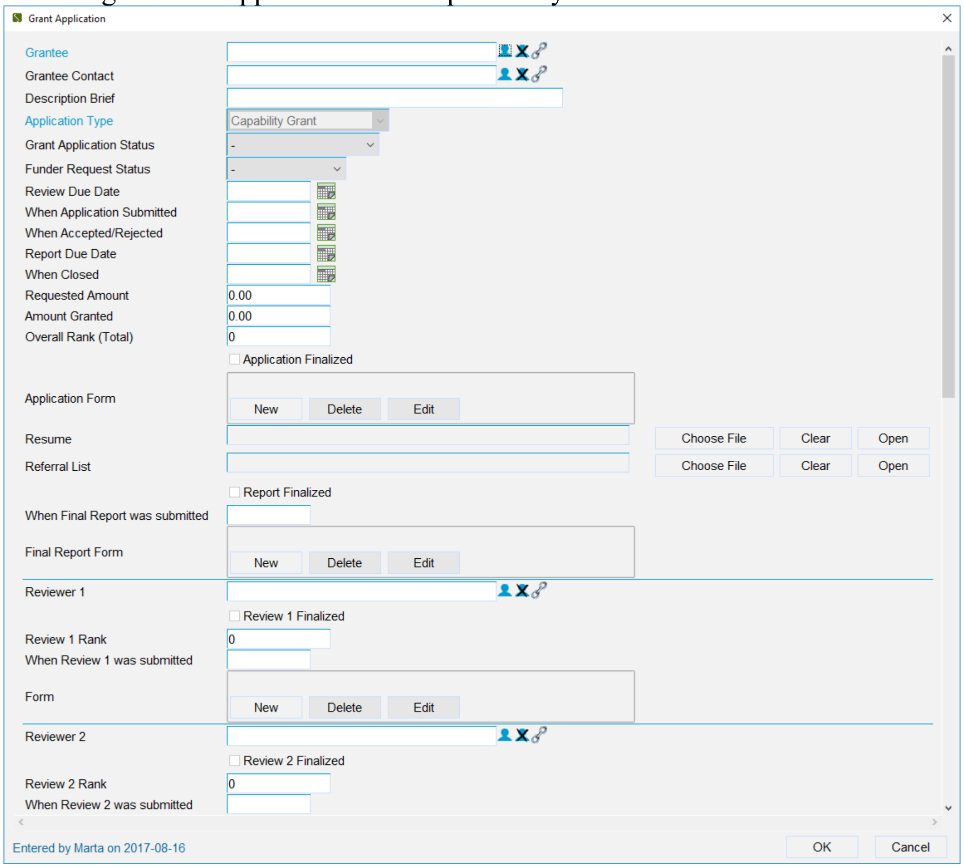
The Grant Application Record

The Grant Application record captures all the details of an individual application. This means that you are able to see the Application form, Review form, and Final Report form all in one place. Each Grant Application record is one instance of a contact's application for your grant, and is subsequently linked to a Grant Application Type and to the Contact Record of the applicant. For this reason, you must have grant application types set up before you are able to create, or view application records.

The Grant Application List is the window you go to to view all of your grant applications in one place. Here you are able to sort, search and report on any grant application. In order to begin working with this list, you must first understand the workings of an individual Grant Application Record.

View a Grant Application Record

To view an existing Grant Application Record, or to open a new one, you must first open the Grant Applications List (Sumac Console/Grant Applications). To create a new record, click New on the upper left corner in the list. To open an existing record, double click any record displaying in your list. Note that you can also access a record directly from an Applicant's Contact record, via their History. You are also able to add a new Grant Application record to the selected contact from the Grant Application list. Either method you choose to use when accessing a Grant Application record presents you with a window like this:



The fields with blue descriptions are mandatory fields that must be filled out in order to save a Grant Application record. The other fields can be completed as the application process progresses. As the forms are completed by your applicant and reviewers, Sumac uses some of the information to set certain fields in the record automatically. See the table below for a complete list of the fields in a Grant Application Record, and a description of each field.

Field	*Description*
Grantee	This is the person or organization who applies for the grant. Note that you can hide or rename this field in Sumac Console/Utilities/Customize Database/ Field Preferences/Grant Application.

Field	*Description*
Grantee Contact	In the event there is a specific person at the applying organization that you should be in contact with, enter them in this field. For example, while the Grantee (mentioned above) may be an organization, you might want to capture the name of the individual person at the Grantee organization who is responsible for the application. Note that you can hide, rename or set this field as mandatory in Sumac Console/Utilities/Customize Database/Field Preferences/Grant Application.
Description Brief	Use this field if you wish to write a brief description about this particular application. This description only appears within the Sumac database.
Application Type	You are not able to modify this field. Sumac forces you to choose an application type before it allows you to open a new Grant Application record. This just serves to display which type you are viewing.
Grant Application Status	This is an intelligent field that Sumac sets for you depending on certain rules.
Funder Request Status	Use this field as an internal status for grant application status. Remember, the Grant Application Status is not customizable, and updates automatically based on certain rules. If you have your own internal statuses you want to assign to applications, use this field to define and assign those statuses as needed. Note that this field is the same field as in the Grant Management module, so if you are using both Awarding Grants, and Grant Management, while you can use this field in both places, we recommend carefully considering the how you customize the status options, so they can be applied to either granting area.
Review Due Date	If this is set, it will appear online for the reviewers

Field	*Description*
When Application Submitted	Sumac automatically fills in the date the application was submitted as soon as the applicant submits their application online. It can also be set manually.
When Accepted/Rejected	You can manually specify the date when the application has been accepted or rejected.
Report Due Date	You may manually set a date that specifies when the applicant's final report is due. When you set this date, it automatically appears online on the applicant's profile.
When Closed	You can manually specify the date when the application has been closed.
Requested Amount	Populates with whatever value the applicant puts in the field identified in the "Amount Requested" field in the Application Form. If you hid this field from applicants so they are not able to input information, then you must set this manually.
Amount Granted	Use this field to indicate the amount of money granted to the successful applicant.
Overall Rank (Total)	This field shows you the overall rank of all the reviewers for this application.
Application Finalized	This field displays whether the applicant set the checkbox in their application that indicates it is complete. The information for this field is directly pulled from the Flag field you identified as holding the finalize checkbox in the application form.
Application Form	This field stores the application form the grantee has filled in online. Sumac users, depending on their privileges for forms may be able to create a new form, or delete or edit the current one.
Attachment Fields	If there are any user defined attachments in the Grant Application Type, they will appear here.

Field	*Description*
When Final Report was submitted	Sumac sets this field automatically as soon as there is a submitted Final Report form which also has the "Finalized" flag set. Can also be set manually.
Final Report Form	This field stores the Final Report form the grantee has submitted online. Sumac users, depending on their privileges for forms may be able to create a new form, or delete or edit the current one.
Reviewer 1-6	If the administrator set contacts in the Grant Application Type as Reviewers, then Sumac automatically shows them here. If not, you can set Reviewers here manually. The Sumac administrator may also choose to hide some or all of the Reviewer fields when defining the Grant Application Type.
Review 1-6 Rank	Based on Reviewers answers, and the formula used, the rank or score a Reviewer has assigned to this application resides here. It is displayed as a numeric value.
When Review 1-6 was submitted	This field shows you the date when each particular review was submitted.
Form	Using the buttons beside this field, you may either create, view or edit a review form.
Application Notes	Note that you can hide, rename or set this field as mandatory in Sumac Console/Utilities/Customize Database/Field Preferences/Grant Application.
Review Notes	Note that you can hide, rename or set this field as mandatory in Sumac Console/Utilities/Customize Database/Field Preferences/Grant Application.

Grant Application Status

The Grant Application status is a drop down menu field that appears in a Grant Application Record, and online when a reviewer or applicant are reviewing their applications. The status drop down menu is one of the few lookup lists that cannot be changed by a Sumac user. This is because Sumac uses this menu in a meaningful way, and helps you see the progress of each individual Grant Application Record. Below is a table that describes each status in the list, and the scenario in Sumac that prompts a manual or automatic change of record status.

Grant Application Status	*How This Status is Set*
In Progress	a. Sumac user selects it from the lookup list in the Grant Application Record. b. Web user fills up an application form partly by clicking Continue Editing later. Resulting Grant Application record in Sumac has this status. **Web user – Grantee:** In the Grant Review – Grantee web page, for the logged in Grantee the Application appears in the Grantee's table 'Ongoing Applications' with a Current Status of 'in progress'
Under Review	a. Sumac user selects it from the lookup list in the Grant Application Record. b. Sumac user edits the not finalized Application Form in the record and marks it as complete. c. Sumac user edits one of the reviewer forms in the submitted Grant Record and marks it as not final d. Web user submits a completed Application Form online. Resulting Grant Record in Sumac has this status. **Web user – Reviewer:** In the Grant Review – Reviewer web page, for the logged in Reviewer the assigned Application will appear in the Reviewer's table 'For Your Review' with a Current Status of 'ready to review' if the review has not been started. If the review was submitted but Grant Record is still Under Review (other reviewers yet to submit), Application will appear in the 'Submitted Reviews' table with a Current Status of 'submitted' **Web user – Grantee:** In the Grant Review – Grantee web page, for the logged in Grantee the Application appears in the Grantee's table 'Active Applications' with a Current Status of 'under review'
Review Completed	a. Sumac user selects it from the lookup list in the Grant Application Record. b. All assigned reviewers submit their completed review form online, by logging in to their Reviewer web user account. The Grant record in Sumac has this status. **Web user – Reviewer:** In the Grant Review – Reviewer web page, for the logged in Reviewer the assigned Application appears in the Reviewer's table 'Submitted Reviews' with a Current Status of 'reviews completed' **Web user – Grantee:** In the Grant Review – Grantee web page, for the logged in Grantee the Application appears in the Grantee's table 'Past Grant Applications' with a Current Status of 'reviews completed'

Grant Application Status	*How This Status is Set*
Reject	a. Sumac user selects it from the lookup list in the Grant Application Record. **Sumac Record:** The When Accepted/Rejected field is filled with the date this status was set. **Web user – Grantee:** In the Grant Review – Grantee web page, for the logged in Grantee the Application appears in the Grantee's table 'Past Grant Applications' with a Current Status of 'rejected'. Grantee cannot edit the Application form. **Web user – Reviewer:** In the Grant Review – Reviewer web page, for the logged in Reviewer the assigned Application appears in the Reviewer's table 'Submitted Reviews' with a Current Status of 'rejected'. When opening the Application, Reviewer can see a non-editable view of the Application form, and the Review form (if submitted).
Reject Notified	a. Sumac user selects it from the lookup list in the Grant Application Record. **Sumac Record:** The When Accepted/Rejected field is filled with the date this status was set. **Web user – Grantee:** In the Grant Review – Grantee web page, for the logged in Grantee the Application appears in the Grantee's table 'Past Grant Applications' with a Current Status of 'rejected'. Grantee cannot edit the Application form. **Web user – Reviewer:** In the Grant Review – Reviewer web page, for the logged in Reviewer the assigned Application appears in the Reviewer's table 'Submitted Reviews' with a Current Status of 'rejected'. When opening the Application, Reviewer can see a non-editable view of the Application form, and the Review form (if submitted).

Grant Application Status	*How This Status is Set*
Accept	a. Sumac user selects it from the lookup list in the Grant Application Record. **Sumac Record:** The When Accepted/Rejected field is filled with the date this status was set. **Web user – Grantee:** In the Grant Review – Grantee web page, for the logged in Grantee the Application appears in the Grantee's table 'Active Grant Applications' with a Current Status of 'accepted'. Grantee cannot edit the submitted Application form **Web user – Reviewer:** In the Grant Review – Reviewer web page, for the logged in Reviewer the assigned Application appears in the Reviewer's table 'Submitted Reviews' with a Current Status of 'accepted'. When opening the Application, Reviewer can see a non-editable view of the Application form, and the Review form (if submitted).
Accept Notified	a. Sumac user selects it from the lookup list in the Grant Application Record. **Sumac Record:** The When Accepted/Rejected field is filled with the date this status was set. **Web user – Grantee:** In the Grant Review – Grantee web page, for the logged in Grantee the Application appears in the Grantee's table 'Active Grant Applications' with a Current Status of 'accepted'. Grantee cannot edit the submitted Application form **Web user – Reviewer:** In the Grant Review – Reviewer web page, for the logged in Reviewer the assigned Application appears in the Reviewer's table 'Submitted Reviews' with a Current Status of 'accepted'. When opening the Application, Reviewer can see a non-editable view of the Application form, and the Review form (if submitted).

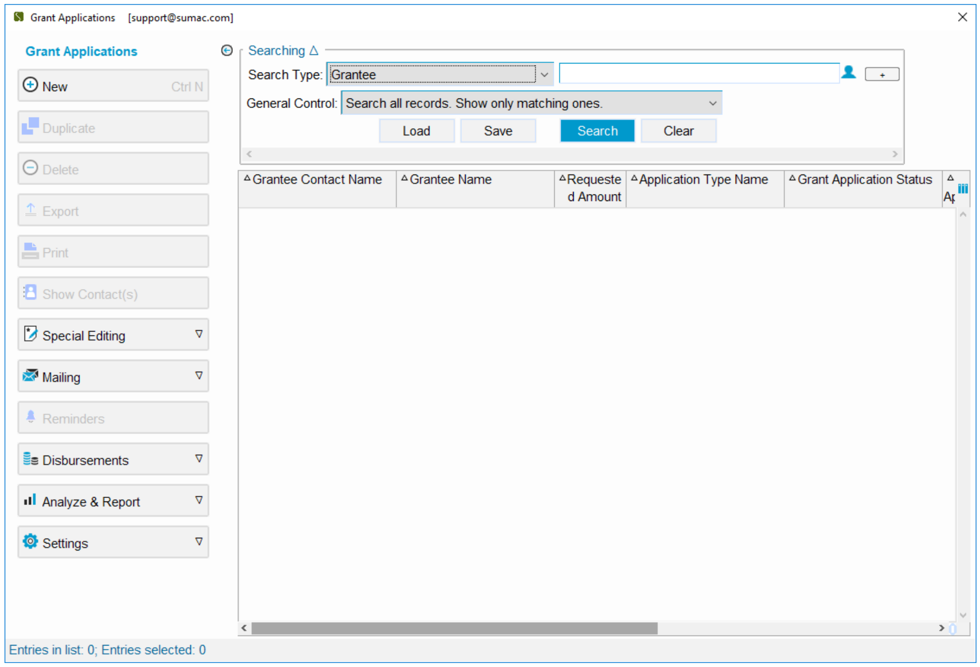
Grant Application Status	*How This Status is Set*
Contract	a. Sumac user selects it from the lookup list in the Grant Application Record. **Sumac Record:** The When Accepted/Rejected field is filled with the date this status was set. **Web user – Grantee:** In the Grant Review – Grantee web page, for the logged in Grantee the Application appears in the Grantee's table 'Active Grant Applications' with a Current Status of 'accepted'. Grantee cannot edit the submitted Application form **Web user – Reviewer:** In the Grant Review – Reviewer web page, for the logged in Reviewer the assigned Application appears in the Reviewer's table 'Submitted Reviews' with a Current Status of 'accepted'. When opening the Application, Reviewer can see a non-editable view of the Application form, and the Review form (if submitted).
Requires Final Report	a. Sumac user selects it from the lookup list in the Grant Application Record. **Web user – Grantee:** In the Grant Review – Grantee web page, for the logged in Grantee the Application appears in the Grantee's table 'Active Grant Applications' with a Current Status of 'requires final report'. Table shows three report columns: Report, Due Date, and When submitted. Under the Report column, a button link to the Report Form will show **Web user – Reviewer:** In the Grant Review – Reviewer web page, for the logged in Reviewer the assigned Application appears in the Reviewer's table 'Submitted Reviews' with a Current Status of 'unknown'. When opening the Application, Reviewer can see a non-editable view of the Application form, and the Review form (if submitted).

Grant Application Status	*How This Status is Set*
Report Completed	a. Sumac user selects it from the lookup list in the Grant Application Record. b. Sumac user fills out the Final Report Form for the Grant Application record and marks it as Final. Grant Application now has this status **Web user – Grantee:** In the Grant Review – Grantee web page, for the logged in Grantee the Application appears in the Grantee's table 'Active Grant Applications' with a Current Status of 'report completed'. Table shows three additional report columns: Report, Due Date, and When submitted. Under the Report column, a button link to the completed Report Form will show. Grantee cannot edit Report form. Under the When submitted column, the date when Final Report was submitted will show **Web user – Reviewer:** In the Grant Review – Reviewer web page, for the logged in Reviewer the assigned Application appears in the Reviewer's table 'Submitted Reviews' with a Current Status of 'unknown'. When opening the Application, Reviewer can see a non-editable view of the Application form, the Review form (if submitted) and the Report form.
Completed	a. Sumac user selects it from the lookup list in the Grant Application Record. **Sumac Record:** The When Closed field is filled with the date this status was set. **Web user – Grantee:** In the Grant Review – Grantee web page, for the logged in Grantee the Application appears in the Grantee's table 'Past Grant Applications' with a Current Status of 'completed'. If the Grant Application record in Sumac has a Final Report Form, the table in web page shows three additional report columns: Report, Due Date, and When submitted. Under the Report column, a button link to the completed Report Form will show. Grantee cannot edit Report form. Under the When submitted column, the date when Final Report was submitted will show **Web user – Reviewer:** In the Grant Review – Reviewer web page, for the logged in Reviewer the assigned Application appears in the Reviewer's table 'Submitted Reviews' with a Current Status of 'completed'. When opening the Application, Reviewer can see a non-editable view of the Application Form, the Review Form (if submitted) and the Report Form (if there is one).

Grant Application Status	*How This Status is Set*
Withdrawn	a. Sumac user selects it from the lookup list in the Grant Application Record. **Sumac Record:** The When Closed field is filled with the date this status was set. **Web user – Grantee:** In the Grant Review – Grantee web page, for the logged in Grantee the Application appears in the Grantee's table 'Past Grant Applications' with a Current Status of 'withdrawn'. If the Grant Application record in Sumac has a Final Report Form, the table in web page shows three additional report columns: Report, Due Date, and When submitted. Under the Report column, a button link to the completed Report Form will show. Grantee cannot edit the Report form. Under the When submitted column, the date when Final Report was submitted will show **Web user – Reviewer:** In the Grant Review – Reviewer web page, for the logged in Reviewer the assigned Application appears in the Reviewer's table 'Submitted Reviews' with a Current Status of 'withdrawn'. When opening the Application, Reviewer can see a non-editable view of the Application Form, the Review Form (if submitted) and the Report Form (if there is one)

The Grant Applications List

The Grant Applications list is the centralized window where you can view, search and report on all grant applications submitted to your organization. When an application is submitted online, Sumac automatically creates a new Grant Application record and adds it to your list. If you are familiar with other lists in Sumac such as the Contacts list, or Communications list, then most features in this list will feel intuitive. To access the Grant Applications list, open Sumac Console/Grant Applications. When you do, the following window appears:



If you are just getting started, we recommend using the column selector icon in the upper right corner of your list to choose the following columns to display:

- Grant Application ID
- Grantee ID
- Grantee Name
- Grantee Contact Data (may be helpful)
- Application Type Name
- Grant Application Status
- Requested Amount
- When Application Submitted
- Reviewer Fields (these depend on your organization, but we recommend showing Reviewer Name, and Reviewer Rank fields)

The Grant Applications list is useful for more than just looking at your list of grant applications all together. The following sections describe other tools and actions that you can perform from within this list.

Search

Search Type	*What it Finds*
Grantee	This search finds a list of applications based on the grantee's name.
Reviewer	This search finds a list of applications based on the reviewer's name.
Grant Application Type	Finds a list of applications based on the type of application.
Grant Application Status	Finds a list of applications based on the application status
Ready to Review	Finds a list of applications based on whether or not they are ready for re-view.

When Application Submitted	Finds a list of applications based on the date they were submitted.
When any review was submitted	Finds a list of applications based on the date any review was submitted.
When Review (1-6) was submitted	Finds a list of applications based on the date one specific reviewer (i.e. Reviewer 1-6) submitted a review.
When Final Report was submitted	Finds a list of applications based on the date the Final Report was submitted.
Overdue Reports	Finds all applications with reports that are overdue.
Disbursement Status	Finds a list of applications based on whether or not they have disbursements.
Unfinished Reviews	Finds all applications that have unfinished reviews.
Show All	Select this search option to have Sumac show you a list of all grant applications ever submitted to your organization.

Buttons

On the left side of the Grant Applications list are buttons that allow you to perform functions in the list other than just searching. Many of the buttons are common to every list, so we only review the ones unique to this list below. If you would like to see a full description of every other common button in this section, see *Using Lists* on page 29.

Mail Merge

Generate custom correspondence and report documents using the Mail Merge function in your Grant Applications list. This may be used in the traditional method, where you create an email or letter template and use the mail merge codes in Sumac to generate applicant or reviewer correspondence.

The other way you may use this field is to generate custom reports. You can build a template that holds the fields you would like to see in a report or analysis, then run it through your Grant Applications list as a mail merge. When you perform this function, Sumac inputs the relevant data into the report wherever it sees the corresponding mail merge code.

If you choose to use the mail merge area for reporting, there is a special way to indicate form fields that you would like to include in your report. The first section of the mail merge code tells Sumac which form you would like to merge data from, and the second section after the colon tells Sumac which specific field in that form you would like to merge data from. Using these codes, you are able to export information from a specific Application Form, based on the Application ID, information from a specific Review Form, based on Reviewer ID, and finally, information from a Final Report form, based on Report ID. The mail merge codes available are:

- <<ga_Application_ID:insert mail merge code from linked Form here>>
- <<ga_Review_ID1:insert mail merge code from linked Form here>>
- <<ga_Report_ID:insert mail merge code from linked Form here>>

To make this mail merge code work, you must replace the text “insert mail merge code from linked form here” with the appropriate mail merge code. To do this, go to Sumac Console/Utilities/Template/Mail Merge Codes.

For example, if you are looking to export the “overall points” field from a form submitted by Reviewer 2, then the code would look like this: <<ga_Review_ID2:y_overall_points>>.

You must use the mail merge code for the Forms which are linked to the AG Record. You can check what forms are used by looking in Sumac Console/Utilities/Customize Database/Lookup Lists, then select Area: Awarding Grants, and Lookup List: Grant Type. If you try and run a mail merge using Form codes that don't match, it won't work. Therefore, if you have different Grant Application Types that use different forms, you'll probably need a different mail merge template for each Grant Application Type.

Reminders

The reminders button allows you to find reminders that are linked to this particular grant application. To do this, select an application from the list, then click Reminders. Sumac then shows you the reminder(s) linked to this grant application. If you do not have the Reminders module active in your Sumac license, this button does not appear in your database.

Disbursements

In the Grant Applications list, you are able to create and view disbursements that are attached to any particular grant application. To do so, select an application from your list, then click Disbursements. Sumac opens a menu where you can either create a new disbursement to link to this grant application, or you can view existing disbursements for this grant application.

Analyze & Report

Quick Count

Use the Quick count report in the Analyze & Report area to have Sumac generate a quick tally of any numerical or set response field in your Grant Application list.

Assigned Reviewer Summary

Use this report to see how many applications you have assigned to your reviewers per application type.

Records that Link to Grant Applications

The Awarding Grants area of Sumac has built in integration with other areas of Sumac such as Reminders and Disbursements. Please see the sections below for a description of how each integration works.

Reminders

If you have the Reminders add on active in your Sumac database, you are able to create reminders for grant application records.

Disbursements

If you are using Sumac to track accounting and ledger information, use the disbursement integration with Awarding Grants. From within the Grant Application list, you are able to select a single grant application and link a disbursement to it. You would only do this for successful applications.

Administrative Settings

After you have created all the relevant forms for your grant application, and built the Grant Application Type, you are just about ready to start using your Awarding Grants module in Sumac. Some final administrative areas you may want to consider before launching are:

Field Preferences

Application Notes	Note that you can hide, rename or set this field as mandatory in Sumac Console/Utilities/Customize Database/Field Preferences/Grant Application.
Review Notes	Note that you can hide, rename or set this field as mandatory in Sumac Console/Utilities/Customize Database/Field Preferences/Grant Application.

Preferences

You are able to set a preference where you indicate which Contact Type is able to apply for grants. To do so, go to Sumac Console/Utilities/Customize Database/Preferences/Awarding Grants tab and use the drop down menu on this tab to indicate the Contact Type. If you do not see any options in this drop down menu, then you must first set up Contact Types in your Lookup List area.

Notifiers

Notifiers are emails that Sumac automatically sends to an interested party as soon as a record of a certain type is submitted. This is often used to notify various staff members on your team of significant actions in your database, for example, receiving a new Application Form. You are able to activate Notifiers to work in conjunction with your Awarding Grants module. When activated, the notifiers list sends an automatic email (Notifier) to any email address that you indicate when setting up the Notifier.

If you would like to set up a Notifier for whenever you receive a Final Report form from a grant recipient, do the following:

1. Go to Sumac Console/Utilities/Notifiers and click New in the upper left corner of your screen. Sumac opens the Notifier definition window.
2. Enter the Subject, and Address of intended recipient in the first two text fields.
3. Set the check box “Grant Application Form is submitted”

Contacts

Introduction

The CONTACTS list is the main list of individuals, households, companies, and other institutions managed by Sumac. Here are some examples of what a CONTACT may be:

- an entity that makes DONATIONS and receives charitable tax receipts,
- a volunteer
- a solicitor or other staff member
- a client
- a household
- an organization

or any combination of these.

Notes for the Sumac Administrator

The Utilities/Customize Database/Preferences command in the Sumac console contains several options that affect how CONTACTS appear to users. Four particularly relevant tabs in this dialog are described below: Security, Contacts, Salutations, and Country.

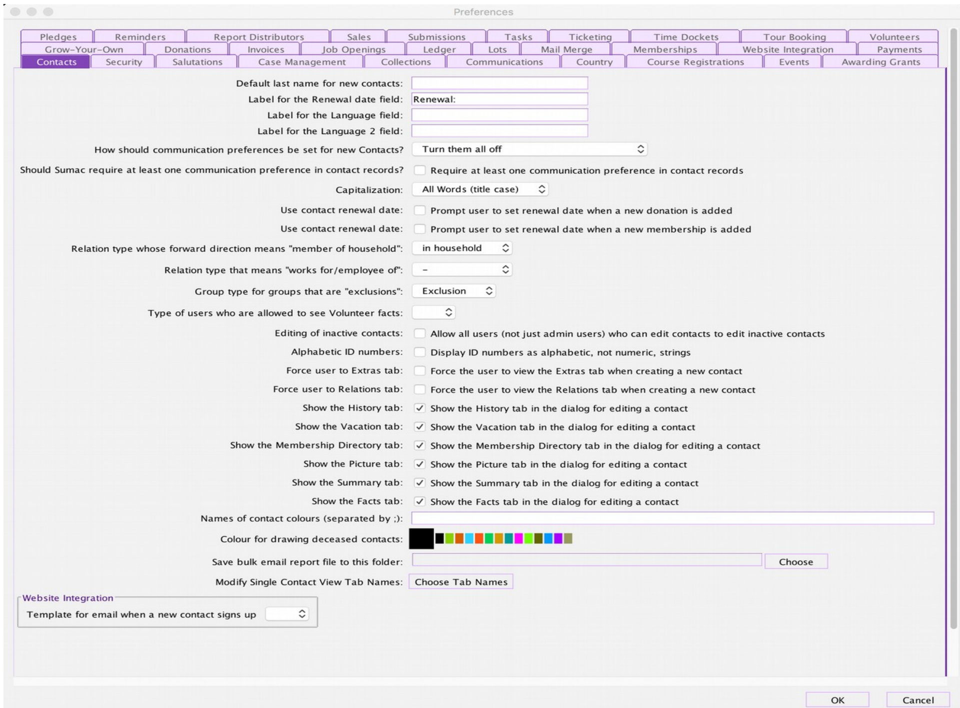
In addition, consider how the contacts will be segmented and any extra fields you may need in your contact records.

Set up Security Preference tab

You can tell Sumac to log these types of actions applied to contact records:

- delete
- create new
- view
- edit
- delete
- delete by the Resolve Duplicates command

Set up Contacts Preference



Default Last Name

You can specify a default last name. If you do this, then a user adding a new contact to the database is not required to specify a last name, and Sumac uses this default instead. Leave this field empty to require users to enter a last name for a new contact.

A suggested value to put in this field: [unknown]. The square brackets ensure that the unknown names gets alphabetized separately at the top of a list, and also prevent the unknown names from being confused with others.

Renewal Date

Each contact record contains a date field which, by default, is labelled *Renewal:*. If you do not need to record renewal dates for your contacts, but would like to record another more useful date, then you can rename this field.

Language Labels

Sumac records up to two language preferences for each contact. If you use them for specific language information (e.g. Spoken Language, Home Language), you can specify labels for these two fields.

Communications Opt-In or Opt-Out

A user can specify outbound COMMUNICATION type preferences for each new CONTACT entered into Sumac. This drop-down menu allows you to specify how each CONTACT's preferences should be set initially:

Turn them all off	This is the opt-in approach. It turns off all COMMUNICATION type preferences, and requires each CONTACT specifically to opt in to a particular COMMUNICATION type.
Turn them all on	This is the opt-out approach. It assumes that each CONTACT wants to receive all outbound COMMUNICATION types, and requires each CONTACT specifically to opt out to stop receiving one of them.
Set like the last manually created CONTACT	This approach assumes there is a fairly commonly-entered set of options. After they are entered on the first CONTACT, they default to be the same on subsequent CONTACTS.

Require one Communication Preference

Check this box if you would like Sumac to require at least one communication preference to be specified in the record. With this enabled, Sumac does not allow the user to save the contact record with no communication preferences.

Capitalization

As users enter data into certain CONTACT fields, Sumac automatically capitalizes the data. Use this drop-down menu to specify how this capitalization should be performed: all words, first word only, or not at all.

Contact Renewal Dates

Sumac tracks a renewal date for each contact. Whenever a DONATION or MEMBERSHIP is entered, Sumac prompts if the renewal date for the related contact should be set.

This option turns this prompt on and off. Sumac installations that do not track renewal dates or do not typically set renewal dates on receipt of a DONATION or MEMBERSHIP, may want to turn off this prompt.

Household Relation

Sumac can help you group CONTACTS into households. This is done by creating an additional CONTACT which represents the household itself, then relating the household members to the household.

In order for this feature to work completely, use this drop-down menu to choose the relationship which means “is a member of a household”.

Employment Relation

Sumac can show the memberships for an employer in the history tab of their employees, and vice versa. To enable this feature, tell Sumac which relationship type in your database means “employment relationship”, then set the *In the contact history, show memberships for organization's employees* checkbox in Preferences/Memberships.

Exclusion Group Type

The Campaign Wizard assists a user to, amongst other things, specify CONTACTS to be excluded from a CAMPAIGN. If Sumac knows which groups define exclusions, it can present only those groups to users of the wizard.

Hiding Volunteer Facts

If only selected users are allowed to see facts about volunteers, then you should create a user type that identifies these users. Then use the *Type of users who are allowed to see Volunteer facts* drop-down menu in the Preferences to tell Sumac which type of user is allowed to see volunteer facts.

Marking Inactive

By default, only an administrative user can mark a contact inactive. You can change this to allow allow any user who can edit a contact to also set the contact to inactive.

Alphabetic ID Numbers

Every record stored in a Sumac database is assigned an ID number. If you wish, you can have Sumac display these ID numbers as alphabetic rather than numeric strings. You may want to do this because:

- strings of alphabetic characters are easier to remember than strings of numeric characters,
- an alphabetic ID is shorter (fewer characters) than a numeric one, and
- alphabetic IDs are more reliable because Sumac can tell whether a random string of characters is a possible ID.

Force View of Tab

If your installation of Sumac uses extra fields in CONTACT records, you may wish to force a user to visit certain tabs in the CONTACT editing dialog. Note that this does not force the user to actually enter information into the tab, but just to think about whether any information should be entered.

You can force the user to view these two tabs:

- Extra: if you have defined extra fields in CONTACT records, and want to ensure that users put information into them, specify that users must visit this tab.
- Relations: you may wish to ensure that users consider entering common relations (e.g. to specify the solicitor for a CONTACT).

Show Tabs

The Sumac dialog for editing CONTACTS divides information into several tabs. If you do not use some tabs, you can hide them by clearing the corresponding check box. You can hide these tabs:

- History
- Vacation
- Membership Directory
- Picture
- Summary
- Facts

Deceased Contacts

You can specify that deceased contacts should appear in a different colour, consistently throughout Sumac. The large colour box is the colour of deceased contacts. Click other colour boxes to change the colour you want Sumac to use to display deceased contacts.

Colour

A drop-down menu in each contact record lets you choose a colour for the contact. The field labeled *Names of contact colours* lets you specify the name associated with each colour.

Bulk Email Reports

When you use Sumac to send Bulk Email, it reports what happened: which emails succeeded, which did not. If you want to always put these reports into a standard place, click to choose the folder to hold the bulk email reports.

Tab Names

The data in Contact records is organized into separate tabs. If you want to rename the tabs, click Choose Tab Names, and specify the names you want to use. Note that tabs holding extra fields are defined by you using Utilities/Customize Database/Lookup Lists/Contacts/Extra Fields.

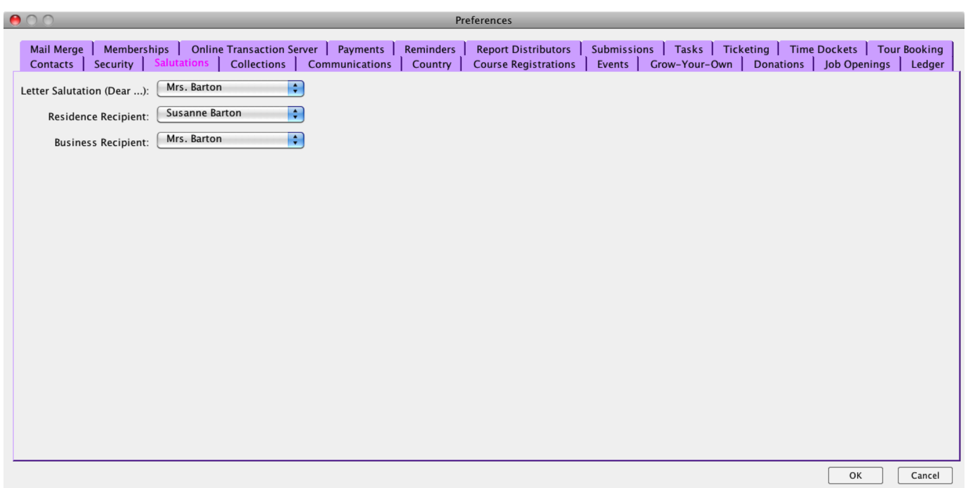
Website Integration

If your database is integrated with your website, then you can automatically send people an email when they add themselves to your database. Choose the template for the email to be sent. Note that when Sumac sends such an email, it also saves a communication record.

Set up the Salutations Preference tab

When entering a new CONTACT, Sumac uses the CONTACT's first name, middle name, last name, prefix, and suffix to construct suggested default values for the letter salutation, as well as for the form of name to be used when addressing correspondence. You can choose default formats suitable to your organization.

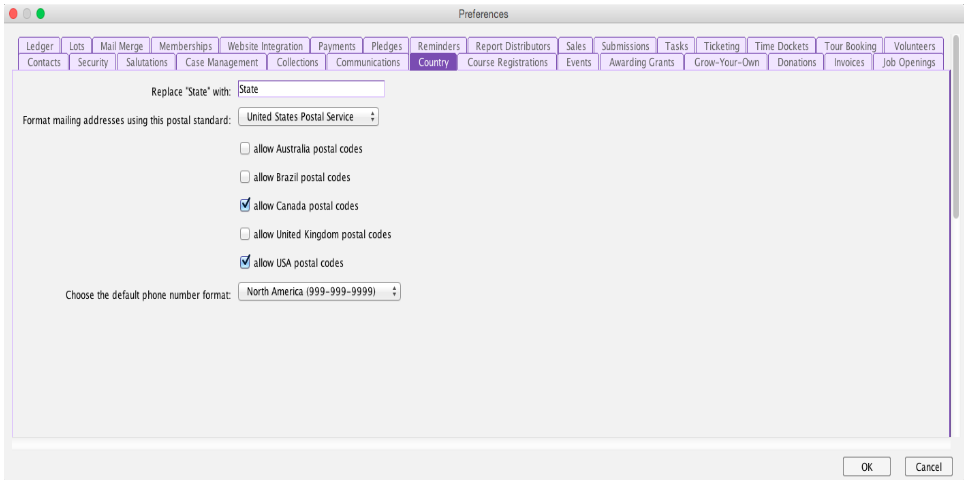
Choose the Utilities/Customize Database/Preferences command in the Sumac console then click the Salutations tab:



These formats are also used in an additional situation: If salutation fields are empty, then Sumac has the ability to automatically generate appropriate values when it does mail merge and email operations. These operations use the formats specified in the preferences dialog.

Set up the Country Preference tab

Sumac supports different country-specific data formats. This tab lets you specify them.



State

Mailing addresses refer to geographical entities which have the default name of *State*. If your country calls these something else (e.g. province, county, parish), you can enter the appropriate name here.

Street Address Format

Sumac supports two formats (Canada and U.S.), which relate to the presentation of apartment and suite numbers in addresses. If an address is apartment or suite 55 at 123 Main Street, it is formatted as follows:

Canada	55-123 Main Street
U.S. (residence)	123 Main Street Apt 55
U.S. (business)	123 Main Street Ste 55

Postal Code Format

Sumac can recognize different postal code formats. If you enter a postal code in a different format, Sumac issues a warning message but does not prevent you from entering the postal code (since it may be from a country whose postal codes are not recognized by Sumac). Click to tell Sumac which postal code formats should be recognized without emitting a warning message.

If the United States Postal Service standard is selected, Sumac positions the postal code field above the country field.

Segmentation

For extra security, you can split the list of contacts into segments. Each contact can be in exactly one segment. Each user is allowed to see contacts in one, several, or all segments.

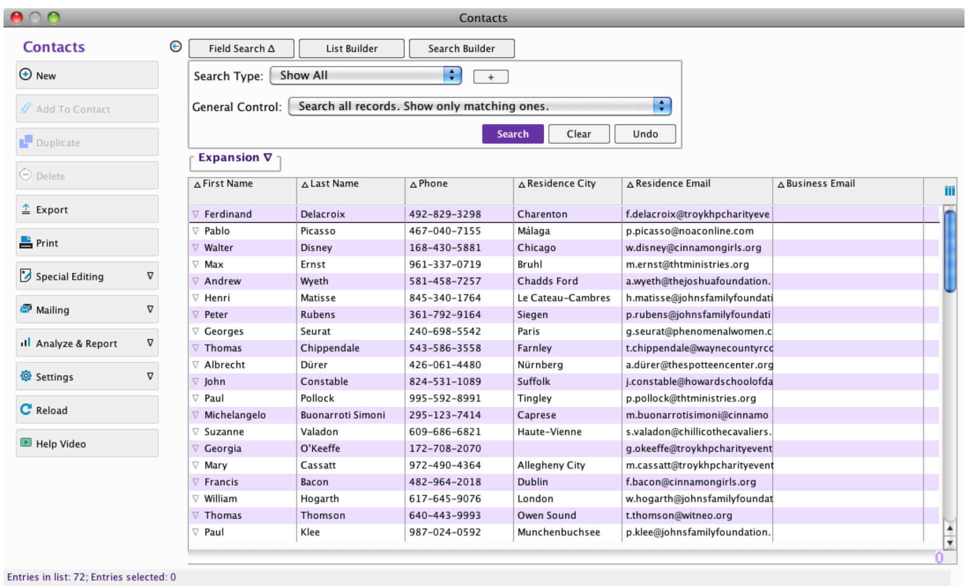
There are three things to consider when using segments:

- ✔ Add the segments: Define a new segment in your database. Use the Utilities/Customize Database/Lookup Lists command in the Sumac console. Click the Contacts area, then the Segments list, and click the New button to add a new segment. See *Segments* on page 645.
- ✔ Indicate which users can see segments: Use the Utilities/Sumac Administration/Users command in the Sumac console, double click a user and then click the Segments that that user is allowed to see. If a user is allowed to see all segments, then don't click any segments.
- ✔ Put contacts in segments: Each contact can be in a segment. If a user is allowed to put contacts into multiple segments, then the window for editing a contact has a Segment drop-down menu that lets the user record which segment the contact should be in.

Extra Fields

You can define additional fields to appear in Contact records. See Extra Fields on page 616.

The Contacts List



Expand Icons

When you click the expand icon at the start of each line in the CONTACTS list, Sumac shows information related to the CONTACT. For example, it may show COMMUNICATIONS, DONATIONS, PLEDGES, PRODUCTS, REMINDERS, TICKET ORDERS, and FORMS for the CONTACTS linked to that record. In addition, it shows related CONTACTS and the type of relationship they have with the expanded CONTACT. This extra information appears slightly indented under the line for the CONTACT.

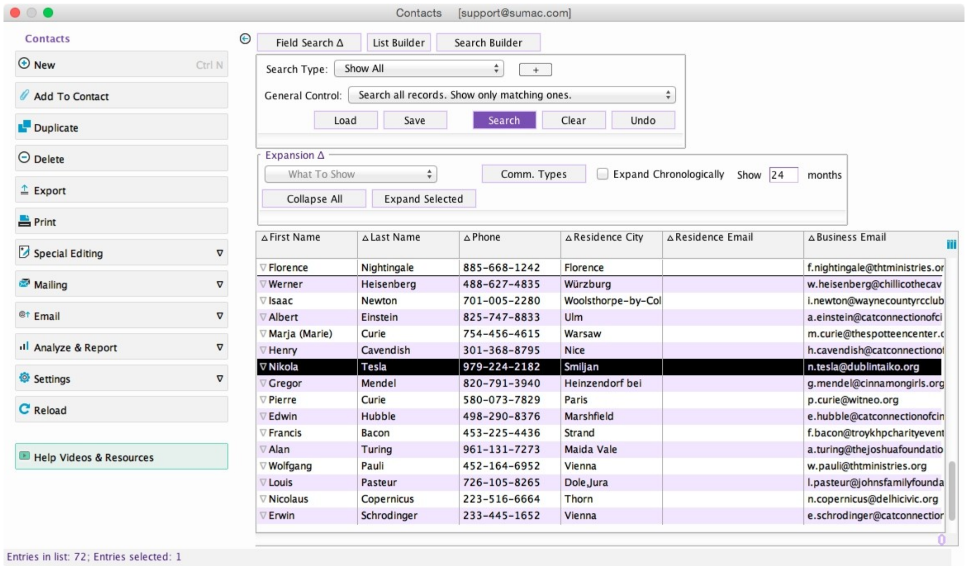
In the above picture, the first CONTACT record has been expanded and shows related records.

When you click an expand icon and it turns grey, this indicates that a CONTACT has no additional information to show.

When you click to show the extra information for a CONTACT, the icon changes from an expand icon to a contract icon. Click a contract icon to hide the extra information.

If a CONTACT is related to other CONTACTS, then the lines in the CONTACTS list that show the related CONTACTS are also expandable. When you expand a related CONTACT, only DONATIONS information and other related CONTACTS are displayed.

Expansion Control



Near the top of the CONTACTS list is a box labeled Expansion. This box provides tools that enable you to control what happens when you expand a CONTACT to show related information.

The What To Show drop-down menu contains entries for the various types of related information that can be displayed. If an entry has a check box beside it, it will be displayed when you expand a contact. Choose an entry in the drop-down menu to make its check box appear and disappear.

The Comm. Types button lets you specify communication types that you do not want to see when you click to expand a contact. For example, if your organization sends a bi-weekly newsletter, it may record each time a contact gets the newsletter. These communications can become so numerous that other types of communication become hard to see, so you could tell Sumac to not show newsletter communications

There is an Expand Chronologically check box. When Sumac expands a CONTACT to show all the related information for that CONTACT, the expanded items are grouped by category (e.g. COMMUNICATIONS are together, DONATIONS are together). If you click Expand Chronologically, you over-ride this grouping by category and instead the expanded items are ordered by date, regardless of their category. Note that relationships to other CONTACTS are not dated, so they always sort to the end of the list of expansion data.

The Collapse All button causes all expanded CONTACT information to be hidden.

The Expand Selected button causes Sumac to expand the selected CONTACTS. If more than 10 CONTACTS are selected, this button is disabled.

Show *nn* months allows you to specify how far back you want to show information. For example, if you want expansion buttons to show only the last two years of information, enter 24.

Special Columns

In the CONTACTS list, you can display some columns that are calculated from donation information.

Note that computing the value of one of these columns for a single contact requires searching in the database, so computing the values for hundreds of contacts require hundreds of searches. This can significantly slow down the display of the list of contacts.

Here are the fields that are available:

Amount of Last Donation	amount of the most recent donation by the contact
Date of Last Donation	date of the most recent donation by the contact
Total of All Donations	total of all donations ever made by this contact
Largest Donation Amount	amount of the largest donation by this contact
Largest Donation Date	date of the largest donation by this contact

Searching

Sumac provides several ways to find a CONTACT's record.

Key In A Value To Scroll To The Right Place

If you know the value of a field in a CONTACT record, and want to find the CONTACT record with that value, you can sort by the column showing the field, and type the value you want to find.

- ✔ Open the CONTACTS list window.
- ✔ Click the column title to sort by the column whose data you want to search. Make sure the triangular arrow in the title is pointing upwards for an ascending sort.
- ✔ Type the first few letters or all the digits of the value you seek. If you wait longer than about 2.5 seconds between typing two characters, then Sumac assumes you are starting to type a new value rather than adding additional characters to a previous one.

Sort Then Manually Scroll

If you want to find a particular value in one of the fields of the CONTACT record:

- ✔ Open the CONTACTS list window.
- ✔ Make sure that the field, whose value you want to find, is being displayed as a column in the CONTACTS list. If it is not, then click the column selection icon button, and drag the field of interest from the Available Fields list to the Fields To Show list, then click OK.
- ✔ Click the title of the column that shows the field in which you are searching. This sorts the CONTACTS by this particular column.

  Hint: If you sort by Last Name, then Sumac also sorts people with the same last name by their first name. If you sort by street addresses, then Sumac sorts by street name and then by house number.

- ✔ Scroll to the CONTACT of interest in one of these ways:
  - Drag the scroll bar or roll the scroll wheel on your mouse.
  - Use Page Up and Page Down keys or arrow keys. If these keys do not seem to work, click on any CONTACT to make the scrolling list the active part of the dialog, then use keyboard navigational keys to find what you are looking for.

- Type the first few characters of the value that you seek. If it is a number (e.g. an ID number) then you need to type the whole number.

Search To Shorten The List

The CONTACTS list window provides powerful searching. Searching enables you to find all CONTACTS that match specific search criteria. Here are the steps for searching:

- ✔ Open the CONTACTS list window.
- ✔ Use the Search Type drop-down menu to choose a type of search, then specify the search criteria for that type of search. See the next section for information about different types of searches.
- ✔ When you have chosen the desired search criteria, click the Search button.
- ✔ A dialog appears to tell you how many CONTACTS match the search criteria. Click OK, and only the CONTACTS that satisfy the search criteria are visible in the scrolling list.
- ✔ Once you have performed a search and thereby shortened the list of CONTACTS that are showing, you can sort and scroll to CONTACTS just as you would do within the whole list.

Searching In The Contacts List

The Searching box at the top of the CONTACTS list contains a Search Type drop-down menu. Use this drop-down menu to choose the type of search you want to perform, then specify the search criteria for that type of search. Here are the types of searches that are available:

Search Type	*Additional Search Criteria*	*What It Finds*
All Contacts	–	All CONTACTS in the database.
Contact Type	Choose a contact type from a drop-down menu.	CONTACTS whose records have the specified CONTACT type, i.e. the CONTACT is of the chosen type.
Field Search	Choose a field from a drop-down menu. Then choose a relation (e.g. *not equal to*) from the next drop-down menu. If the field has values from a lookup list, then choose the value from a menu. Otherwise, key in the value for the specified field.	Any CONTACT record in which the specified field has the specified relation to the specified value.
Outbound Communications	Choose a COMMUNICATION type from the drop-down menu.	CONTACTS whose records indicate they want to receive the chosen type of outbound COMMUNICATIONS.

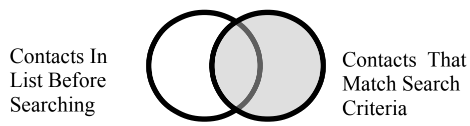
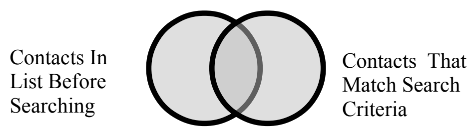
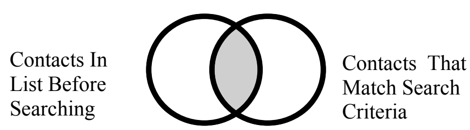
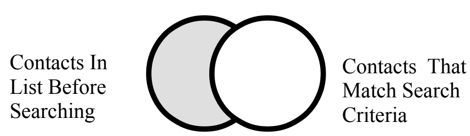
Search Type	*Additional Search Criteria*	*What It Finds*
Historical Communication	Choose a COMMUNICATION type and an event from drop-down menus.	CONTACTS for whom there is a COMMUNICATION record with the specified COMMUNICATION type and event. For example, you could find CONTACTS who received a mailing about an event.
Related Contacts	Choose a relation from the drop-down menu. Choose to indicate whether you want only contacts related to those showing in the list, or to any in the database.	CONTACTS who have a specified relationship to the CONTACTS currently showing in the list. For example, if you first did a search to find all CONTACTS that are companies, you could then search to find all the CONTACTS who are employees of the company CONTACTS already found.
Attended An Event	Choose an event from the drop-down menu.	CONTACTS for which there is a COMMUNICATION that indicates the CONTACTS attended the selected event.
Group	Choose a group from the drop-down menu. If your groups are organized by group types, you can choose from the group type drop-down menu to cause the group menu to show only the groups of that particular type.	CONTACTS that match the search criteria specified for the group.
IDs File	Click the Choose File button to identify a tab-delimited text file. For further information, see *Show Contacts Identified By An IDs File* on page 92.	CONTACTS whose IDs are in the first column of the tab-delimited text file.
Filter Households	Click a radio button to indicate whether you want to keep households and remove their members from the list, or vice versa.	Sumac removes either households whose members are showing or members whose households are showing in the list. This feature enables you to prevent mailings from going to both a household and to each individual in the household.
Preferred Medium	Choose a medium from the drop-down menu.	CONTACTS who have indicated a preference for the chosen medium.

Search Type	*Additional Search Criteria*	*What It Finds*
Volunteer Type	Choose a volunteer type from the drop-down menu.	Volunteer contacts of the chosen type.
Facts	Several search criteria allow you to search for contacts based on the contents of facts.	

After choosing the desired type of search, and specifying the specific additional information for that search type, click the Search button to cause the search to be performed.

The General Control

The General Control is a drop-down menu that lets you specify what Sumac should do with the contacts that match the search criteria. The General Control provides options that enable you to construct lists of contacts that match any desired combinations of search criteria. Here are the choices for the General Control, and what they mean:

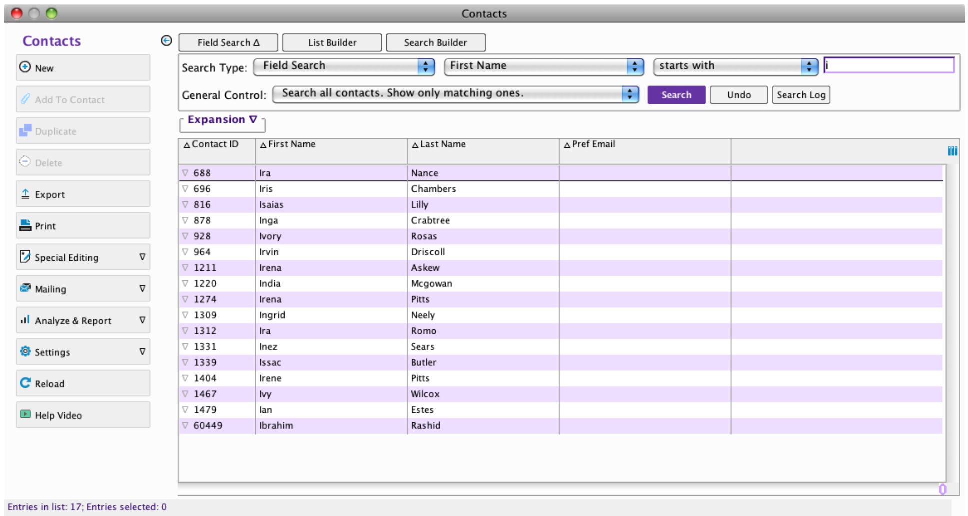
General Control	*Explanation (shaded area shows the final search result)*
Search all contacts. Show only matching ones.	After the search is done, replace the entire list of contacts with the ones that matched the search criteria. 
Search all contacts. Append matching ones to the list.	Add to the list of contacts any that matched the search criteria but which were not already in the list. Do not remove any contacts from the list. 
Search contacts showing in the list. Show only matching ones.	Remove from the list of contacts any that did not match the search criteria. 
Search contacts showing in the list. Remove matching ones.	Remove from the list of contacts any that match the search criteria. 

Combining Searches (OR)

Sumac allows you to combine the results of multiple searches to create one list. You can create a list of CONTACTS that match either one or the other of two search criteria.

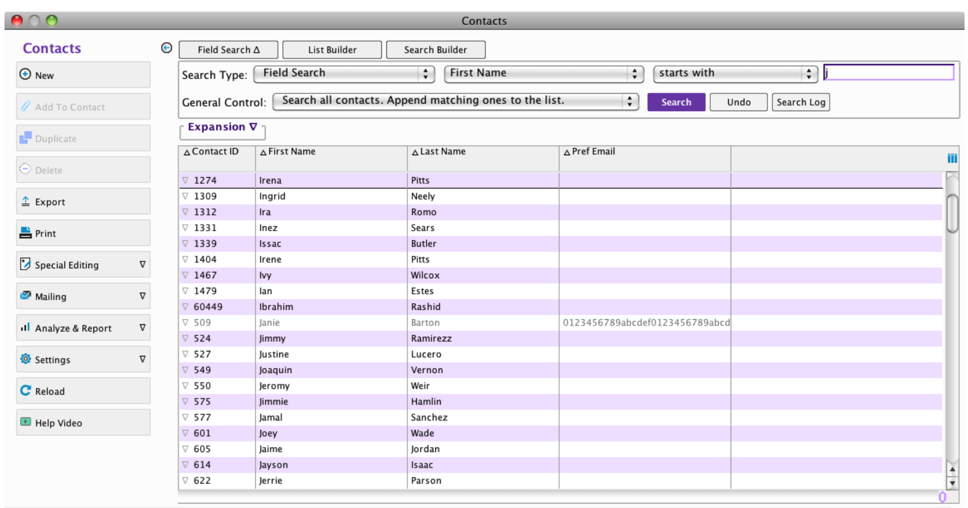
For example, what if you wanted to find all the CONTACTS whose first name starts with the letter *i* or with the letter *j*? This can be done as a two step search as follows:

✔ Do a Field Search. Choose the field *First Name*, choose the relational operator *starts with*, and then enter the letter *i* in the text field. Then click Search. The CONTACTS list should look something like this:



✔ Next you want to search for CONTACTS whose first name starts with *j*. So enter a *j* in the text field, replacing the *i* that is there.

✔ Do not click Search now, since that would cause all the *i* CONTACTS to go away, and be replaced by the *j* CONTACTS – not what you want. Instead, change the General Control menu from *Search all contacts. Show only matching ones.* to *Search all contacts. Append matching ones to the list*. This instructs Sumac to add newly found CONTACTS to the list, rather than replacing the list with the newly found CONTACTS. Now click Search. The window should look something like this:

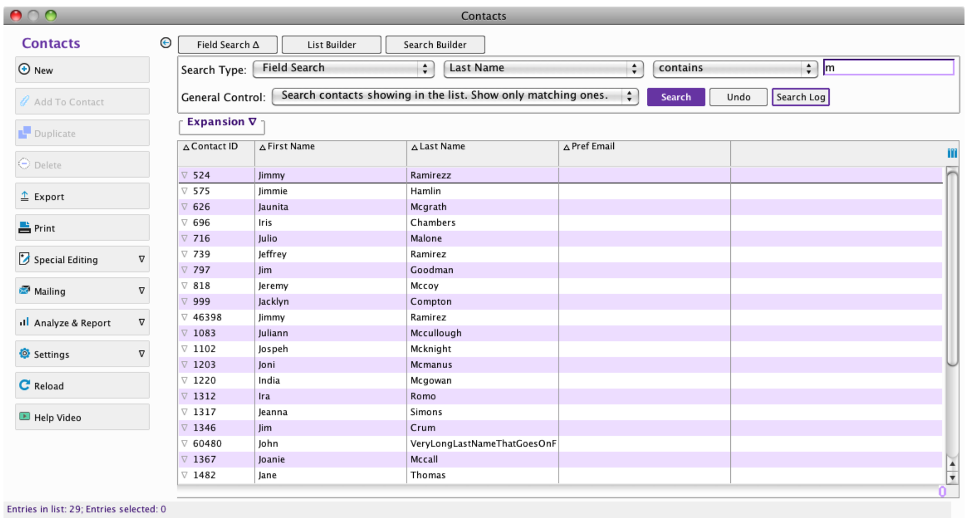


Note that both *i* and *j* names are showing in the list.

Combining Searches (AND)

Continuing with the example above, which produced a list of CONTACTS whose first name starts with either *i* or *j*, let's now find only those people in that list whose last name contains *m*.

- ✔ Still using a Field Search, choose *Last Name* from the drop-down menu of searchable fields, then choose *contains* from the relational operator drop-down menu, and then type *m* in the search text field.
- ✔ Choose *Search contacts showing in the list. Show only matching ones.* from the General Control. Now click Search. The CONTACTS list should look something like this:



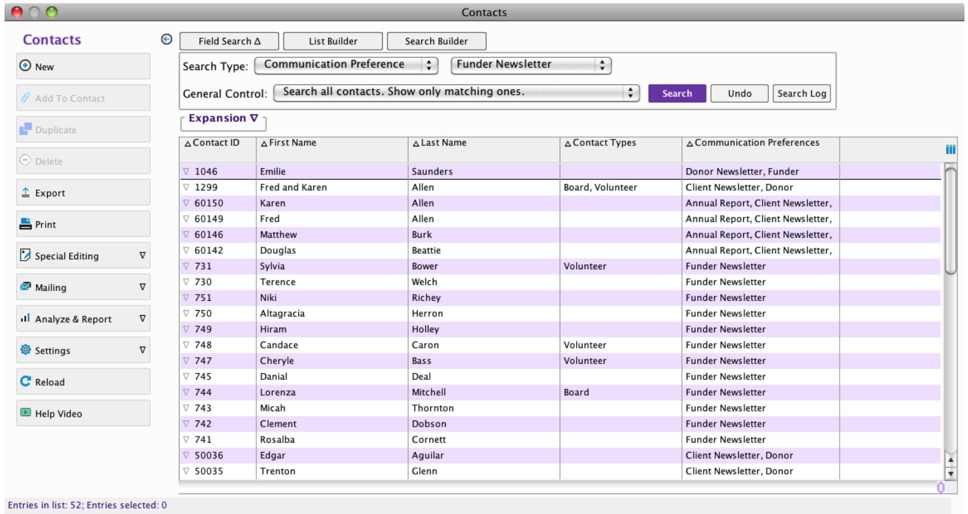
Shorten List by Removing Contacts Found by a Search

Sumac also enables you to remove CONTACTS from the list if they match the specified search criterion:

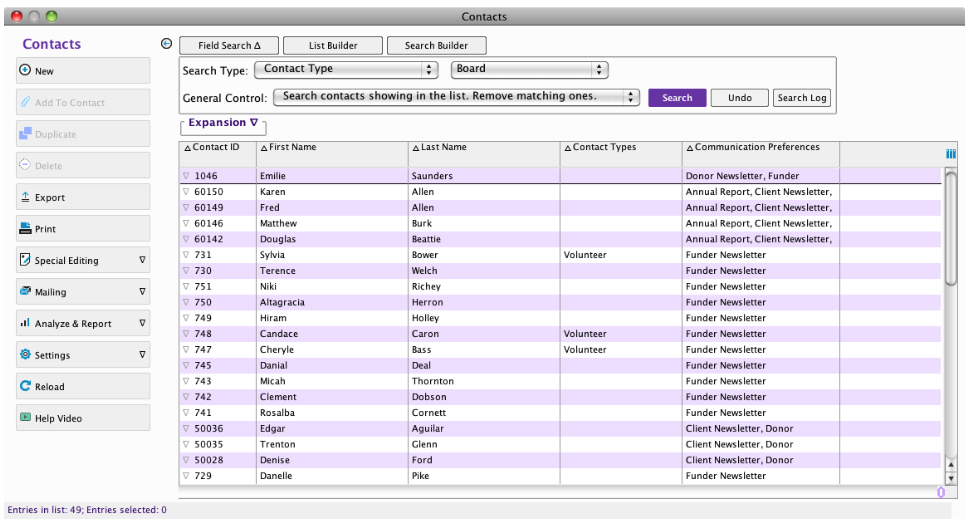
- ✔ Specify the search criterion that identifies CONTACTS you do *not* want in the list.
- ✔ Choose *Search contacts showing in the list. Remove matching ones.* from the General Control.
- ✔ Click Search. Sumac searches to find the CONTACTS in the list which match the specified search criterion, and removes them from the list.

Here is an example. Suppose you want to send a funder newsletter to people who want to receive it, but you do not want to send this letter to members of your board.

First do a Communication Preference search to to find those who want to receive the newsletter, to get a list something like this:



Now specify a Contact Type search to identify board members, and use the General Control to specify *Search contacts showing in the list. Remove matching ones.* Click Search, and the board members are removed from the list. The result is a list like this:



Undoing A Search

Note that in the CONTACTS searching area there is an Undo button. Click the Undo button to show the list of CONTACTS as it was immediately before doing the most recent Search.

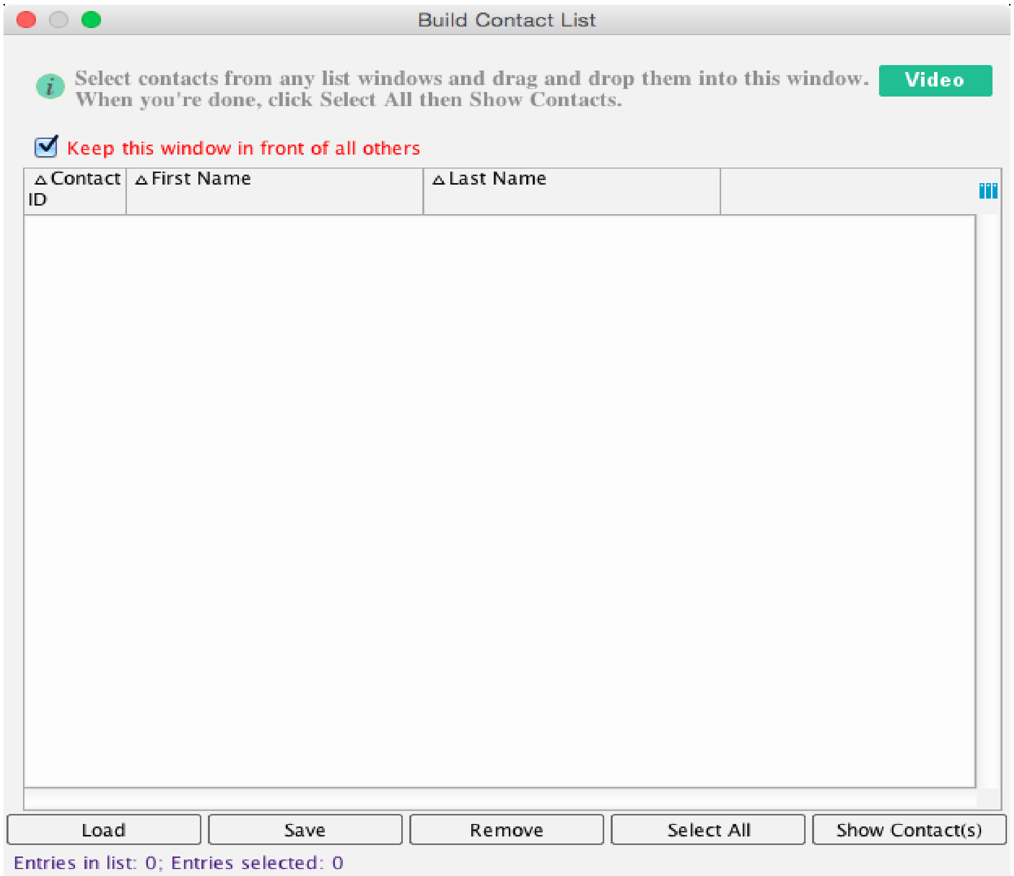
Sometime you may click Search and get no or incorrect results, and realize that you needed to set the search criteria somewhat differently. The Undo button lets you go back to the previous step and try again.

Note that Undo can undo the most recent search, but not any searches previous to the last one.

Build An Arbitrary List of Contacts

Sometimes you use a variety of search criteria to find a list of CONTACTS. But you still want to tune the list – add a few additional people and remove some too. Here is how to do this:

✔ Click the List Builder button at the top of the CONTACTS list. A window like this appears:



✔ Note that a checkbox allows you to keep the window floating on top of other windows, or let clicks provide normal window ordering.

✔ Find the CONTACTS you want by doing searches in any of these lists:

- COMMUNICATIONS
- CONTACTS
- DONATIONS
- MEMBERSHIPS
- PLEDGES
- Facts (see *Review Facts* on page 95)

✔ Drag records from one of the above lists and drop them onto the list in the Build Contact List window.

✔ You can remove individual CONTACTS by clicking to select them then clicking the Remove button.

✔ When you have the list you want, click Select All then click Show Contact(s). This switches you to the CONTACTS list with all the chosen CONTACTS showing. From the CONTACTS list, you can do whatever you need to do with the chosen CONTACTS.

✔ The Save button saves the IDs of the contacts in the list into a file. The Load button restores the list from a file that contains contact IDs in its first column.

Show Contacts Identified by an IDs File

Various reports and export operations produce tab-delimited text files listing information about CONTACTS. Reports that list CONTACTS always put the CONTACT's ID in the first column. This enables you to treat a report file like a list of IDs.

If the first column of data in the file is the CONTACTS' IDs, then Sumac is able to show the CONTACTS whose IDs are in the file. Here is how you do this search:

- ✔ Open the CONTACTS list window.
- ✔ Use to Search Type drop-down menu to choose IDs File.
- ✔ Click the Choose File button to pick the file that contains CONTACT IDs.
- ✔ Select a report file or any other tab-delimited text file with IDs in the first column.
- ✔ Then Sumac shows, in the CONTACTS list, all the CONTACTS whose IDs are in the file.

Applications of Searching Using an IDs File

Some reports perform fairly complex calculations to produce their results – a list of DONATIONS or CONTACTS. For example, the *Donors - lapsed (LYBUNT, SYBUNT)* and *Donations - first time donors* reports both produce lists of CONTACTS (donors) that are not easy to produce any other way.

Most reports contains CONTACT IDs in the first column, so if they are saved to a file, the resulting files can be used for searching.

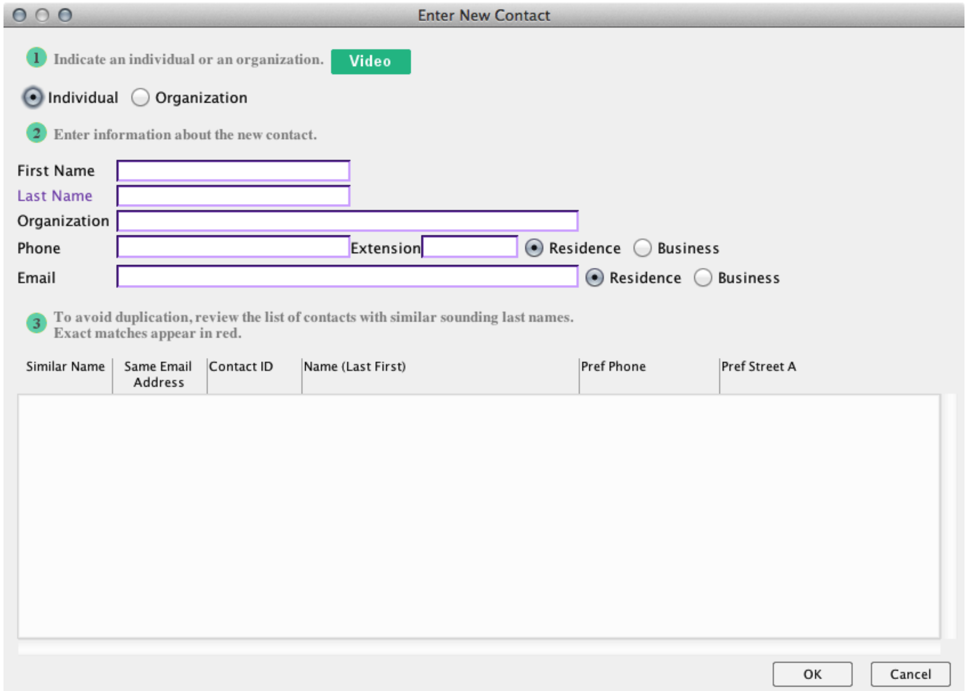
Once you have done a search to show all the CONTACTS in the report (i.e. the IDs file), you can refine your list by specifying other search criteria and using the General Control. Here are a couple of examples:

- ◆ Use a report-generated IDs file to find lapsed donors, then perform an Attended An Event search to determine if any of the lapsed donors have attended a particular event.
- ◆ Use a report-generated IDs file to find first time donors, then perform a Field Search by preferred postal code begins with a particular letter to determine which of the first time donors are from a particular location.

Buttons

New

When you click New, this window appears:



Enter basic details for a new Individual or Organization contact. As you enter the last name, Sumac shows you a list of contacts whose last name sounds the same; contacts in this list are red if they exactly match what you have typed. You can double click contacts in this list to see if they are the same as the one you are entering, so you can avoid entering a duplicate.

When you click OK, Sumac also checks to see if the email address you entered is the same as any email address in the database, and shows you contacts with a similar email address.

Ultimately, when you click OK, Sumac presents you with a new contact record, which you can complete then save into the database.

Add To Contact

Even though you are working in the contacts list, you can enter any other type of record that is linked to a contact.

Click to select the contact(s) you want to add records to, then click *Add To Contact*. Click a button to indicate the type of record you want to add.

If several CONTACTS were selected when you clicked the Add To Contact, then Sumac creates several records, one for each selected CONTACT, click to select the CONTACTS.

> Hint: You can create multiple similar records for COMMUNICATIONS, FACTS, MEMBERSHIPS, TIME DOCKETS, and Grow-Your-Own records.

Export or Print

If your Sumac administrator has defined third party products for sending bulk email to CONTACTS in your Sumac database, then, when you click the Export button in the CONTACTS list, your are given the option of sending the CONTACTS to an external email service instead of sending them to a file or printing them.

Search Builder

The Search Builder enables you to graphically construct searches for CONTACTS, based on searching fields in the CONTACT records themselves, or searching in other related records (e.g. DONATIONS, COMMUNICATIONS), and then show the list of CONTACTS found by the search. Details on how to use Search Builder can be found on page 485.

Column Selection Icon

This button presents a dialog that allows you to choose (by drag and drop) the fields that you wish to show in the CONTACTS list. See *Changing the Columns Showing in a List* on page 31.

> Hint: Changing the list of visible fields causes Sumac to reload information about the CONTACTS from the database, so it may take several seconds to complete.

You can show fields that correspond directly to entered fields. In addition, you can display these fields which are calculated based on other entered fields:

- Name: Shows the full name of a CONTACT, including prefix and suffix.
- Phone: Show the preferred phone number, based on the specified preference for vacation, business, or residence, and whether there are entries for a regular phone or a cell phone.
- Pref Address Fields: Show either the residence or business address field, depending on whether the Use Business Address check box is set. Displaying these ensures that you are seeing the CONTACT's preferred information.
- Virtual Salutations Fields: Show the information entered into a salutation field or, if it is empty, show the value defined by system-wide preferences set by the Sumac Administrator.
- Age: This is computed as accurately as possible, but if no birth year is known, age is displayed as a blank. If a month is not known it is set to January, if a day is not known it is set to 1.

Household

For detailed information, see *Working With Households* on page 115.

Mail Merge

You can produce one or more new documents – e.g. a personalized letter, invitation, renewal notice, or receipt – by merging data from the database, with a document template file that you have previously created. For details on how to create document templates, see the *Create Document Templates* on page 499. For details on how to do merge operations, see *Mail Merge* on page 479.

Labels/Envelopes

See *Labels, Envelopes, and Name Tags* on page 469.

Send Bulk Email

Before performing this command:

- Create a text or HTML document template. The creation of document templates is described in *Create Document Templates* on page 499. The document template is used to generate the content of the email that is to be sent to each CONTACT.
- The System Administrator must set up the emailing information in the record for the office that is sending the email.
- Enter email addresses into the records of the CONTACTS who are to receive email messages.

The command presents a dialog where you specify information about the email: the office, the subject line to appear in the email, the document template for generating the personalized content of the email message.

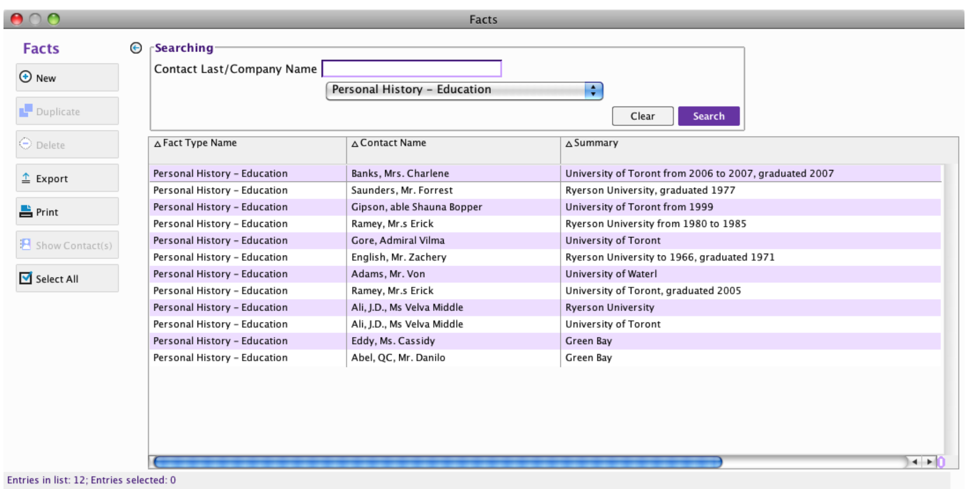
Before sending an email to a group of contacts, you should always test it first by sending the same template to yourself or one of your colleagues. This ensures that the email template works correctly and, if it contains links to other information, that the links work too.

As emails are generated and transmitted, Sumac can record this COMMUNICATION with each CONTACT. In addition, Sumac creates a log file that indicates which emails were sent.

For more details on how to send an email, see *Email* on page 400.

Review Facts

Click this button to get a list of facts. This list of facts is not just the facts for any particular CONTACT – you can get such a list by looking at the individual CONTACT's record. Instead, this list lets you look at facts of a particular type for many contacts at once.



The picture above shows Personal History – Education facts for all CONTACTS. This is useful for investigating connections (e.g. went to the same school) between CONTACTS.

Find Duplicates

In your contact list, you may want to periodically search for duplicate contacts. Duplicate contacts cause several problems:

- They take up extra space in your list windows and in the database itself.

- The duplicates may get updated independently of one another, so one may have a recently changed phone number but the other still has the old phone number.
- If information is sometimes linked to one contact record and sometimes to another one, it is very difficult to track your interactions with that contact. For example, what if your database has two contact records for Jane Doe: a $300 donation is recorded for the first Jane Doe contact, and another $300 donation for the second. You will not know that Jane has actually given $600.

Sumac looks for duplicates within groups whose first name starts with the same letter. Enter a letter of the alphabet to find probable duplicates whose last name starts with that letter. Then click Find Duplicates. Sumac looks at all the contacts whose last names start with the letter “A” to see if there any are duplicates.

If no duplicates are found, Sumac gives you a message to let you know that it did not find any duplicate contacts whose last names start with “A.” Click OK, and move on to the next letter.

However, if Sumac found some potential duplicate contacts, it shows them in its list. Notice that it shows columns for the contacts’ names, and preferred email, postal code, city and street address. These are the fields that Sumac examines when trying to decide if contacts might be duplicates.

Sumac presents possible duplicates together with a black line separating them from other sets of possible duplicates.

Some fields are displayed in red. These are the fields which were so similar that Sumac concluded the contacts might be duplicates.

Examine the list to decide whether or not these contacts are actually duplicates. You can double click any entry in the list to view the details of a contact record.

If you find a duplicate, click to select both contacts, then click Merge Duplicates. You are then following the process described below for the Resolve Duplicates button.

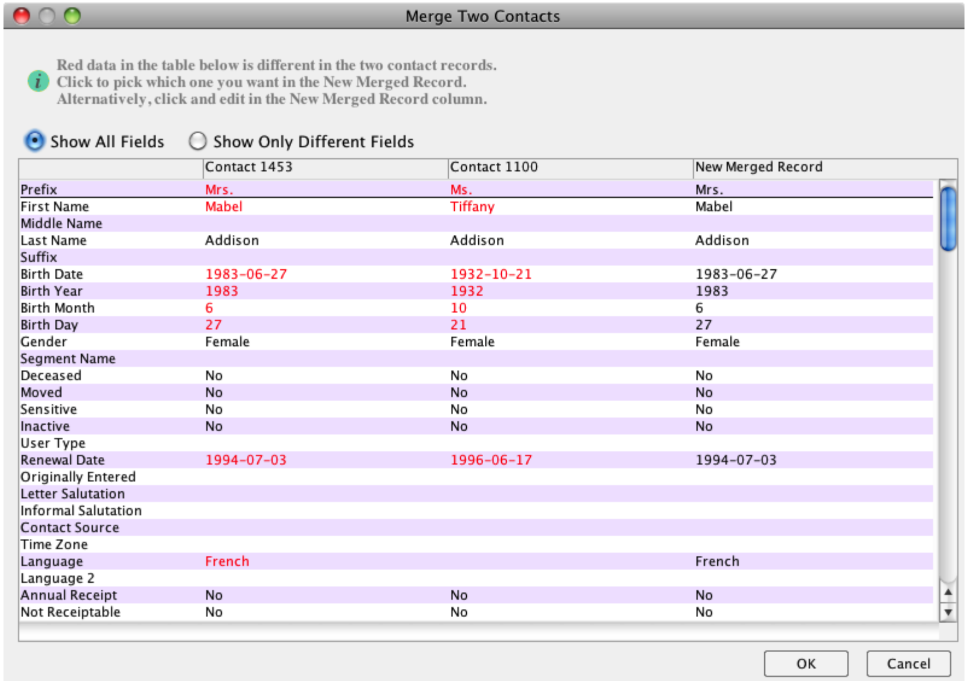
Resolve Duplicates

Click to select up to four contacts that are duplicates, then click Resolve Duplicates.

> Hint: For additional information about keeping the CONTACTS list clean, see *Get and Keep Clean Data* on page 123.

> Hint: Users who cannot delete contacts cannot use the Resolve Duplicates command.

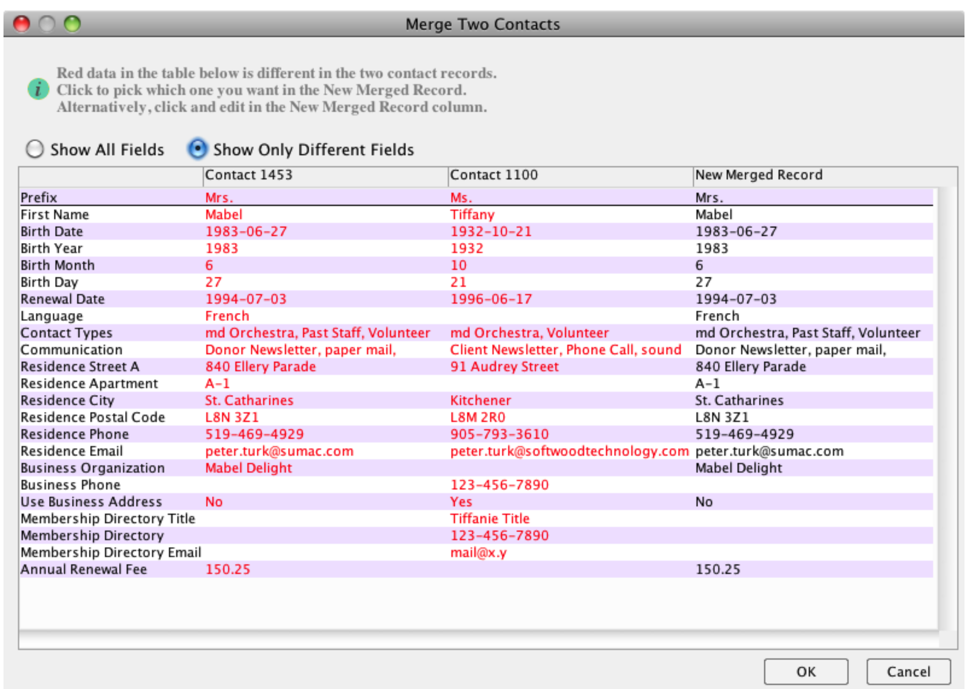
If you know that some CONTACT records are for the same person, click to select them, then click the Resolve Duplicates button. You will be asked which record you want to keep; usually you should pick the one that has the most correct information in it. If there are records linked to the CONTACTS (e.g. communications, donations), a dialog will ask you to confirm that all the related information should be merged. Then this dialog appears:



	Contact 1453	Contact 1100	New Merged Record
Prefix	Mrs.	Ms.	Mrs.
First Name	Mabel	Tiffany	Mabel
Middle Name			
Last Name	Addison	Addison	Addison
Suffix			
Birth Date	1983-06-27	1932-10-21	1983-06-27
Birth Year	1983	1932	1983
Birth Month	6	10	6
Birth Day	27	21	27
Gender	Female	Female	Female
Segment Name			
Deceased	No	No	No
Moved	No	No	No
Sensitive	No	No	No
Inactive	No	No	No
User Type			
Renewal Date	1994-07-03	1996-06-17	1994-07-03
Originally Entered			
Letter Salutation			
Informal Salutation			
Contact Source			
Time Zone			
Language	French		French
Language 2			
Annual Receipt	No	No	No
Not Receiptable	No	No	No

The first selected CONTACT's data fields are displayed in the first data column, the second CONTACT's data is in the second data column, and the values that will be used in the final record are in the right-most Result column.

Rows that are red show fields that are different between the first and second CONTACTS. Note that at the top of the dialog there are radio buttons that can be used to show all or only different fields. If you click to show only different fields, the list of fields is shortened to show only the fields that are not the same in the two CONTACTS.



	Contact 1453	Contact 1100	New Merged Record
Prefix	Mrs.	Ms.	Mrs.
First Name	Mabel	Tiffany	Mabel
Birth Date	1983-06-27	1932-10-21	1983-06-27
Birth Year	1983	1932	1983
Birth Month	6	10	6
Birth Day	27	21	27
Renewal Date	1994-07-03	1996-06-17	1994-07-03
Language	French		French
Contact Types	md Orchestra, Past Staff, Volunteer	md Orchestra, Volunteer	md Orchestra, Past Staff, Volunteer
Communication	Donor Newsletter, paper mail,	Client Newsletter, Phone Call, sound	Donor Newsletter, paper mail,
Residence Street A	840 Ellery Parade	91 Audrey Street	840 Ellery Parade
Residence Apartment	A-1		A-1
Residence City	St. Catharines	Kitchener	St. Catharines
Residence Postal Code	L8N 3Z1	L8M 2R0	L8N 3Z1
Residence Phone	519-469-4929	905-793-3610	519-469-4929
Residence Email	peter.turk@sumac.com	peter.turk@softwoodtechnology.com	peter.turk@sumac.com
Business Organization	Mabel Delight		Mabel Delight
Business Phone		123-456-7890	
Use Business Address	No	Yes	No
Membership Directory Title		Tiffanie Title	
Membership Directory		123-456-7890	
Membership Directory Email		mail@x.y	
Annual Renewal Fee	150.25		150.25

When the dialog first appears, the data from the first CONTACT is in the Result column. Click any field under the first or second CONTACT to cause it to be copied to the Result column.

You can also click any field in the Result column and edit it.

When you are finished checking each field, click OK. This causes the two CONTACT records to be merged, and all their related data to be grouped together under the resulting CONTACT record.

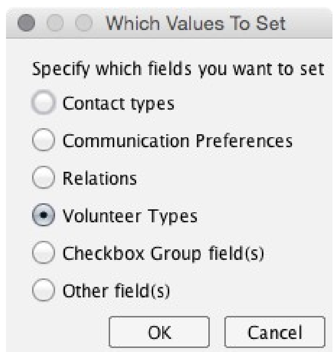
Bulk Edit

This button allows you to set CONTACT types, communication preferences, and selected other fields, in many CONTACT records at once. This enables you, for example, to quickly change address information for several CONTACTS at a single business when that business moves to a different address.

Hint: Only users with the bulk import capability can use this button.

While performing the Bulk Edit command, several dialogs appear to ask you to confirm what you are doing. This is because Bulk Edit works directly on the database. There is no way to undo what you do. So you must be very careful to ensure that you have chosen the correct CONTACTS to be changed, and that the changes you specify are exactly what you want.

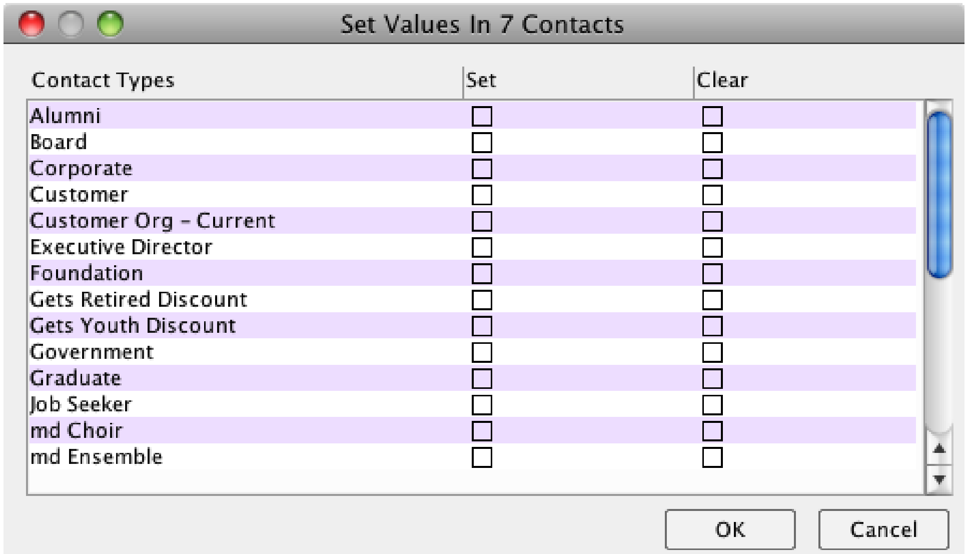
Click the Bulk Edit button to get this dialog:



Click a radio button to indicate which fields you want to set in the selected CONTACT records. Then click OK.

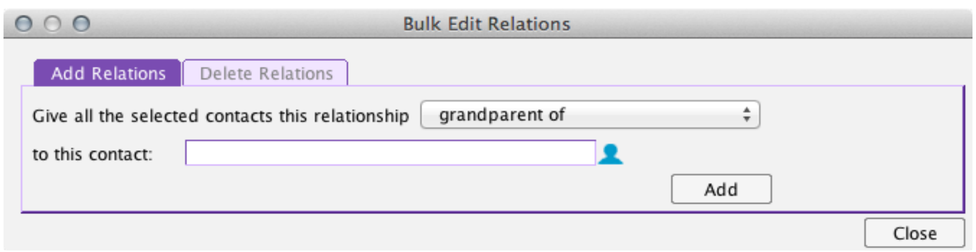
Contact Types, Communication Preferences, or Volunteer Types

If you choose contact types, communication preferences or volunteer types, a dialog like the following appears: Click check boxes to indicate which CONTACT or COMMUNICATION types you want to set or clear in the chosen CONTACTS.

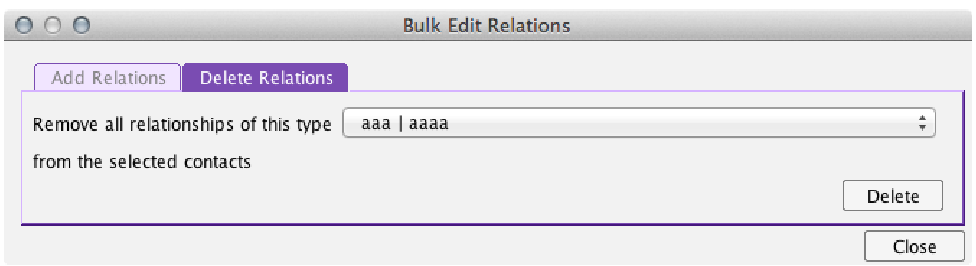


Relations

You can add relations to a specific contact:



You can delete relations of a particular type:

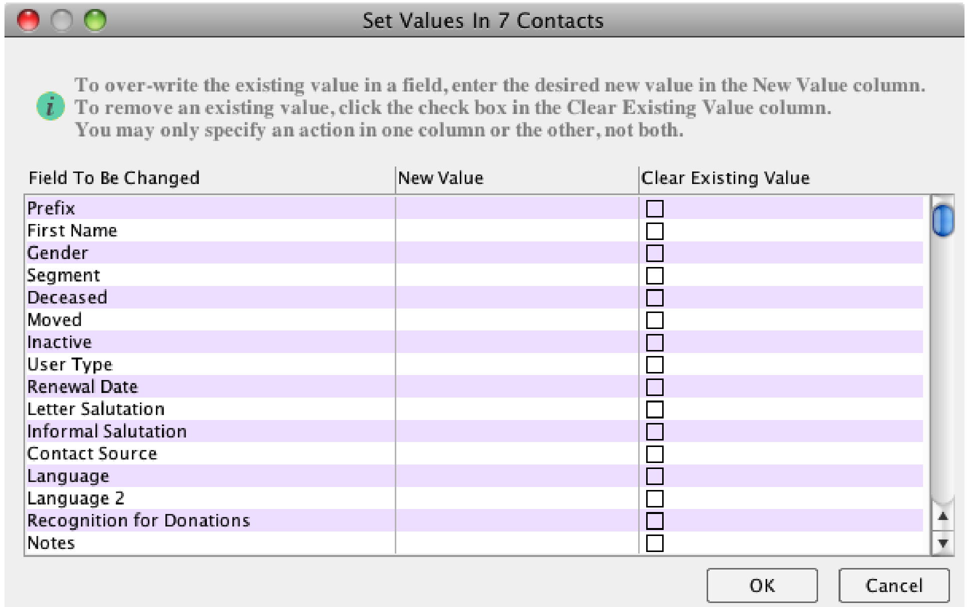


Checkbox Group Fields

If you choose this option, then you are asked which checkbox group field you want to change. You then specify which values you want to set and clear, using a window similar to the one used for setting and clearing contact types (see above).

Other Fields

If you choose to set other fields, this dialog appears:



In the New Value column, click a row and then enter a new value for a field. Alternatively, click the Clear check box to indicate that you want to clear the existing values in a field.

Campaign Wizard

This button takes you directly to the Campaign Wizard. When you use this button to enter the Campaign Wizard directly from the contacts list, the wizard knows about the list of contacts showing in the contacts list. Here are steps you might follow:

- ✔ In the contacts list, do searches to identify the contacts to be in a mailing.
- ✔ Click the Campaign Wizard button.
- ✔ In the Universe tab of the Campaign Wizard dialog, click the check box to indicate that you want the universe of the campaign to be the list of contacts that were chosen in the contacts list.

For further details, see *Campaign Wizard* on page 145.

Refresh

If other people are adding, changing, and removing contacts to the Sumac database, you can click the Refresh button to reload your entire list of contacts, getting a current list as of that moment.

Analyze & Report

Reports that are available from within the contacts list window let you report about the contacts showing in the window – all of them or just those that are selected. If you combine this selectivity of these reports with the ability of the list window to search for contacts matching specific criteria, this enables you to produce very specific reports.

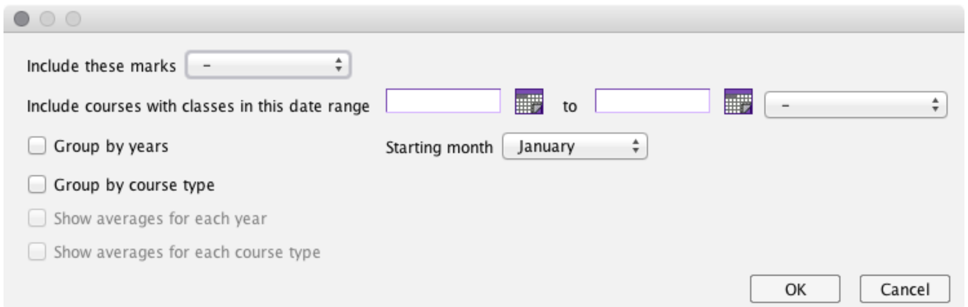
Here are some of the reports available from the Report Drop-down menu:

- ◆ Info-Summary: a summary card about each selected contact. This report is convenient for phone or door-to-door solicitors. When you choose this report, there is a special option for changing the print order of the summary cards. See *Info-Summary Print Order* on page 102.

◆ Quick Count: Use this report to have Sumac show you a quick summary of any field or column relevant to a contact record. You are shown two tables when you include a checkbox group in your quick count report. The first table summarizes the number of records containing the specific checkbox value, and the second table summarizes the number of records which contain a particular *combination* of values. If you would like Sumac to count by Age Groupings, these need to be set up in Lookup Lists. For more on Age Grouping see page 592.

Transcript Report

Click to select the students for whom you wish to produce a transcript. Then click Analyze & Report/Transcript. This window appears:



Include these marks

Indicate which types of marks you want included in the transcript report. Usually just Final marks are used.

Date Range

Choose the date range of classes to be included in the report. If you do not specify dates, then all sessions are included.

Group By Years

Click the check box to indicate that the registrations should be grouped and displayed by years. This puts a title for each academic year into the merged document. Checking this check box also enables the *Show averages for each year* check box.

Specify the Starting Month

You can define your academic year by specifying the starting month. Click on the drop-down menu to select the first month of the year.

Group By Course Type

Click the check box to indicate that registrations should be grouped and displayed by their course type. This option puts a course type title into the merged document. This check box also enables the *Show averages for each course type* check box.

Show Averages for each Year

If you are grouping registrations by years, set this check box to compute and show the average for each group of registrations. This option puts a line at the end of each year of registrations.

Show Averages for each Course Type

If you are grouping the registrations by course type, you can add a line that shows the average for each type of courses.

Document Template

After choosing your options, you are asked to pick a template document. The template can have any contact fields, and must use a list formula to show the sessions and their marks. Here is a very simple template that shows each student's name and a list of his or her registrations, with marks.

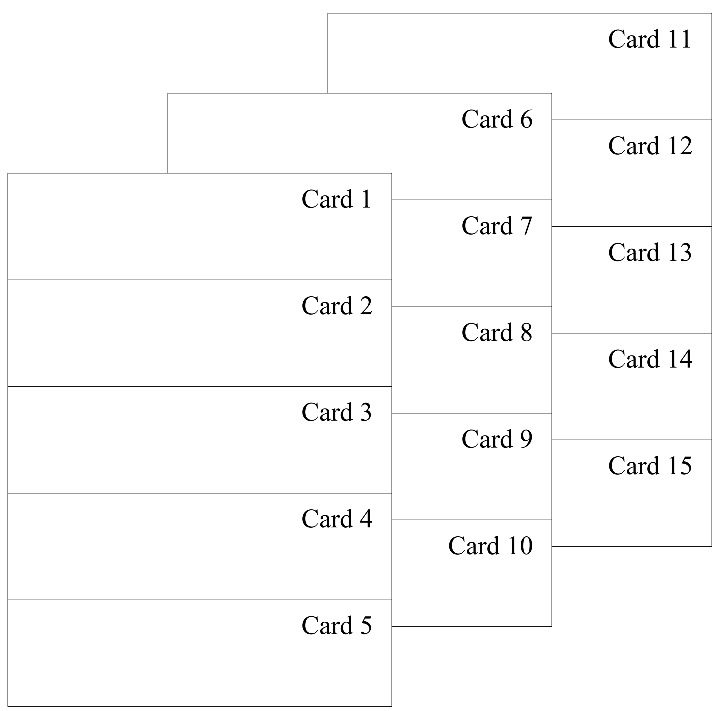
```
<<c_name>>
<<LI {r_Session_Name;r_Mark}>>
```

You can use any contact and registration merge codes. Here are a couple that are particularly relevant:

r_Cumulative_Average	This mail merge code inserts the average for all the available weighted marks of the registrations processed during the merge operation.
r_Mark	This mail merge code inserts the weighted mark for a registration calculated during the merge operation.

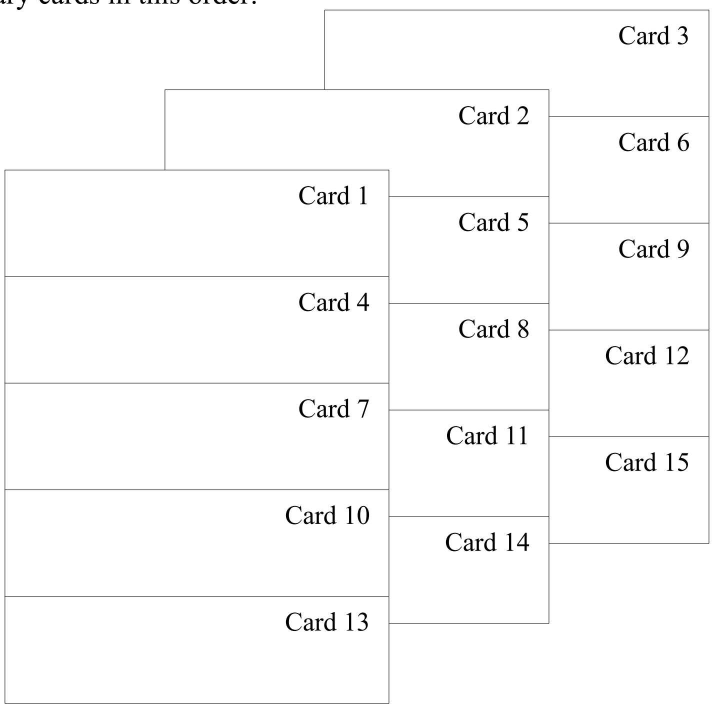
Info-Summary Print Order

The Info-Summary report available from the Report drop-down menu in the CONTACTS list produces five summary cards per page. Their normal print order is like this:



If you print these cards for door-to-door solicitors, you may be intending to cut each page into individual cards. In this situation, the normal print order is not convenient, since you cannot cut through many or all pages at once and still preserve the sort order.

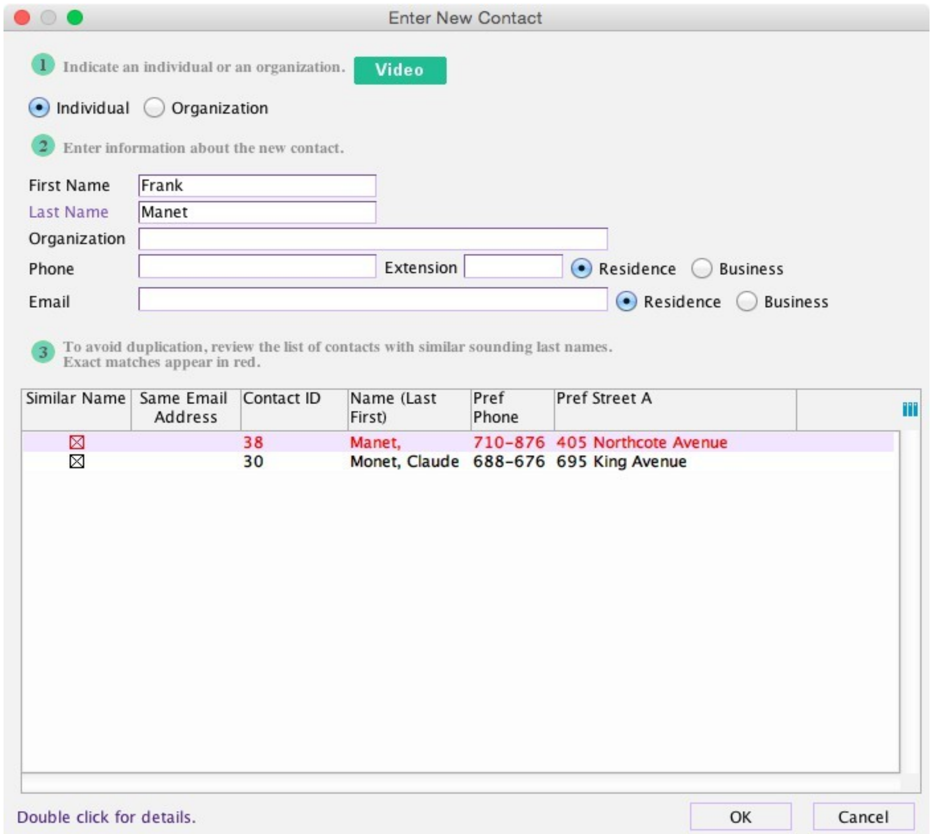
Sumac has a second option to make it more convenient to cut pages of Info-Summary reports. When you choose this option, Sumac prints information summary cards in this order:



Enter Contacts

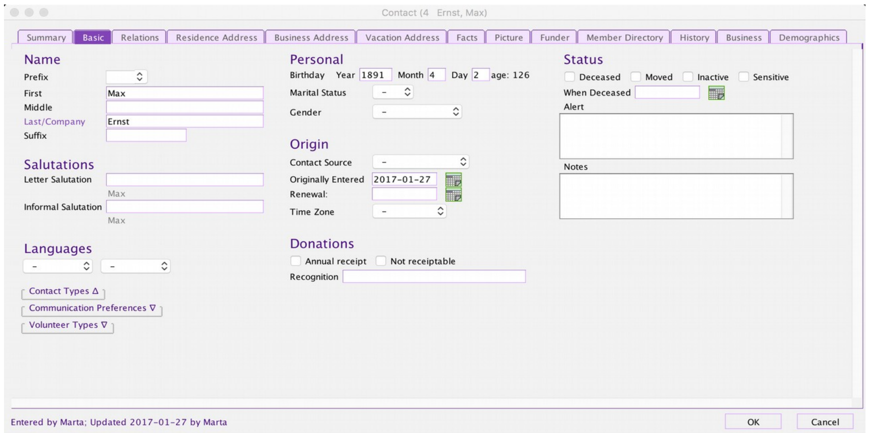
Here are the steps for entering a new CONTACT into Sumac's database.

- ✔ Show the CONTACTS list. Click the New button then click Contact. This dialog appears:



- ✔ Click to indicate if the new contact is an individual or an organization, then fill in the appropriate information.
- ✔ As you type the last (organization) name, Sumac shows contacts with similar-sounding names. You can double click them to see if they are the same as the one you are about to enter.
- ✔ If one of the names looks like it might be the one you are about to enter, then double click it to see all its details. If you determine that it *is* the same as the one you are about to enter, then ensure that you update it with any more recent information you have. If it is *not* the one you are about to enter, then click the Cancel button for the CONTACT's information, and continue with the next CONTACT that has a similar sounding name.
- ✔ When you click OK, Sumac checks to see if any contacts have the email address that you entered (if any) and gives you the option of looking at them too.

✔ When you click OK, Sumac presents this dialog for entering details about the new CONTACT:



✔ Note that parts of the dialog (Volunteer Types, Contact Types, Communication Preferences) may be collapsed. You can click their titles to expand any or all of them to see their details. Click the title again to collapse them.

Tabs in the Contact Dialog

Note that there are several tabs across the top, each identifying a different type of information:

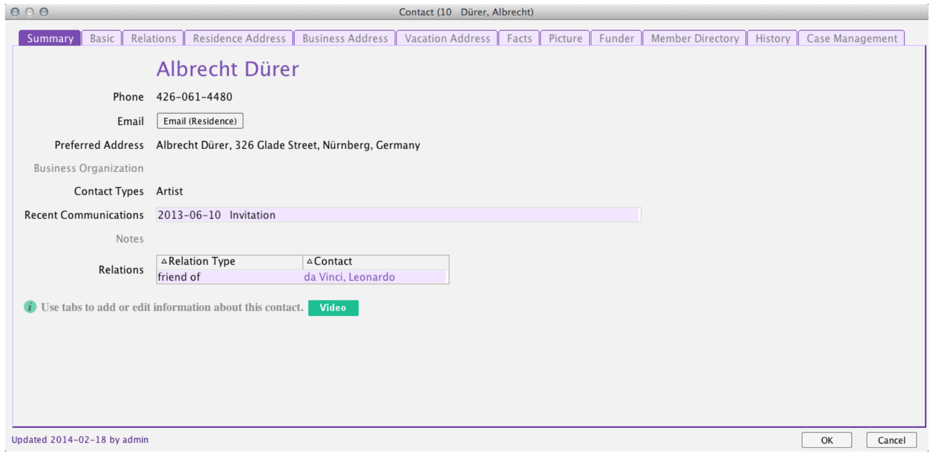
- Summary: a quick overview of some key facts
- Basic: demographic, type of CONTACT, types of communication preferences
- Relations: relations to other CONTACTS
- Residence Address: the CONTACT's house or apartment
- Business Address: the CONTACT's work
- Vacation Address: the CONTACT's seasonal vacation address (with effectivity dates)
- Facts: a variety of facts – odds and ends of information that one knows about the CONTACT
- Picture: a small portrait snapshot of the CONTACT
- Funder: if this CONTACT is a funding body, then you can enter additional information pertaining to funding programs run by this CONTACT.
- Membership Directory: information to be added to a membership directory if this CONTACT is included in the directory
- History: a list of all information in the database that relates to the CONTACT
- Extra: fields that have been defined by your Sumac Administrator, specific to your organization. There may be more than one Extra tab, and they may have different names.

The dialog for editing CONTACTS supports keystrokes to move among the various panes of information. You can use alt-arrow keys to move back and forth, and alt with specific mnemonic keys for each pane. Point your mouse at a tab, without clicking, and a small box appears to tell you which alt key to use.

Here are comments about information on each of the tabs in the CONTACT editing dialog:

Summary Tab

Most data on this tab is not editable. It gives you a quick overview of the contact and will only be visible once a contact is entered and saved, then opened again.



If the contact record has email addresses, Sumac presents buttons which set up an email for the contact.

If there are relations showing, you can click the name of a related contact to cause Sumac to close the current contact's details and open the clicked one.

Basic Tab

Prefix: You may choose a value from a drop-down menu. Alternatively, key the first few letters of an entry in the drop-down menu, then tab out of the field, the full entry is chosen from the lookup list.

Prefix, First Name, Middle Name, Last Name: When you put a value into one of these fields, Sumac automatically converts it to title case (i.e. a capital letter at the start of each word).

Gender: Choose from the drop-down menu. Gender can be one of female, male, trans, organization, and household. If a contact is an individual (female, male, trans, or no gender specified), then the drop-down menu also contains a Change command which converts an individual to an organization, moving around name and salutation fields appropriately.

Inactive: Contacts can be made inactive by choosing this check box. Only a Sumac administrator can click this check box. An inactive contact cannot be edited by anyone except a Sumac administrator. Inactive contacts appear grey in the contacts list, and cannot have any new information (e.g. communications, donations) added to them.

Informal Salutation: This field is used in the Dear ... part of a letter. If a document template calls for the use of the informal salutation, but the informal letter solicitation field is empty, then Sumac substitutes the first name instead. For further information, see *Salutations* on page 112.

donations information: You can indicate several pieces of information about how to handle donations for the contact:

- that the contact wants only one receipt per year
- that donations from this contact are not receiptable
- that donations from this contact should always be recognized in a particular way.

The Alert field holds a message that should be displayed whenever anyone opens this contact record. If there is an alert message for a contact, then that contact is red in the contacts list.

Volunteer Types: If your installation of Sumac has Sumac Volunteers, then you can click to choose all the volunteer types that are applicable to this contact.

Contact Types: Check the applicable ones.

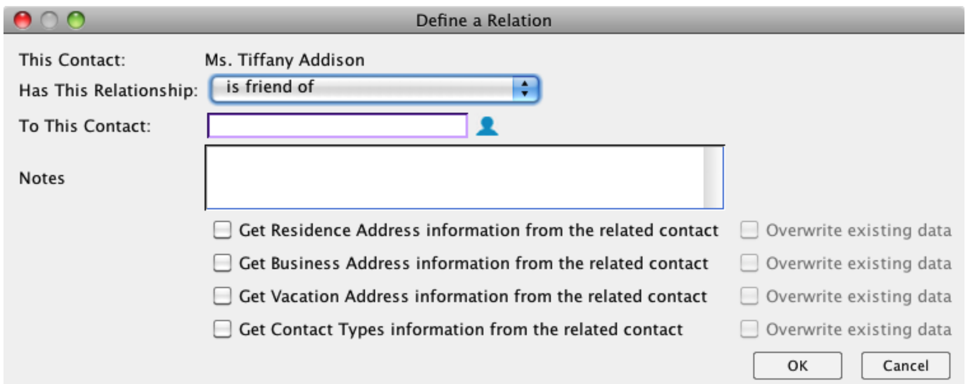
Communication Preferences: Ensure that you indicate the types of communications that the contact wants.

Relations Tab

This tab shows a list of contacts related to the contact you are viewing. You can add, remove, and review relations. The list provides these extra features:

- The list lets you click the name of a contact to close the current record and open the record for the contact that you click.
- The top left corner of the list, just above the vertical scroll bar, lets you choose which columns to show in list. Note that Sumac remembers each individual user's column choices.

When you click to create a new relation, this dialog appears:



Choose the type of relationship that the contact has to another contact. Identify the other contact. Use check boxes to indicate if you want to copy address information or contact type information from the other contact into the one you are editing, optionally overwriting any existing data. This can save a lot of typing time if you are entering an employee of a company that should have the company's business address. It also helps if you are entering a spouse or member of a household that should get the other contact's residence or vacation address.

In the list of relatins, if you click the name of a contact Sumac closes the current contact record and opens the one you clicked.

Residence Address Tab

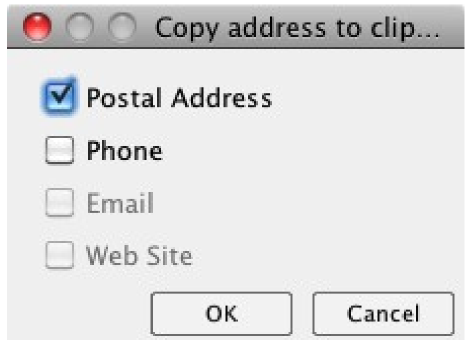
City, State (Province): You may choose a value from a drop-down menu. Alternatively, key the first few letters of an entry in the drop-down menu, then tab out of the field, the full entry is chosen from the lookup list.

City, State (Province), Country: When you put a value into one of these fields, Sumac automatically converts it to title case (i.e. a capital letter at the start of each word). If the style of capitalization seems inappropriate, the Sumac Administrator can tell Sumac to use other styles of capitalization.

There is a *Send to this email address* check box beside each email address. If it is checked, then emails sent to this contact go to this specific email address. This enables you to have a single contact record for a household and send to multiple people in the household, or alternatively to send to both a residence and business email address for a single person. When an email to a single contact is being sent to multiple email addresses, Sumac generates one email for that contact and sends it to all the email addresses.

The Duplicate Last button puts the values last entered into these address fields, in a previously edited CONTACT record, into this CONTACT record.

The Copy To Clipboard button copies residence address information to the clipboard so it can be pasted into other applications e.g. to address an envelope or letter. Clicking Copy To Clipboard presents this dialog so that you can choose which information should be put on the clipboard.



The Check Address button appears when you have integrated your Sumac database with the Quadient Data Services address verification service. This allows you to validate individual addresses in your database before sending out a mailing to a contact. Sumac may also show you two extra fields called When Checked, and User Who Checked in your contact record. These fields are automatically filled when the feature is used, and their placement is determined by the user at the time of setting up the customization.

Business Address Tab

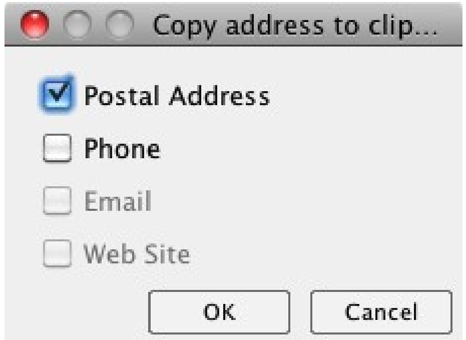
City, State (Province): You may choose a value from a drop-down menu. Alternatively, key the first few letters of an entry in the drop-down menu, then tab out of the field, the full entry is chosen from the lookup list.

City, State (Province), Country, Title, Organization, Department: When you put a value into one of these fields, Sumac automatically converts it to title case (i.e. a capital letter at the start of each word). If the style of capitalization seems inappropriate, the Sumac Administrator can tell Sumac to use other styles of capitalization.

Use this address for mailings: Sumac defaults to using the residence address for mailings. This check box tells Sumac that it should use the business address instead of the residence address when generating mailings for the CONTACT.

The Duplicate Last button puts the values last entered into these address fields, in a previously edited CONTACT record, into this CONTACT record.

The Copy To Clipboard button copies business address information to the clipboard so it can be pasted into other applications e.g. to address an envelope or letter. Clicking Copy To Clipboard presents this dialog so that you can choose which information should be put on the clipboard.



The Check Address button appears when you have integrated your Sumac database with the Quadient Data Services address verification service. This allows you to validate individual addresses in your database before sending out a mailing to a contact. Sumac may also show you two extra fields called When Checked, and User Who Checked in your contact record. These fields are automatically filled when the feature is used, and their placement is determined by the user at the time of setting up the customization.

Vacation Address Tab

City, State (Province): You may choose a value from a drop-down menu. Alternatively, key the first few letters of an entry in the drop-down menu, then tab out of the field, the full entry is chosen from the lookup list.

City, State (Province), Country: When you put a value into one of these fields, Sumac automatically converts it to title case (i.e. a capital letter at the start of each word). If the style of capitalization seems inappropriate, the Sumac Administrator can tell Sumac to use other styles of capitalization.

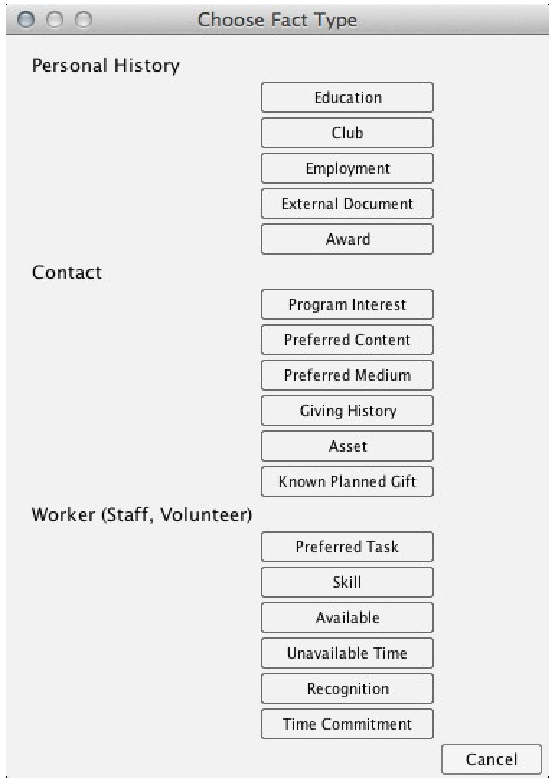
Effectivity Start, Effectivity End: Enter the dates when the vacation address is in effect.

Apply the effectivity dates in subsequent years: If you enter effectivity dates for one year, this check box tells Sumac to apply them in subsequent years. For example, if a CONTACT is known to always spend August at his vacation address, the effectivity dates could be 2005-08-01 to 2005-08-31. If you click this check box, then they will be re-applied the next year (e.g. 2006-08-01 to 2006-08-31) and in all subsequent years.

The Check Address button appears when you have integrated your Sumac database with the Quadient Data Services address verification service. This allows you to validate individual addresses in your database before sending out a mailing to a contact. Sumac may also show you two extra fields called When Checked, and User Who Checked in your contact record. These fields are automatically filled when the feature is used, and their placement is determined by the user at the time of setting up the customization.

Facts Tab

When you click the New button, you get a dialog similar to this:



The exact list of types of facts that appears, depends on the optional Sumac modules you have installed. For faster data entry, each button has a keyboard equivalent, accessed using the alt key; hold down the alt key for Sumac to underline the character that corresponds to each button. Click the fact type, then enter the details for the fact.

Picture Tab

This tab allows you to put a small picture into the CONTACT record. The pictures must be of type gif or jpg. If the file exceeds 80K in size, Sumac automatically resizes the picture to make it smaller.

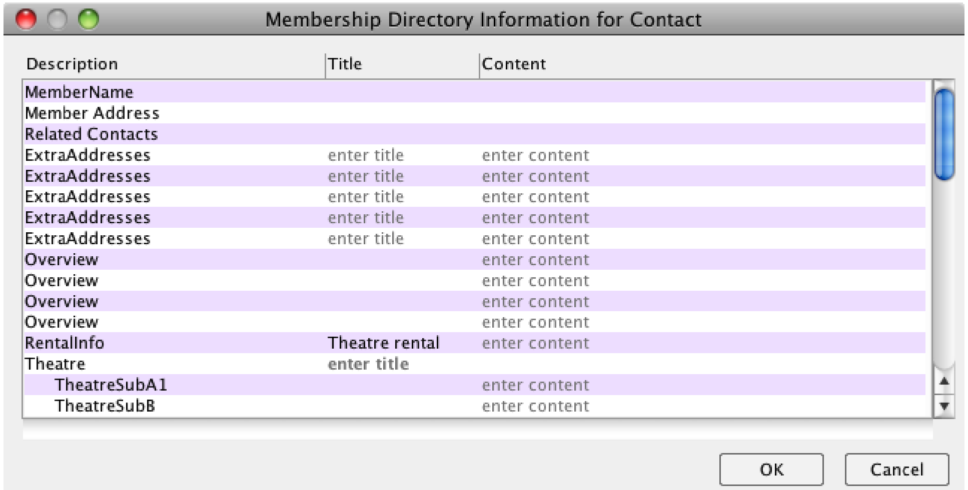
Funder Tab

If the CONTACT is a source of funds, you can enter additional funder-related information in this tab.

Membership Directory Tab

Specify information about whether and how the CONTACT should be presented in the membership directory. If the CONTACT appears as a secondary entry (i.e. subordinate or related to another CONTACT who is a member), then enter values in the fields relating to Secondary Membership Directory entries.

If the CONTACT might appear as a top level directory entry, then you should specify its directory contact type(s). You can also click the Directory Content button to specify additional information to be included with this CONTACT's directory entry.



Fields where you can enter data are shown in grey. The other information in the window shows the structure of a directory entry so that you know where the information you enter will be positioned.

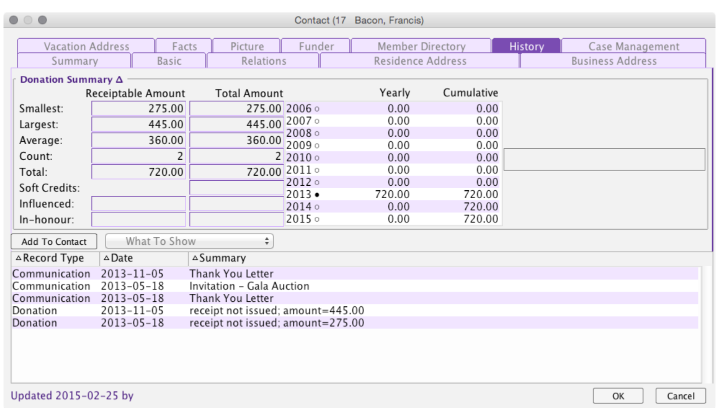
History Tab

If the contact has made any donations, then this tab contains a donation summary, showing several calculated fields, and also shows the last 10 years indicating the amount donated in each year, and a cumulative total for each year. If the contact is a member of a household there is also a household total. If you would like to print this report, then you can do so from directly within the history tab.

Sumac shows most information in the database that is connected to this contact. Note that you can click to sort the list by record type (e.g. group donations with donations, communications with communications), by date, and by summary.

There is also an Add To Contact button that lets you add records to this list.

If you want to show only certain types of records (e.g. show donations but not communications), then choose from the *What To Show* drop-down menu, turning on and off the record types of interest.



Extra Tab

If your Sumac Administrator has defined extra fields that can be entered for each CONTACT, they appear in this tab. There may be more than one extra tab, and they may have different names, according to the settings for your Sumac installation.

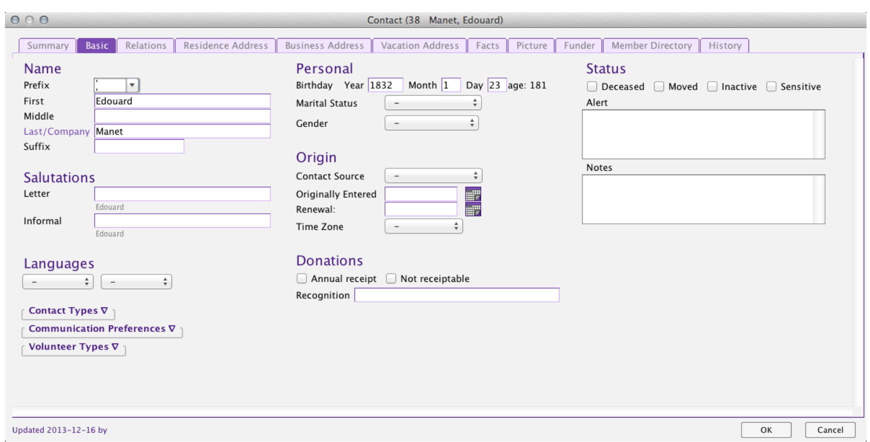
Salutations

Sumac records two salutation and three recipient fields:

Letter Salutation	This field holds the text that would normally follow “Dear...” in the opening line of a letter.
Informal Salutation	Similar to the Letter Salutation, except that this would be used for informal correspondence. If a template uses the informal salutation as the greeting in a letter, and you have not entered a value into this field, then Sumac uses the CONTACT’s first name instead.
Residence Address Recipient	This field holds the first line of a mailing address being sent to the Residence address.
Business Address Recipient	This field holds the first line of a mailing address being sent to the Business address.
Vacation Address Recipient	This field holds the first line of a mailing address being sent to the Vacation address.

Usually you do not need to enter anything into these fields. This is because the Sumac Administrator can specify default values for these fields – values that will be used if the field is empty. These default values are displayed in grey letters underneath or beside each salutation and recipient field.

For example, in the following picture, default values are displayed for two salutation fields: *Edouard* appears under the Letter Salutation field, and *Edouard* also appears under the Informal Salutation field. If these values are correct, then there is no need to insert text into these two salutation fields.

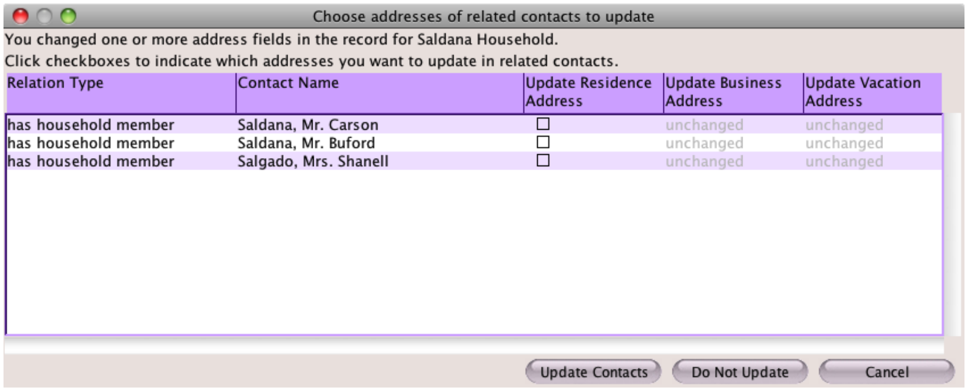


Keyboard Shortcut

When editing CONTACT records, if you want to insert into a field the same value as you entered in a previous CONTACT record, then enter a ditto mark (a double quote: ") or an apostrophe (single quote: ') and tab out of the field. Sumac interprets the single or double quote mark as an indication that you wish to repeat a value previously entered.

Updating Related Contacts

When you edit an address field (residence, business, or vacation) of a contact, then click OK to save the contact back in to the database, Sumac asks if you want to update the corresponding address fields in related contacts:



Sumac shows you each related contact and its relationship with the one that was edited. You click a check box to tell Sumac that you want it to update specific address fields in each related contact. Note that if you do not want to update any related contacts, you can click the Do Not Update button.

Enter Postal Codes

When you enter a postal code, Sumac automatically searches the database for other addresses with the same postal code. If it finds one, it fills in the city, state (province) and country in the address that you are entering.

Enter Contact Information for Companies

When entering CONTACT information for a company, follow the procedure for entering CONTACTS on page 104. In addition:

- ✔ Put the Company's name in the Last Name field.
- ✔ If you know an individual person, to whom information should be addressed, specify this in the Letter Salutation field.
- ✔ Be sure to choose *Organization* as the Gender. This indicates the CONTACT is a company. When you specify that a CONTACT has gender *Organization*, Sumac asks if you want it to automatically copy the last name field to the organization field in the business address tab, saving the need to type it again.
- ✔ Enter the business address information in the Business Address tab. Make sure you enter the Business Salutation as well. Select the *Use this address for mailings* check box.

Enter Contact Information for Couples and Families

Couples That Donate Separately

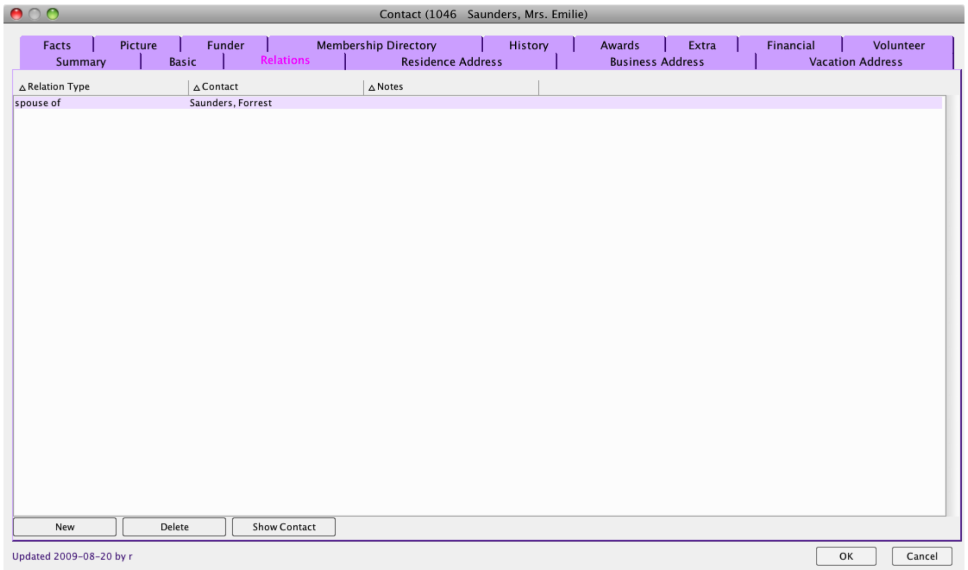
Create a CONTACT record for each individual or group that receives separate solicitations, or makes DONATIONS separately and therefore needs separate tax receipts.

For example, if a couple each separately donates to your organization and needs separate tax receipts:

- ✔ Enter a CONTACT record for each person separately.

- ✔ Some couples will consider a mail solicitation to one of them to serve for both of them, so carefully note in each person's CONTACT record which types of COMMUNICATIONS each person wishes to receive.
- ✔ Indicate that the two CONTACT records are related to each other. Alternatively, create a household record, for the couple, to provide more flexibility in managing COMMUNICATIONS. See *Working With Households* on page 115.

After entering information about each of the two CONTACTS, go to the relations tab for one of them, and enter a relation that indicates they are related to one another.



Couples That Donate Together

If a couple should be addressed and treated as a single donor unit, then:

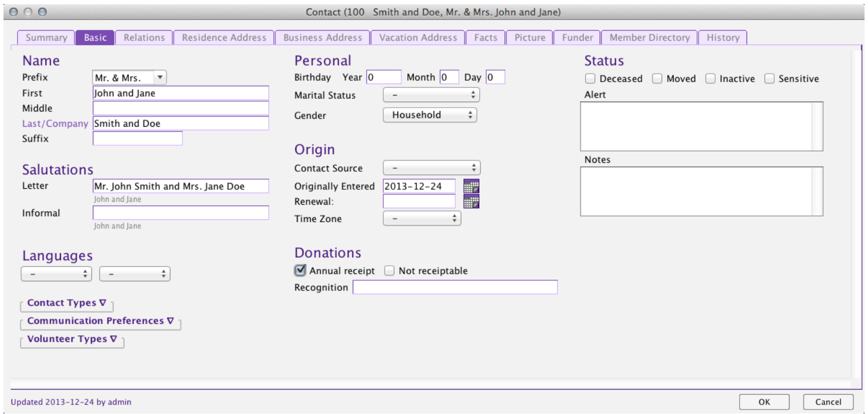
- ✔ Create a single CONTACT record for them.
- ✔ In name prefix, enter, for example, *Mr. & Mrs.*
- ✔ In first name, enter both names (e.g. *Fred and Karen*).
- ✔ In last name, enter their last name (e.g. *Allen*).
- ✔ In the suggested example, Sumac constructs default salutations as *Mr. & Mrs. Fred and Karen Allen*.
- ✔ Specify the gender of this CONTACT is *Household*.

Single Donor With Different Names

If a couple should be treated as a single donor unit, but they have different last names or otherwise more complex names, or more than two members of the family are involved:

- ✔ Follow the steps above for creating a single donor unit of multiple people.
- ✔ Change the salutations used for letters, and also change the salutations used for each of the mailing addresses, to something appropriate (e.g. "Mr. John Smith and Mrs. Jane Doe", or "The Smith Family").

This picture shows a couple who donate together but have different last names:



Enter Information Related To A Contact

If you wish to enter, say, a COMMUNICATION record for a contact, you can open the COMMUNICATIONS list and click the New button. Alternatively, and often more conveniently, you can create most types of information from within the CONTACTS list. Do this as follows:

- ✔ Open the CONTACTS list.
- ✔ Click to select the CONTACT for which you want to create new information.
- ✔ Choose the type of record you want to create from the New menu in the bottom left corner of the CONTACTS list.

For most items in the New menu, you must click a single CONTACT for which you want to create related information. However, for COMMUNICATIONS, you can create a COMMUNICATION for several people simultaneously:

- ✔ select the CONTACTS for which you wish to create a COMMUNICATION
- ✔ choose Communication from the New drop-down menu.

Working With Households

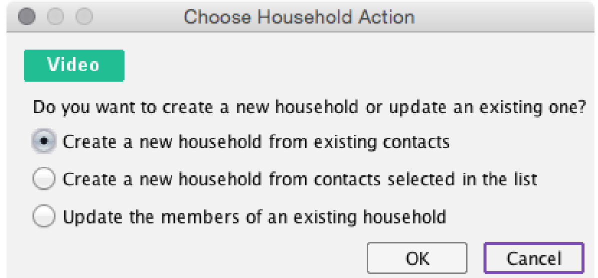
Finding Households and Their Members

To see a list of all the households in your Sumac database, show the CONTACTS list. Then perform a Field Search, to search for records where the Gender field is equal to *household*.

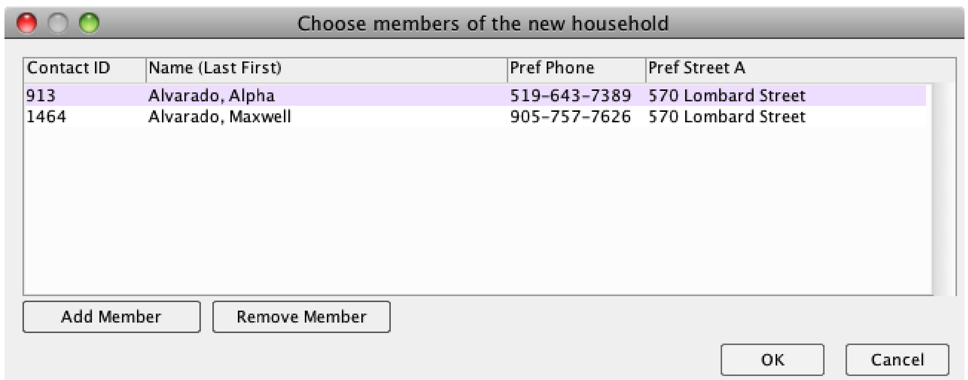
If you want to see the members of the households, perform the search for all households, as described in the preceding paragraph. Then do a Related Contacts search, choosing the relationship *member of household*.

Creating a Household

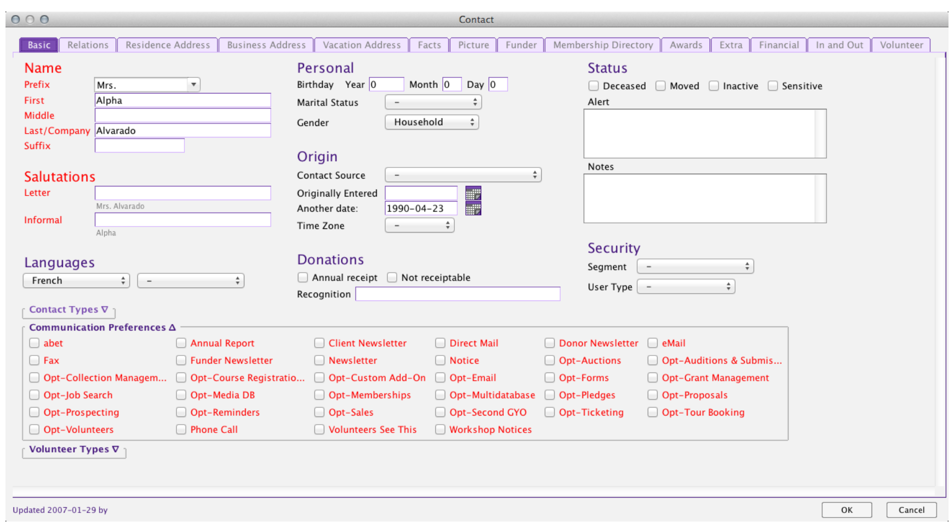
When you click the Household button in the CONTACTS list, this dialog appears:



If you choose to create a new household, you are presented with a dialog like the following one. Click the Add Member button to add new members to the household. When you click Add Member, you are presented with the standard dialog for choosing a CONTACT to add to a household. Normally this dialog allows you to choose only one CONTACT at a time. But when it is being used to add members to a household, you can choose several CONTACTS at once.



When you are done, click OK to see a CONTACT record like this:



Here are some points to note about this new CONTACT record:

- The gender of this new CONTACT record is *Household*.
- Some fields are highlighted in red. They operate exactly as they normally do – there is no change except in their appearance. They are highlighted so that you consider them carefully. The values in them were probably taken

from the first CONTACT that you added to the household, so they may not be representative of the household in general. For example, in the picture above:

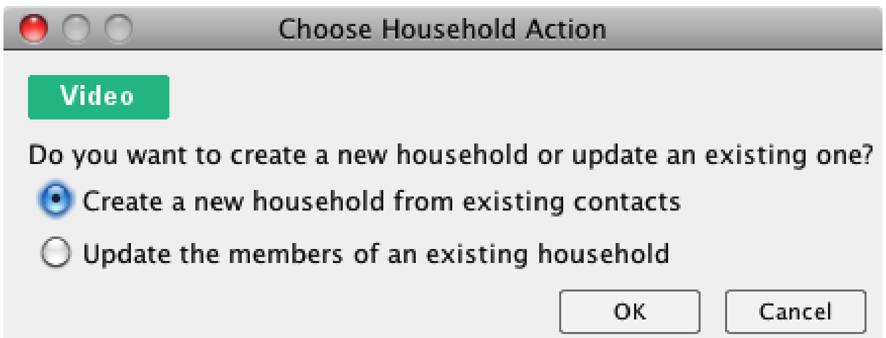
- You may want to remove the prefix and first name, and replace the last name with *Alvarado Family*.
- Alternatively, you may put *Mr. & Mrs.* in the prefix and leave *Alvarado* in the last name.

◆ When you click into the Relations tab in the dialog, you see all the household members listed.

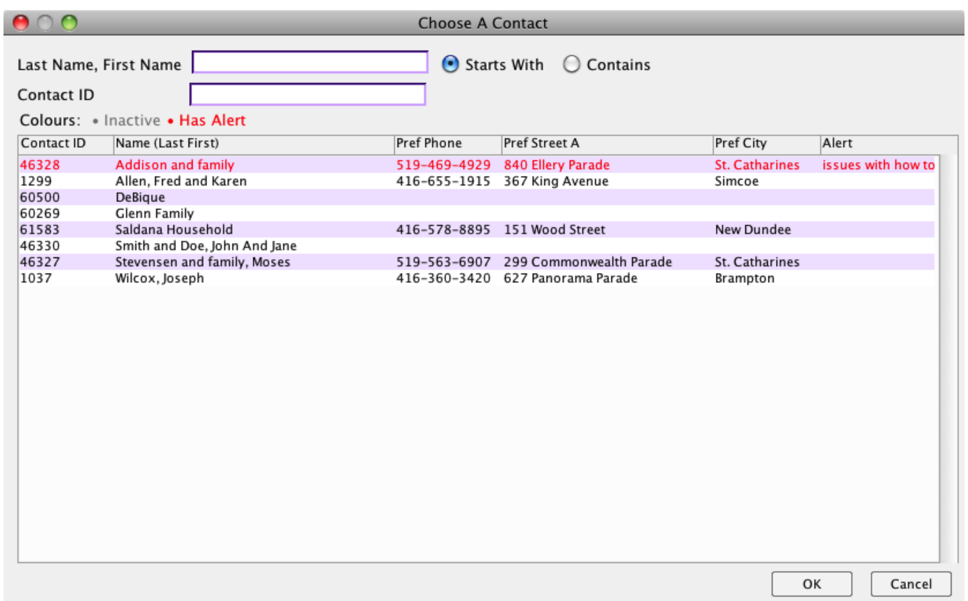
◆ It has not yet been saved to the database. It will be saved after you click OK.

Changing The Membership of a Household

When you click the Household button in the CONTACTS list, this dialog appears:



Click the radio button to indicate that you want to edit an existing household. Then click OK. This dialog appears, showing only household CONTACTS:



Click to select one of the household CONTACTS. Click OK, and the chosen household's list of members appears: Add or remove household members. Then click OK. You will be presented with the updated CONTACT record for the household. Check that it is correct, and click OK to save it.

Mailing To Households

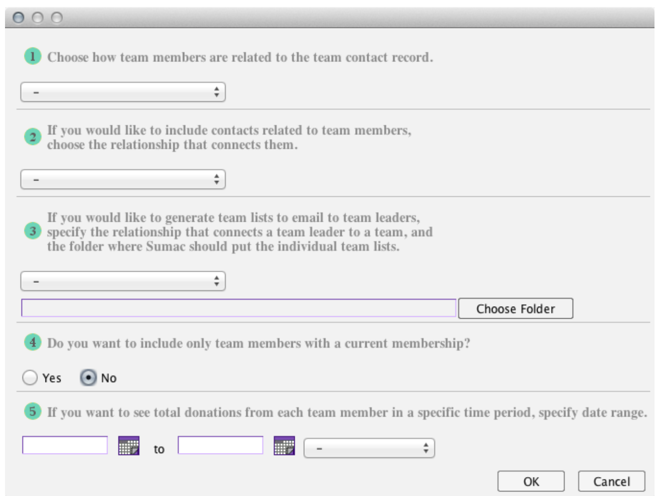
If you are preparing a mailing, you may not want to send it to both an individual in a household, and also to the household itself. Here is how to remove the individuals from a list of CONTACTS being mailed:

- ✔ In the CONTACTS list, use regular searching techniques to find all the CONTACTS who should receive the mailing.
- ✔ Then, use the Search Type drop-down menu to choose Filter Households.
- ✔ Depending on whether you want to send to individuals or to their households, click to choose either *Keep the household, remove the members*, or *Keep the members, remove the household* (i.e. do you want to send a mailing to each household or to each member of the household).
- ✔ Click Search to have the appropriate CONTACTS removed from the list.

Working With "Teams"

Sometimes contact records are not actually individuals, but are teams, clubs, families, or any other kind of group of people. Typically a team contact record is related to its team members using a relationship: perhaps "has team member/is on team".

The CONTACTS list has a Team Report that can show you who is on a team. To use this report, search to show just the team CONTACT records. Then, when you click to produce this report, this window appears:

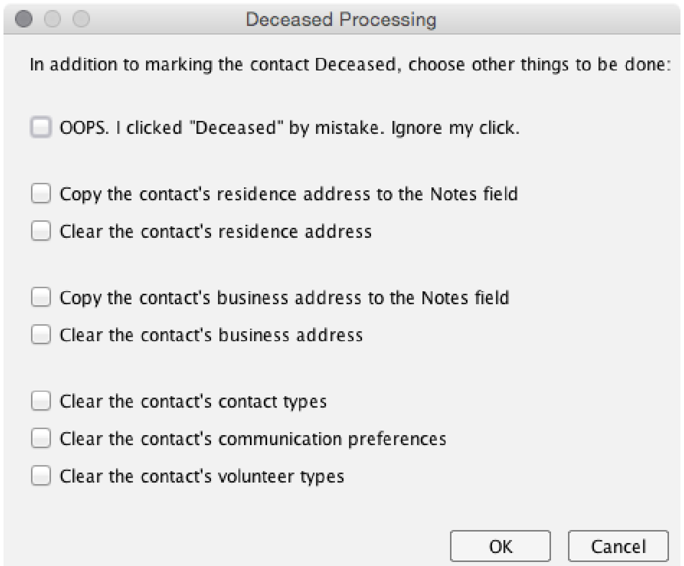


Here are your options:

- ✔ 1. Specify the relationship that connects a member to a team.
- ✔ 2. Specify a relationship to include extra contacts who are related to a team member.
- ✔ 3 If you want to generate a separate report for each team, so you can send it to the team leader, then specify the relationship between the team leader and the team contact, and the folder to hold the individual team listings. Sumac saves one report for each team leader. You can then send these reports using the Email Documents command.
- ✔ 4. If you use the Sumac Membership add-on, you may want to exclude team members who do not have a current Membership.
- ✔ 5. If you want to see fundraising by the team members, then specify the date range for showing donations.

Deceased, Moved, or Wants No Further Communication

If a contact has died or moved, you must ensure that no further communication is sent to the contact. Click the Deceased or the Moved check box in the Basic tab of the contact's record. This dialog appears:



If you want to keep the contact's address information, you can click check boxes to copy the address to the Notes field for the contact. Whether or not you are keeping the address information, you should also clear the addresses. Use check boxes to choose appropriate options, then click OK. This causes Sumac to move or clear information as you specified.

In addition, you should make the following changes in the contact record:

- ✔ Remove all types of communication preferences from the contact record, to ensure that the contact does not receive future mailings.
- ✔ Remove facts that indicate content that may be sent to the contact.
- ✔ Follow up depending on what happened:
  - If the contact died, note the date of death if you know it.
  - If the contact moved, try to find a new address.
  - If the contact no longer wants communication from your organization, make a note to that effect.

Sensitive Data

Sumac can store sensitive information which should be visible to some users but not to others. The Sumac Administrator specifies in each user's profile whether a user is allowed to see sensitive information or not. Find user settings in Utilities/ Sumac Administration/Users.

If the information about a particular contact is sensitive, then check the Sensitive check box in the Basic Tab for the contact. This prevents information in the contact record from being seen by anyone who does not have the Sensitive capability.

Facts

Facts are records associated with contacts. Each fact record contains the same fields, but these fields are interpreted differently depending on the type of fact.

When you export or print facts, you are presented with generic names for these fields – names that are not specific to any particular type of fact.

This section explains what each type of fact puts into each field.

The Generic Names

The Field Names in black are the same for all types of facts. The Field Names in grey have various meanings depending on the type of fact. Sections below indicate what is in each of these for each type of fact.

Field Name	*Contents*
Fact Type ID	The ID number of the type of fact. This is usually not useful or meaningful to a typical user.
Fact Type Name	The name of the type of fact. These are the names that appear in dialog for creating a new fact.
Contact ID	The ID number of the contact associated with this fact.
Contact Name	The name, last name first, of the contact associated with this fact.
Contact Last/ Company Name	The last name or organization name of the contact associated with this fact.
Contact First Name	The first name of the contact associated with this fact.
Notes	Notes that you have typed into the fact.
Summary	A summary of some of the information in the fact. This summary is displayed when you look at the facts tab in a contact record
When Updated	When the fact was last updated.
Updated By	User log-on ID of the user who last updated the fact.
Contact A ID	The ID of the first additional contact who may be associated with this fact.
Contact A Name	The first additional contact's name, last name first.
Contact A Last Name	The first additional contact's last name.
Contact A First Name	The first additional contact's first name.
Contact B ID	The ID of the second additional contact who may be associated with this fact.
Contact B Name	The second additional contact's name, last name first.
Contact B Last Name	The second additional contact's last name.
Contact B First Name	The second additional contact's first name.
String A	A piece of text.
String B	A piece of text.
Currency	A currency amount
Number A	A number. Usually a year.
Number B	A number. Usually a year.
Number C	A number. Usually a year.
Date A	A date.
Date B	A date.
Time A	A time of day.

Field Name	*Contents*
Time B	A time of day.
Day of Week	The number of a day of the week. Sunday is 1, Saturday is 7.
Lookup List ID	The ID of an entry from a lookup list.
Lookup List Name	The name of an entry from a lookup list.

Personal History Facts

Field Name	*Education*	*Club*	*Employment*	*External Document*	*Award*
Contact A			Colleague A		
Contact B			Colleague B		
String A	Major, Minor, Program	Name of Club	Name of Organization	Summary	Description
String B	Degree Received	Positions Held	Positions Held	URL	
Number A	Starting Year	First Year	First Year		
Date A			Start Date		Date
Date B			End Date		
Number B	Ending Year	Last Year	Last Year		
Number C	Graduation Year				
Lookup List	School	Club Type	Industry		

Contact Facts

Field Name	*Giving History*	*Asset*	*Known Planned Gift*	*Program Interest*	*Preferred Content*	*Preferred Medium*
String A	Recipient		Recipient			
String B	Purpose of Gift		Type of Gift			
Currency	Amount	Estimated Value	Estimated Value			
Date A	When Donated		When Gift Was Made			
Lookup List		Asset Type		Program	Communications Content	Communications Medium

Volunteer Facts

Field Name	*Pre-ferred Task*	*Skill*	*Available*	*Unavailable Time*	*Recognition*
Contact A		Checker (The contact who checked the fact)			
String A					Recognition (Description of the recognition.)
Date A		When Checked		Start Date	When Received (When recogni-tion was given)
Date B		Next Validation Date		End Date	
Time A			Start Time		
Time B			End Time		
Day of Week			Day of Week	Day of Week	
Lookup List	Task Type	Skill			Recognition Type.

Working With Contacts

Get and Keep Clean Data

Clean data means data that is uniform, complete, accurate, and not duplicated. Sumac provides several ways to help you get and keep your data clean.

Uniform

It is recommended that your organization establish and follow rules for how information is entered. Here are some ideas:

- Enter apartment numbers in the separate field provided for them.
- Enter phone numbers in a consistent manner, always including area codes. The recommended (North American) format is a 10-digit number as follows: 123-456-7890. This is fast to type and easy to read. If you enter phone numbers in other formats, Sumac tries to reformat them into this format.
- Enter names in mixed case, not upper case (i.e. Smith, not SMITH). If you enter names in lower case, Sumac converts them to mixed case.
- Specify that certain fields such as Last Name and Postal Code are mandatory. See *Mandatory Fields* in on page628.
- Decide on standard formats for prefixes (do you want *Mrs.* or *Mrs*? *Colonel* or *Col.*?) and enter them consistently, or let Sumac automatically enter them for you by choosing them from a lookup list. See *Prefixes* on page 635.

Complete

The best way to make sure Sumac information is complete, is to enter it as soon as possible, and enter everything you know. Whenever a CONTACT attends an event, sends a DONATION, becomes a member, responds to a COMMUNICATION, or interacts with your organization in any other way, immediately record the interaction.

Accurate

Every time you receive information from a CONTACT, perhaps with a DONATION, or a phone message, or an email, ensure that the information stored in Sumac correctly reflects the address, phone number, and email address. Check and correct name spellings.

Not Duplicated

There are two considerations here: elimination of duplicates from old data, and ensuring no new duplicates are created.

Eliminate Duplicates

Sumac provides several approaches to eliminating duplicate CONTACT information. You can show all CONTACTS, sort by Last Name (which also sorts CONTACTS with the same last name by their first name), then scroll down the list and look for duplicates.

The same process can be repeated, sorting by Last Name Soundex, instead of Last Name. Last Name Soundex is a four character code that indicates what each

CONTACT's last name sounds like. Sorting by the Soundex code causes names that sound alike to be sorted together.

If you select the two CONTACTS in the CONTACTS list, then click the Duplicates button, Sumac can merge all the data for the two CONTACTS, saving you many manual steps. See *Resolve Duplicates* on page 96.

Finally, you might sort everyone by street address, and look for identical street addresses – another common indication of duplicates.

The CONTACTS list window also contains a Duplicates button which can search for CONTACTS that may be identical, then merge their data together, all under user control.

Don't Create Duplicates

When you enter a new CONTACT into Sumac (see page 104), you type the CONTACT's last name into a dialog that shows you all names that sound like the one you are entering. If you have any doubt at all, check to make sure that one of the CONTACTS already in the database is not the same as the one being entered.

Remove Unneeded Contact Records

Don't Delete – Mark Inactive

Deleting a contact from the Sumac database permanently deletes the contact record and also removes all the data related to that contact. This includes communications, donations and payments, reminders, pledges, auction information, funding requests and programs, submissions, proposals, membership records, ticket orders, and task information. Everything.

If the contact suddenly comes back into the life of your organization, but you deleted his or her contact record, then you will regret the loss of the old data. Often, instead of deleting the contact, it is better to mark the contact as Inactive by clicking the Inactive check box in the contact's record. Inactive contacts cannot be chosen, and a routine search can remove inactive contacts from your outbound communications, saving time and money.

Identify Inactive Contacts

What makes someone inactive?

Inactive Donors

Track your donors for frequency, recency, and size of donation. You may decide to remove CONTACTS who haven't donated in a certain period of time. Perhaps, for your organization, someone who has not donated for three years is considered inactive.

Consider using a CONTACT's inactivity as an opportunity to find out why the CONTACT has not given recently, or perhaps to convey how important their gift is along with a reminder that they have not given recently.

Use the *Contacts - never donated* report to identify CONTACTS that have never donated. If you choose to implement a donor cultivation program, your Sumac database contains CONTACTS who have never donated but are being solicited with a series of timed and targeted requests and appropriate follow-up strategies. Be careful that you do not remove non-donors who are being solicited in this way.

Use the *Donations - lapsed donors* report to identify CONTACTS that have not donated recently. You may choose to implement a lapsed donor management program: solicit donors who have not given recently, with a series of timed and targeted requests and appropriate follow-up strategies.

When these non-donor or lapsed donor CONTACTS have been solicited with no results, you might send a mailing that reminds them of their inactivity. Send these mailings first class, in order to obtain address correction and mailing forwarding information back from the post office. If the CONTACT responds at all positively, keep it active and cultivate renewals.

Non-Participants

Use Sumac communication records to track who attends your events. Find people who have not attended an event in the last three years.

If you sell products or tickets, perhaps you do not want to continue paper communications to those contacts who have not purchased anything in the last three years.

Deciding to Deactivate Contacts

You may want to send several reminder letters before letting failure to respond trigger removal of a CONTACT.

Removing Contacts

Eventually, after several unsuccessful attempts to renew donors' interest, you may decide to remove CONTACTS from the database.

There are various approaches ways to remove a CONTACT.

- One is to leave the CONTACT'S information in the database, but mark his or her contact record as inactive. There is an *inactive* check box in the Basic tab of each contact record.
- Another approach might be to turn off all Communication Preferences chosen for the CONTACT, so that you will no longer send information to this CONTACT. This reduces the cost of mailings, and also preserves information (e.g. COMMUNICATION records) about your attempts to communicate with the CONTACT.
- The other approach is to delete the CONTACT from the database altogether. As discussed above, this is rarely a good approach.

Import Lists of Contacts

You are importing a list of CONTACTS. Perhaps they were entered in a spreadsheet, or come from an external ticketing or donation management system.

Be careful that the new incoming CONTACTS are not already in your Sumac database. Here are ways to minimize this problem:

- Note that as CONTACTS are added to the database, they are assigned IDs in ascending order. This enables you to distinguish new, possibly duplicate, CONTACTS from ones that were already in your database.
- Before you import the data, use Import Workspace (see *Import Workspace* on page 429) to determine whether any of the incoming CONTACTS are already in the database. If they are, do not add them again.
- Use the Check Names button in the Import dialog to determine if any of the incoming contacts are already in the database.
- After a large import of new CONTACTS, go through the steps for finding and removing duplicate CONTACTS from your database. See *Get and Keep Clean Data* on page 123.

Marketing Management

Special Events

First create a list of CONTACTS to invite to the event. Here are some ways to find the list of appropriate CONTACTS:

- Use Search Builder searches. Once you have found the relevant CONTACTS, use the Export button in the CONTACTS list to save their IDs to a file. Some types of searches to consider:
  - Contact desires a type of outbound communication – the contact wants to be invited to events)
  - Contact made a communication with a specific source code – if you use communication source codes to indicate an origin relevant to or interest in the next event
  - Received a type of communication for a specific event – if the communication type is "attended an event", and the event is the last similar event, this very specific search may yield an excellent list of invitees
  - Made a donation for an event, of a certain amount – a history of making donations to previous events makes a contact appropriate for the next event
  - Made a donation in a date range – if the contact expressed an interest in your organization in a relevant time period, then he should be invited to the next event
- Use reports. Export the report results to a file, and use the file as an IDs file. Some reports to consider:
  - *Contact – associated with an event*
  - *Donations – by event*
  - *Donations – in date [and amount] ranges*
- If you send newsletters or other recurring COMMUNICATIONS to all CONTACTS, then the list of recipients of the newsletter(s) may be the appropriate list to invite to the event. In the CONTACTS list, search by Outbound Communication preferences, then use the Export button to save CONTACT IDs to a file.
- If your organization tracks CONTACT types, you may want to ensure that certain types of CONTACTS (e.g. VIPs and funders) are invited to the event. In the CONTACTS list, search by Contact Type, then use the Export button to save their IDs to a file.

Once you have created your invitation list for your special event, the next step is to generate COMMUNICATIONS and send them to the chosen CONTACTS.

- ✔ Paper Mail
  - Show the CONTACTS list.
  - Use the Mail Merge button to create a letter for each CONTACT. Indicate that the CONTACTS come from an IDs File, and choose the file of CONTACT IDs that you generated above.
  - Use the Labels/Envelopes button to print a mailing label or envelope for each CONTACT. Indicate that the CONTACTS come from an IDs File, and choose the file of CONTACT IDs that you generated above. As part of the label printing process, when prompted, tell Sumac to save a COMMUNICATION record to indicate that each CONTACT was invited to the event.
- ✔ Email
  - Show the list of CONTACTS. Do an IDs File search and choose the file of CONTACT IDs that you generated above.
  - Use the Send Bulk Email button to send an email to each chosen CONTACT.

- As part of the email process, when prompted, tell Sumac to save a COMMUNICATION record to indicate that each CONTACT was invited to the event.

Newsletters and Other Recurring Communications

Sumac makes it very easy to send newsletters and other regular COMMUNICATIONS to your CONTACTS.

First, the Sumac Administrator should set up a COMMUNICATION type for each of the periodic outbound COMMUNICATIONS. It may be convenient to define two COMMUNICATION types for a newsletter that can be sent out in either paper format or electronic format. Alternatively, you can specify media preferences for each CONTACT and combine the media preference with the content preference.

Next, you must ensure that the record for each CONTACT indicates which outbound COMMUNICATIONS the CONTACT wants to receive. The Sumac Administrator can also specify whether a newly-created CONTACT should automatically receive all (or no, or only some) outbound types of COMMUNICATIONS which may make it easier to enter new CONTACTS and to send COMMUNICATIONS.

Once these set-up activities are done, and you have identified communication preferences for each CONTACT, you can send paper mail or email COMMUNICATIONS as described above (see *Special Events* on page 126).

> Hint: If you have a list of CONTACTS that should receive a particular type of COMMUNICATION, you can update the CONTACTS' records by importing COMMUNICATION type information or using the Bulk Edit button to set the COMMUNICATION types in the appropriate CONTACT records. The Import Workspace command is discussed on page 429 and the Import command is on page 429. The Bulk Edit button is discussed on page 98.

Media Relations

Sumac can support your media relations tasks through its CONTACT management tools. The scheduling features in Sumac Reminders and the integrated email features of Sumac Email are particularly helpful.

Separate Database?

If your organization carries out media relations activities on a frequent basis to a large number of media contacts, perhaps for events or advocacy work, then you might find it worthwhile to set up a separate database for your media contacts.

Why you might want a separate media CONTACT database:

- media CONTACTS are mostly organizations, not individuals
- the CONTACT types can be more specific to types of media organizations
- COMMUNICATIONS with the media and with donors differ.

Why you might *not* want a separate media CONTACT database:

- most COMMUNICATIONS to media are also sent to other types of CONTACTS
- having multiple databases complicates operations (though not much)
- there are not many media CONTACTS in your database.

If you decide to implement a separate database for media CONTACTS, such a database would typically have different CONTACT types from a regular donor database.

Campaigns

Whenever you plan COMMUNICATION with CONTACTS that is out of the ordinary – i.e. is not a routine and probably widely distributed newsletter, financial report, or event announcement – you should consider creating a Sumac CAMPAIGN. Here are some examples of COMMUNICATIONS of this nature:

- annual renewal drive
- raising funds for a special project, perhaps a capital project
- a drive to renew lapsed donors
- a special seasonal telephone solicitation.

Here are some reasons for creating a Sumac CAMPAIGN:

- the CONTACTS included in and excluded from the solicitation, and why they were included or excluded, are explicitly documented in a CAMPAIGN
- CAMPAIGNS support sophisticated segmentation of the CONTACTS being solicited, so you can readily define and manage narrower and more focused appeals
- DONATIONS received as a consequence of the CAMPAIGN can be explicitly related to the CAMPAIGN, enabling a future assessment of the success of the CAMPAIGN.

When constructing a CAMPAIGN, start with the Campaign Wizard to create the basic framework of your CAMPAIGN, then refine and add as required. The Campaign Wizard (see page 145) provides a convenient way to quickly:

- define the universe – the overall group of CONTACTS who will be solicited by the CAMPAIGN (e.g. last year's donors)
- specify which CONTACTS should be omitted from this universe (e.g. deceased CONTACTS)
- segment the resulting list of CONTACTS so that each can be sent a different package (e.g. one package for donors under $500, one for donors over $500)

Details about the operation of the Campaign Wizard can be found in the *Sumac Users Guide*. For complete and specialized control over the operation of the CAMPAIGN, you may also want to learn about Search Builder in the *Sumac Users Guide*.

Here is a basic comparison that shows how you might construct a CAMPAIGN, on the one hand using the functionality of regular searches and reports, and on the other hand using the enhanced functionality of CAMPAIGNS.

Task	*Doing it Without Campaigns*	*Campaign Approach*
Decide the CONTACTS who are the overall target (the universe) of the CAMPAIGN	In the CONTACTS list, perform multiple searches, and'ing and or'ing the results to get the desired list. Generate a file of CONTACT IDs. Alternatively or in combination, generate reports. Export the reports to created CONTACT ID files. Combine the various ID files to assemble a single file of CONTACT IDs who are the target of the CAMPAIGN.	Define search criteria for identifying the desired CONTACTS. You do not need to create and manage files of IDs since the lists of IDs are handled internally within the CAMPAIGN itself.

Task	*Doing it Without Campaigns*	*Campaign Approach*
Exclude certain CONTACTS (e.g. deceased) from the CAMPAIGN	Perform searches for the CONTACTS to be excluded. Remove them from the list of CONTACTS being included.	Explicitly state which CONTACTS are to be excluded. Sumac identifies them and removes them from the universe.
Segment the CONTACTS to receive different packages of COMMUNICATIONS.	Use CONTACTS list searches or reports to break the list of CONTACTS into groups (perhaps by giving levels in specific time periods). Save the IDs of each group of CONTACTS into separate files.	Specify the criteria for determining which CONTACTS will receive which packages. CAMPAIGNS can automatically ensure that (a) all CONTACTS in the universe are either excluded by an exclusion condition or included in a package, and (b) no CONTACT is accidentally listed to receive multiple packages.

Packages sent out in the context of a CAMPAIGN can be identified by package codes. DONATIONS that respond to a particular package code can then be linked to the corresponding CAMPAIGN.

Fundraising Management

Sumac supports day-to-day fundraising activities including donor renewals and cultivation, direct mail and telephone CAMPAIGNS. It also supports major gifts and unique campaigns. Analysis reports help you structure your CAMPAIGNS, target your requests and track your results.

Identify Prospective Donors

Sumac's Prospect Ratings feature enables you to examine every CONTACT's relationship with your organization. It examines things like DONATIONS, expressed interests, event attendance, ability to make donations, and known planned gifts.

It then calculates a rating and percentile for every CONTACT. This allows you to rapidly identify CONTACTS that should receive extra attention in future donor cultivation activities.

Cultivate Donors

Your organization may obtain new prospects many different ways: special events, board contacts, your website, or contests. You may wish to implement a cultivation strategy, perhaps sending your new CONTACTS newsletters or an invitation to a cultivation event, or implement a special welcome package providing detailed information about your activities and community of supports and then, of course, a request to donate.

- ✔ Create a CAMPAIGN for managing the solicitation (see *Campaigns* on page 128).
- ✔ Use the *Contacts – never donated* report or other searches and conditions to identify your prospects.
- ✔ Ensure that all COMMUNICATIONS are recorded and that any DONATIONS received as a result of the CAMPAIGN are recorded as being for the CAMPAIGN. This enables you, in future, to track the comparative success of different CAMPAIGNS.

Sumac's REMINDERS module enables you to use an action plan – a checklist of action items – in following up with each individual new contact. This enables you to keep track of many contacts at once, ensuring consistent results.

Renew Lapsed Donors

Buried in every donor base are lapsed donors – those who gave in the past but have not given recently. Perhaps resources were not available in the past to renew their DONATIONS effectively. Sumac can help you find those lapsed donors. Through reports on CONTACTS' DONATION and COMMUNICATION history, you can develop an effective renewal strategy.

The *Donors – lapsed (LYBUNT, SYBUNT)*[2] report provides you with a list of CONTACTS who donated previously, but have not donated during a user-specified period. This report provides an excellent starting point, from recent to long past lapsed donors, for your research.

- ✔ Run a *Donors – lapsed (LYBUNT, SYBUNT)* report to find out who has not donated in the past year. Save the report to a file, for further analysis.
- ✔ Open the report in a spreadsheet program. Sort by the date of the CONTACT's last DONATION, to find the most recently lapsed donors. Alternatively, sort by amount to determine the largest lapsed donors, so you can particularly focus on them.

Sumac also provides two, three, and ten year donation summaries. Look at them to see which donors are increasing, decreasing, stopping, or resuming donations.

For further information on managing lapsed donors, see *Remove Unneeded Contact Records* on page 124.

Renewal Campaign – Direct Mail

Whether you renew your donors once or four times per year, Sumac supports your CAMPAIGNS list segmentation and helps you track CAMPAIGN results.

The following example demonstrates how you might manage your annual donor renewal CAMPAIGN.

- ✔ Create a new CAMPAIGN, e.g. *2005 Annual Renewal* (see *Campaigns* on page 128).
- ✔ Define the universe of CONTACTS for the CAMPAIGN in one of these basic ways:
  - Use the Campaign Wizard to identify the universe of CONTACTS to be solicited during a CAMPAIGN.
  - When you create the CAMPAIGN, define its universe using a Search Builder search. Search Builder supports many types of searches; some search criteria that might be useful include made a donation to a specific campaign, made a donation in a date range, or a search on any CONTACT field (e.g. the renewal date).
  - Choose a report which lists the target group of CONTACTS (e.g. the *Donations - by campaign (one campaign)* report, or the *Contacts - by renewal date* report). Send the report to a file. The reports contain CONTACT IDs in their first column, and can be used as a source of CONTACT IDs for generating merged documents from document templates.
- ✔ Create a document template (see *Create Document Templates* on page 499) for generating the letters that will be sent to CONTACTS as part of this renewal campaign.

[2] Last Year But Not This year, Some Year But Not This year

- ✔ Create a folder to hold all the letters that are going to be created using the document template.
- ✔ If you have identified the universe of CONTACTS by means of a report file, then produce the letters and labels using these steps.
  - Show the CONTACTS list.
  - Click the Mail Merge button. A dialog box asks you which CONTACTS you wish to report about. Click the IDs File button. Choose the report file, since it provides the list of CONTACTS for whom letters will be generated. Then choose the document template prepared earlier.
  - Save the letters into the folder created earlier.
  - Now generate labels for the envelopes to be mailed, or print directly on the envelopes. At the same time, automatically save COMMUNICATION records to the database. Still in the list of CONTACTS, click the Labels/Envelopes button. A dialog box asks you which CONTACTS you wish to report about. Click the IDs File button. Choose the report file, since it provides the list of CONTACTS for whom labels will be printed. In subsequent dialogs, specify the format of the labels or envelopes and indicate that you want to save COMMUNICATION records to the database for each label that is printed.
- ✔ If you have identified the universe of CONTACTS by means of a Search Builder search defined as part of the CAMPAIGN, then produce the letters and labels using these steps.
  - Show the CAMPAIGNS list.
  - Click to choose the CAMPAIGN for which you are generating letters and labels. Make sure that the CAMPAIGN is of type Package.
  - Click the Identify Contacts button so that Sumac searches and identifies the number of CONTACTS to receive the mailing. Click Finalize to indicate that the CAMPAIGN'S list of CONTACTS should be frozen at this moment.
  - Click the Mail Merge button to generate the letters. Click the Labels/Envelopes button to print labels or envelopes and save COMMUNICATION records to the database for each label that is printed.
- ✔ Process DONATIONS received in response to the mailing. Be sure to note the CAMPAIGN on each DONATION. Assigning a package code to each mailing, and printing the package code on the donor response card, speeds up the process of matching a DONATION to a CAMPAIGN.
- ✔ To find out how much money was raised and who donated to the renewal CAMPAIGN, use the *Donations - by campaign (one campaign)* report. Alternatively, in the DONATIONS list, search for all DONATIONS to the CAMPAIGN then select the DONATIONS and the status bar at the bottom of the DONATIONS list shows the total.
- ✔ Use the *Campaign - communications and donations (summary)* report to determine which CONTACTS were mailed but did not donate to the CAMPAIGN.

Renewal Campaign – Direct Mail – Export Contacts to Mailing House

Using a third party mailing house service may save you time and money, not only on the mail CAMPAIGN, but also because it can provide you with updated address information:

- ◆ identifying bad addresses
- ◆ providing new address information for CONTACTS that have moved

- filling in incomplete addresses.

Here are the steps for doing mailings with a mailing house.

- ✔ Build a list of CONTACTS using Campaign Wizard, CONTACTS list search tools, Search Builder searches, or reports (see *Renewal Campaign – Direct Mail* on page 130).
- ✔ In the CONTACTS list, export the fields required by the mailing house into a text file. Note that when you do this, you should:
  - export Preferred values (e.g. export Pref City instead of Residence City or Business City) to ensure that the correct address is used, and
  - export Virtual Salutation and Virtual Recipient fields so that even if a CONTACT's salutation or recipient field is empty, Sumac will create an appropriate salutation based on your preferences.

When the mailing house returns the corrected information:

- ✔ Bad Addresses: Click the Moved checkbox for the CONTACT to move the bad address into the CONTACT's note field, and delete address information from those fields. De-select COMMUNICATION types that would use the address. Try to get a new address for the CONTACT.
- ✔ Updated Information: Import corrected CONTACT information, being sure to only update existing CONTACT records rather than creating new ones. The Import command is described on page 444.
- ✔ New Information: Import CONTACT information as update only. Caution: if the CONTACT's new address contains less information (e.g. no apt number, no Street B), those fields may have to be cleared manually or cleared using the appropriate choices in the Import dialog. The Import command is described on page 444.

Customize Your Direct Mail Ask

One of the most effective ways of obtaining increased gifts from donor renewals is to make a specific ask that reflects the donor's giving history and outlines the benefits offered at the increased gift level. Sumac document templates can be used to automate the creation of customized asks for renewal mailings. For detailed instructions, see *Create Document Templates* on page 499.

Telephone Campaign

You may choose to incorporate a telephone CAMPAIGN into your renewal strategy, either as a front-line renewal CAMPAIGN for your entire donor base, or for just a segment of your CONTACTS list. You might also choose to implement a telephone CAMPAIGN in subsequent rounds of a follow-up CAMPAIGN to renew lapsed donors.

Here are steps you might follow to perform a donor renewal CAMPAIGN by telephone. The steps are quite similar to those for a direct mail CAMPAIGN (see *Renewal Campaign – Direct Mail* on page 130).

- ✔ Create a new CAMPAIGN, e.g. 2005 Annual Renewal (see *Campaigns* on page 128).
- ✔ Identify donors who renewed in response to your last annual CAMPAIGN:
  - Generate the *Donations - by campaign* report, to report on last year's CAMPAIGN *or* search in the DONATIONS list to find all the donations for a campaign
  - Send the report to a file *or*, from the DONATIONS list, export donor CONTACT IDs to a file. The reports contain CONTACT IDs in their first column, and will be treated as a source of CONTACT IDs for generating merged documents from document templates.
  - Alternatively, if you track renewal dates for your CONTACTS, select the *Contacts - by renewal date* report, and send it to a file, or search in the

CONTACTS list for the appropriate renewal dates and export the CONTACT IDs to a file.

- ✔ Produce a CONTACTS list to provide to the people who will be making the phone calls:
  - Open the CONTACTS list. Search to produce a list of the CONTACTS in the report file produced in the previous step.
  - Export this list of CONTACTS to a file, including whatever fields your phone solicitors want. Alternatively, the Info Summary report (available directly from the CONTACTS list Report menu) is particularly useful since it includes phone numbers and also recent donation history. As another alternative, search to find the relevant CONTACTS in the CONTACTS list, and then use the Export or Print button to print the appropriate columns.
- ✔ Conduct the telephone CAMPAIGN.
- ✔ Record all telephone COMMUNICATIONS, being sure to associate them with the CAMPAIGN.
  - Have telephone staff use Sumac, and directly record their COMMUNICATIONS.
  - Alternatively, phone activity can be put into a tab-delimited text file or spreadsheet and then imported into Sumac's database using the Import command. The file should contain at least these columns: CONTACT ID or name, date of the COMMUNICATION, COMMUNICATION type, CAMPAIGN, and notes about the COMMUNICATION.
- ✔ Process DONATIONS received in response to the mailing. Be sure to note the CAMPAIGN on each DONATION.
- ✔ To find out how much money was raised and who donated to the renewal CAMPAIGN, use the *Donations - by campaign* report.
- ✔ Use the *Campaign - communications and donations* report to determine which CONTACTS were phoned but did not donate to the CAMPAIGN.

Door-to-Door Solicitation

If your organization performs door-to-door solicitations, it is most helpful if canvassers have good information about the residents of the places they canvas.

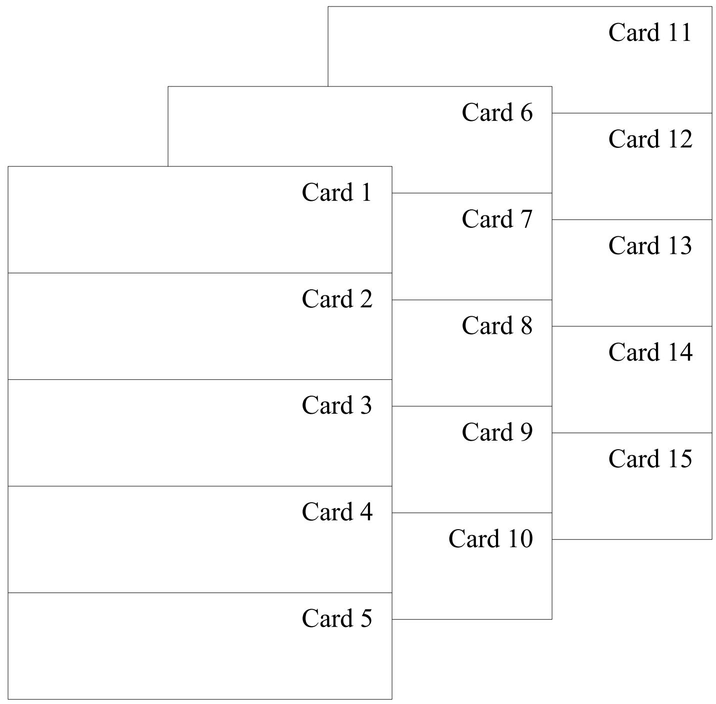
The Info Summary report, available directly from the CONTACTS list, is designed to provide the information needed by a door-to-door canvasser. It provides name and address information, as well as recent donation history and COMMUNICATION preferences.

To prepare information cards about CONTACTS in a particular geographical area:

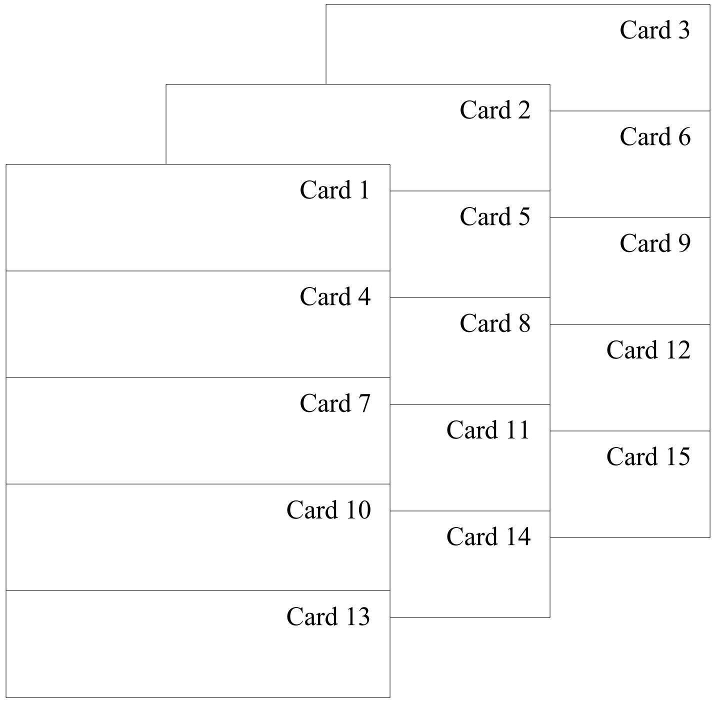
- ✔ Show the CONTACTS list.
- ✔ Generate a list for each canvasser.
  - Search to find a list of CONTACTS for each canvasser. A search by postal code is a good way to find CONTACTS in a particular area.
  - Display each CONTACT's street address in the CONTACTS list. Click the title of the street address column. Sumac sorts by street, and within each street it sorts by numbers on the street. This groups CONTACTS by street, probably most convenient for canvassers.
- ✔ If you do not want to print information cards for all the CONTACTS showing in the list, select the subset to be printed.
- ✔ Choose Info Summary from the Report menu in the CONTACTS list. This asks if you want to alter the print order for convenience of cutting.
- ✔ Here is what this question means. If you are printing many Info Summary cards, you may intend to cut them and give a pile of cards to one or more

solicitors. If you do not change the order, then info summary cards are printed five per page with the first five on the first page, the next five on the next page, and so on. If you change the order, then Sumac prints the first cards in the first position on subsequent pages, then moves down a position on the page and prints the next cards in that position. Here are some illustrations:

- If you do not change the print order, three pages of cards would be printed like this:



- If you *do* change the print order, the same 15 cards print on three pages like this:



✔ Once you have answered the question about print order, Sumac prints a summary card for each selected CONTACT.

Move Donors Up The Donor Pyramid

Your organization wants to increase the gifts from existing donors; in other words, move donors *up* the donor pyramid. There are a number of clues to look for in your donor base to identify donors that may be moved up to higher levels by making informed, targeted asks.

Sumac's Prospect Rating feature helps greatly in identifying the CONTACTS who are most likely to donate. In addition, several reports can help you identify your best prospects. For example:

- *Donations - in date range*: This report identifies donors who have given frequently and recently.
- *Donations - in date and amount ranges*: This report identifies CONTACTS who have given in a particular time period and in a particular dollar range. Use this report to identify candidates for a monthly donor program.
- *Donations - first time donors*. This report identifies new and one-time donors from your list of CONTACTS. You may wish to:
  - quickly follow up recent DONATIONS with a second, targeted request;
  - alert your board about these new donors in case they can spot a connection; and
  - put the CONTACT on a program of COMMUNICATIONS designed to move the CONTACT to a higher level – moves management.
- *Donors - returning donors*. This report identifies donors who stopped giving and then resumed giving later. Special follow-up, much like for first time donors, is appropriate.
- *Donations - compare two time periods*, *Donations - compare three time periods*, *Donations - compare 10 years*. These reporst compare donations from individual donors in multiple time periods. They show variances

which enable you to identify emerging donors (those whose donations are increasing) as well as donor slippage (donations declining over time). Experiment with a variety of time periods and note where you find interesting variance. Follow up by reviewing individual DONATIONS. Often a donor who has consistently given the same or a slightly increasing amount is a good candidate for moving up the pyramid.

Once you have identified some CONTACTS appropriate for a moves management program, Sumac Reminders provides action plans that let you plan and track a program of targeted COMMUNICATIONS to implement moves management.

Monthly Giving

A monthly giving program often produces higher levels of DONATIONS from the participating CONTACTS. Sumac can help you identify long time consistent donors who make ideal candidates for monthly giving.

Run the *Donations – compare 10 years* report. It shows consistent givers, as well as indicating trends for each donor.

Once you have identified CONTACTS, and they have agreed to participate in the monthly giving program, use Sumac Pledges to efficiently manage your monthly donor program. This can be combined with Sumac Payment Processing to enable very efficient creation of payment records and automate processing of credit cards.

Major Gifts

Every organization has CONTACTS with the potential to make significant gifts. The key to a successful major gifts programs lies in the ability to identify prospects and implement a timely cultivation strategy. Sumac provides you with the tools to track the appropriate background information for your CONTACTS and identify your best major gifts prospects.

Identify Major Gifts Prospects

Sumac's Prospect Rating feature helps greatly in identifying the CONTACTS who are most likely to donate. In addition, Sumac provides a number of reports that will help you to identify major gifts prospects:

- Use the *Donations – in date and amount ranges* report to identify CONTACTS who have given significantly and recently.
- Use the *Donations – compare two time periods* report, *Donations – compare three time periods* report, or the *Donations – compare 10 years* report to identify CONTACTS who have increased their level of giving significantly.
- Scan your *Donations – first time donors* report for significant first time DONATIONS.
- Use *Donations – in date range* to scan cumulative giving.
- Show all DONATIONS in the DONATIONS list, sorted by the CONTACTS' last names can help you identify frequent donors.

Moves Management

Once you have identified major gift prospects, develop and implement a plan to cultivate them. This plan is sometimes referred to as *moves management.* It involves constructing a list of detailed stewardship activities and COMMUNICATIONS for each prospect.

Use Sumac Reminders to schedule, assign and track activities such as special invitations to upcoming events, calls to request meetings, and other

COMMUNICATIONS. The action plans capability of Sumac Reminders is particularly useful for implementing moves management.

Reporting

Sumac provides several reports that can help track fundraising gains against your periodic and year end targets.

- CAMPAIGN reports produce summary or detailed information about individual CAMPAIGNS. You can also compare the results of two CAMPAIGNS (perhaps last year's renewal CAMPAIGN and this year's renewal CAMPAIGN).
- DONATION reports provide many different ways to consider your progress:
  - by CAMPAIGN
  - by event
  - by time period: compare two or three time periods, perhaps the first quarter of this and last year.
- PLEDGE reports enable you to assess your success in collecting on PLEDGES. These reports also enable you to forecast future revenue based on pledged DONATIONS.

Campaigns

Introduction

The CAMPAIGNS list enables you to define segments of CONTACTS, break them into sub-segments (child CAMPAIGNS), and include or exclude them from mailings and other forms of COMMUNICATIONS.

Each CAMPAIGN can include search criteria (see *Search Builder* on page 485) which define the CONTACTS that are included in the CAMPAIGN.

Hierarchy, Cumulative Exclusion

CAMPAIGNS are defined hierarchically. A parent CAMPAIGN defines a list of CONTACTS, and this list of CONTACTS is then divided among the CAMPAIGN's children. CONTACTS identified in a parent CAMPAIGN are allocated to the child CAMPAIGNS by this process:

- Allocate some CONTACTS to the first child based on the child's search criteria, removing them from the list defined in the parent.
- Move to the second child, repeating the process of examining its search criteria and allocating some of the parent CAMPAIGN's remaining CONTACTS to the second child, but do not allocate any that were allocated to the first child.
- Repeat with all subsequent children, never allocating any one CONTACT to more than one child CAMPAIGN.

Types

In Sumac, a CAMPAIGN can be of a specified type. These types help you keep track of different types of CAMPAIGN-relevant information. Here are the types available:

Campaign	Usually a container for *exclusions* and *packages*.
Solicitation	*Solicitation* is a synonym for *campaign*. Some people consider a *solicitation* to be part of a *campaign*, some consider a *campaign* to be part of a *solicitation*. Sumac allows either approach.
Exclusion	A segment of CONTACTS who are *not* to be solicited by a CAMPAIGN.
Package	A segment of CONTACTS who are going to be solicited (perhaps by a mailed-out package) by the CAMPAIGN.

Finalization

While you are creating a structure for your CAMPAIGN, defining conditions for including and excluding CONTACTS, the inclusion and exclusion is expressed by means of search criteria specified using Search Builder (see *Search Builder* on page 485).

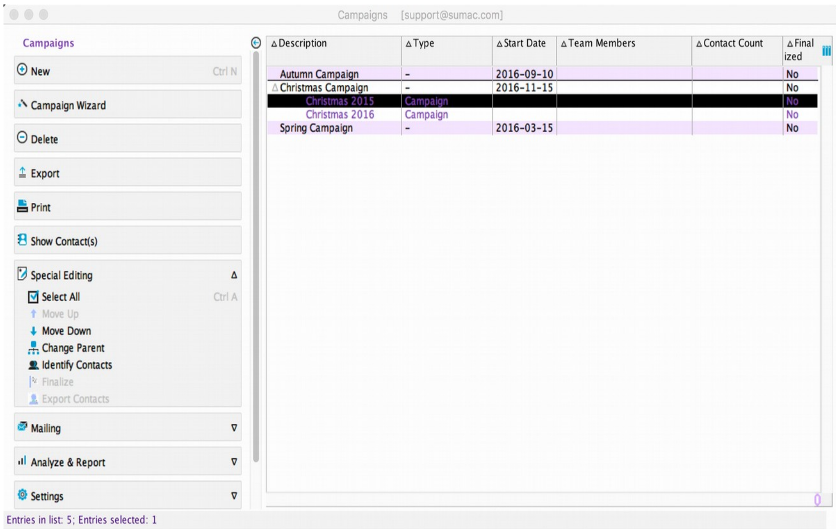
This way of identifying the CONTACTS adapts over time. For example, if one exclusion condition is "does not want to receive email", you can define that condition today and all CONTACTS who do not want email are excluded. But if CONTACTS' COMMUNICATION preferences change over the next few weeks before you launch the CAMPAIGN, the list of excluded CONTACTS will be updated: CONTACTS are excluded by doing a search at a particular instant in time, thereby recognizing changes to the database between the time the condition is originally defined and the time that it is actually used to do a mailing.

However, before you actually start to distribute a package, you must finalize the list. This changes the CAMPAIGN so that instead of identifying its members by means of search criteria, it identifies them by means of a list of specific CONTACT

IDs. When you finalize a CAMPAIGN's list of CONTACTS, the list no longer changes, so in future you know for certain who was in and who was out of a particular CAMPAIGN.

The Campaigns List

CAMPAIGNS that show dimmed (grey) in the CAMPAIGNS list are inactive. The status bar at the bottom of the CAMPAIGNS list shows the total revenue targets for all the campaigns and for the selected ones.



Buttons

Move Up Button

Move a CAMPAIGN one position higher in the list of CAMPAIGNS within the same parent.

Move Down Button

Move a CAMPAIGN one position lower in the list of CAMPAIGNS within the same parent.

Change Parent Button

If you wish to change the parent-child structure of your CAMPAIGNS, this button lets you relocate a CAMPAIGN to have a different parent. You may also specify that the selected CAMPAIGN should not be the child of any other CAMPAIGN, so it becomes a top-level CAMPAIGN.

Campaign Wizard Button

For further information, see *Campaign Wizard* on page 145.

Identify Contacts Button

Show values in the Contact Count column for the selected CAMPAIGN and its children.

Show Contacts Button

Show all the CONTACTS identified by the CAMPAIGNS that are children of the selected CAMPAIGN. This button produces a dialog that shows the CONTACTS grouped by CAMPAIGN, and enables you to export the list to a file for further analysis.

Finalize Button

Finalize a selected CAMPAIGN, so that instead of having a changeable list of CONTACTS identified by search criteria, it uses a fixed list of specific CONTACT IDs. A CAMPAIGN is usually finalized just before a package is sent out.

Mail Merge Button

Perform Mail Merge using the CONTACTS identified by the selected CAMPAIGN. The selected CAMPAIGN must be finalized and must be a package. See *Mail Merge* on page 479.

Labels/Envelopes Button

Generate labels or envelopes for the CONTACTS identified by the selected CAMPAIGN. The selected CAMPAIGN must be finalized and must be a package. See *Labels, Envelopes, and Name Tags* on page 469

Send Bulk Email Button

Click to choose a CAMPAIGN to whose CONTACTS you wish to send an email. Note that the selected CAMPAIGN must be finalized and must be a package. Then click the Send Bulk Email button to do the mailing. For further information on emailing, see *Email* on page 400.

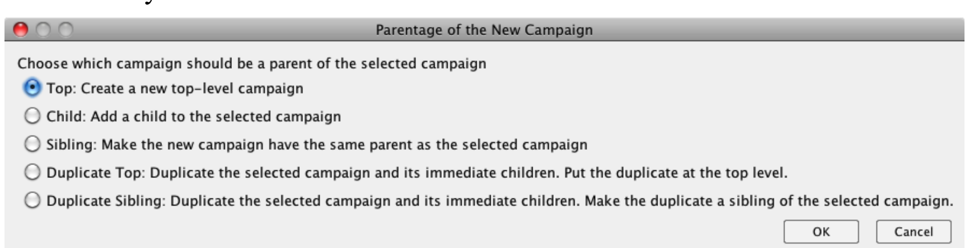
Export Contacts Button

Export information about the CONTACTS identified by the selected finalized CAMPAIGN.

Enter Campaigns

Choose Position In Hierarchy

Because CAMPAIGNS are hierarchical, when you click the New button to create a CAMPAIGN, this dialog appears, asking you about the new CAMPAIGN's position in the hierarchy:



Depending on what was selected in the CAMPAIGNS list when you clicked the New button, some of the radio buttons may be disabled.

Here is an explanation of each of the options. For the purposes of this explanation, assume that when the New button was clicked:

- the CAMPAIGNS list was showing these three top level CAMPAIGNS,
- *Top-Level Two* was expanded to show its three children, and
- second child, *Child B*, was selected.

So the CAMPAIGNS list looks like this:

```
Top-Level One
Top-Level Two
Child A
Child B
Child C
Top-Level Three
```

Here is what each of the parentage radio buttons does:

Option Chosen	*Resulting Campaign List*	*Explanation*

Top	`Top-Level One`
	`Top-Level Two`
	`      Child A`
	`      Child B`
	`      Child C`
	`Top-Level Three`
	`New Campaign`
		A completely new CAMPAIGN is created and added to the end of the CAMPAIGNS list. The new CAMPAIGN is a top level CAMPAIGN with no children.

Child	`Top-Level One`
	`Top-Level Two`
	`      Child A`
	`      Child B`
	`            New Campaign`
	`      Child C`
	`Top-Level Three`
		A completely new CAMPAIGN is created and inserted as a child of the selected CAMPAIGN.

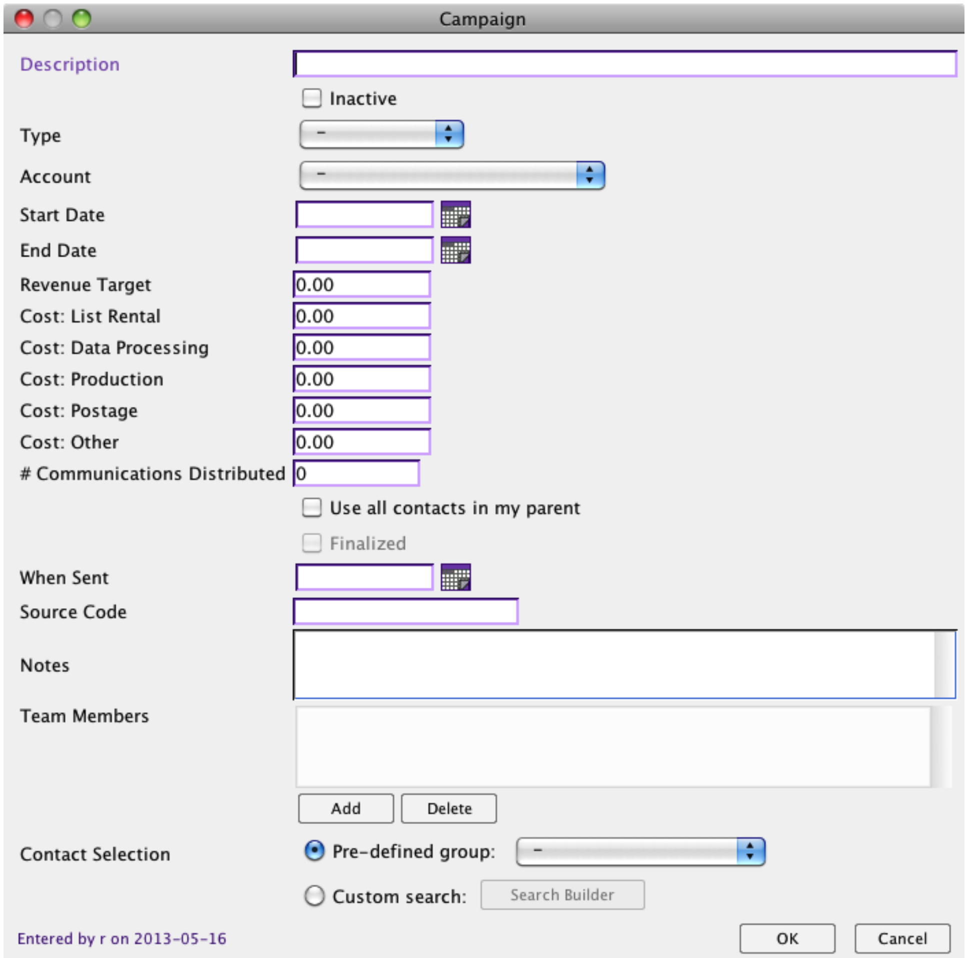
Sibling	`Top-Level One`
	`Top-Level Two`
	`      Child A`
	`      Child B`
	`      Child C`
	`      New Campaign`
	`Top-Level Three`
		A completely new CAMPAIGN is created and inserted as a child of the parent of the selected CAMPAIGN.

Copy Top	`Top-Level One`
	`Top-Level Two`
	`      Child A`
	`      Child B`
	`      Child C`
	`Top-Level Three`
	`New Campaign`
		A new CAMPAIGN is created based on the selected CAMPAIGN (*Child B*). This new CAMPAIGN is added to the end of the CAMPAIGNS list, and is a top level CAMPAIGN. If the selected CAMPAIGN had children (not shown in illustration), then these would also be copied and inserted as children under *New Campaign*.

Copy Sibling	`Top-Level One`
	`Top-Level Two`
	`      Child A`
	`      Child B`
	`      Child C`
	`      New Campaign`
	`Top-Level Three`
		A new CAMPAIGN is created based on the selected CAMPAIGN (*Child B*). This new CAMPAIGN is inserted as an additional child of the parent of the selected CAMPAIGN. If the selected CAMPAIGN had children (not shown in illustration), then these would also be copied and inserted as children under *New Campaign*.

Enter Details About The New Campaign

After you choose the new CAMPAIGN's position in the hierarchy, you use this dialog to enter details about the CAMPAIGN itself:



Here are explanations of the fields in a CAMPAIGN:

Field	*Content*
Description	A textual description of the CAMPAIGN. This is the description that is presented when one is choosing a CAMPAIGN to be associated with another database entry (e.g. a DONATION).
Inactive	An inactive CAMPAIGN appears grey in the CAMPAIGNS list and can be edited only by a Sumac administrator. Only a Sumac administrator can make a CAMPAIGN inactive. An inactive CAMPAIGN cannot be related to new information in the database (e.g. COMMUNICATIONS, DONATIONS).
Type	A CAMPAIGN may one of the following types: Campaign, Solicitation, Package, Exclusion. In Sumac, *Campaign* and *Solicitation* are considered to be synonyms. A *Package* indicates a list of CONTACTS who are to receive a particular type of mailing or other communication. An *Exclusion* defines a list of CONTACTS who are not to be contacted for the purposes of this CAMPAIGN.

Field	*Content*
Account	You can specify which account should be used for donations to this campaign. If a user chooses this campaign while entering a new donations record, then the account field of the donations is filled in automatically.
Start Date, End Date	When the CAMPAIGN starts and ends.
Revenue Target	If you have a revenue target for the CAMPAIGN, enter it here. This can later be compared to actual DONATIONS received for the CAMPAIGN.
Costs	Costs of various types that may have been incurred in doing this campaign.
# Communications Distributed	How many communications were distributed as part of this campaign.

<table>
<tr><th>Field</th><th>Content</th></tr>
<tr><td>Use all contacts in my parent</td><td>
This check box causes Sumac to reset the universe of contacts available to a campaign. Instead of the campaign having as its universe the contacts that have not been added to the list of any prior campaign within the same parent, choosing this check box causes the universe to be all the contacts in the campaign's parent.
Here is an example. Assume that a campaign has a universe of 100 contacts. These are being allocated sequentially to four child campaigns as follows:
<table>
<tr><th>child</th><th>size of child's universe</th><th>number included in child</th></tr>
<tr><td><code>Exclusion</code></td><td><code>100</code></td><td><code>20</code></td></tr>
<tr><td><code>Package A</code></td><td><code>80</code></td><td><code>55</code></td></tr>
<tr><td><code>Package B</code></td><td><code>25</code></td><td><code>10</code></td></tr>
<tr><td><code>Remainder</code></td><td><code>15</code></td><td><code>15</code></td></tr>
</table>
If the Use all contacts in my parent check box were chosen for the Package B campaign, then the example would change as follows, providing the full universe of 100 contacts to Package B, instead of the just the 25 not already taken by Exclusion and Package A:
<table>
<tr><th>child</th><th>size of child's universe</th><th>number included in child</th></tr>
<tr><td><code>Exclusion</code></td><td><code>100</code></td><td><code>20</code></td></tr>
<tr><td><code>Package A</code></td><td><code>80</code></td><td><code>55</code></td></tr>
<tr><td><code>Package B</code></td><td><code>100</code></td><td><code>70</code></td></tr>
<tr><td><code>Remainder</code></td><td><code>30</code></td><td><code>30</code></td></tr>
</table>
Note that in this example, Package A and Package B have, between them, 125 contacts, even though there are only 100 in total. This means that some contacts will receive two packages. This may be intended, but it may not be, so be particularly careful when using Use all contacts in my parent.
One common use of Use all contacts in my parent is in multilevel campaigns. For example, suppose there is a campaign for 2006, and it has children: Spring and Summer. Each of Spring and Summer have children which consist of exclusions and packages. Within the 2006 campaign, all the contacts will be taken by the Spring campaign, leaving none for the universe of the Summer campaign. This problem is resolved by choosing Use all contacts in my parent in the Summer campaign so that it has the same universe as the Spring campaign.
</td></tr>
<tr><td>Finalized</td><td>When you use the Finalize button to finalize a campaign, Sumac automatically clicks this check box to indicate that the campaign is finalized. Finalization is discussed on page 138.</td></tr>
<tr><td>When Sent</td><td>This field records when a package was sent to the contacts who are supposed to receive it.</td></tr>
<tr><td>Source Code</td><td>If a package is a mailing, and each mail piece is distinguished with a source code, enter the code here. Later, when donations are received for the campaign, the donation can be linked to the campaign by means of the campaign source code.</td></tr>
<tr><td>Notes</td><td>Free-form notes.</td></tr>
</table>

Field	*Content*
Team Members	If you wish to keep track of responsibilities for different parts of a large campaign, you can list the people working on the campaign. Click the Add button to add to the list of team members, click the Delete button to remove one.
Contact Selection	A key part of each campaign is that it identifies a list of contacts. There are two ways to identify a list: ◆ specify a Pre-defined Group – a group that has already been defined and saved into the Sumac database ◆ construct a Custom Search using Search Builder to identify all the contacts who should be part of the campaign.

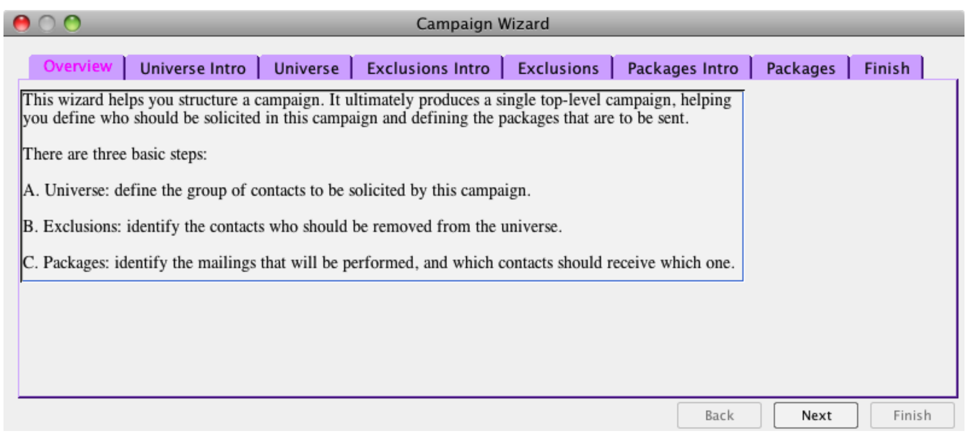
Campaign Wizard

Introduction

The Campaign Wizard assists you in setting up a campaign. The basic structure of the campaign that is created is as follows:

- a parent campaign that defines the universe – the overall group of contacts being solicited by this campaign,
- child campaigns which exclude various groups of contacts from the campaign, and
- child campaigns which segment the remaining contacts (after the exclusions are removed from the universe) to receive packages.

When you click the Campaign Wizard button in either the campaigns list dialog or the contacts list, this dialog appears:



The dialog has several tabs across the top. You can navigate between the tabs using any of these techniques:

- click the tab to go directly to an individual tab
- use alt-arrow keys to move left and right
- click the Next and Back buttons.

Here is what you will find in the tabs:

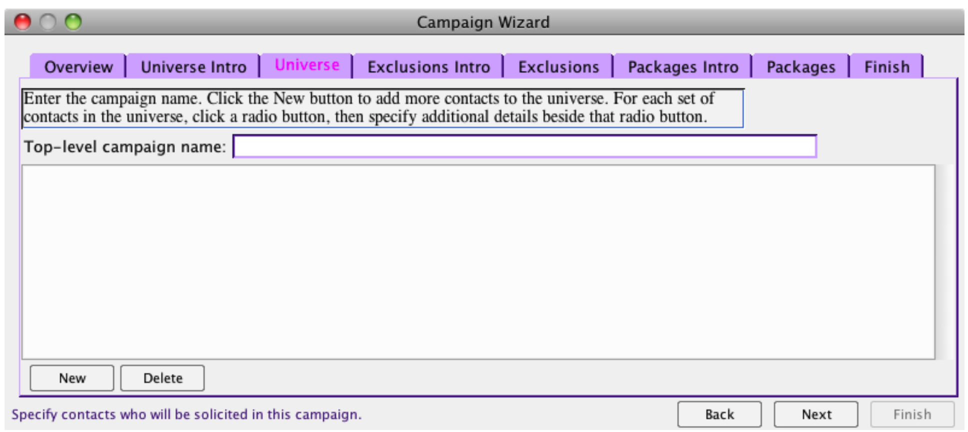
Tab	*Contents*
Overview	A general description of the wizard's functionality.
Universe Intro	An explanation of what is in the Universe tab.

Tab	*Contents*
Universe	A scrolling list of inclusion criteria for defining the overall list of CONTACTS to be considered for this CAMPAIGN.
Exclusions Intro	An explanation of what is in the Exclusions tab.
Exclusions	A scrolling list of exclusion criteria, and buttons for adding to the list.
Packages Intro	An explanation of what is in the Packages tab.
Packages	A scrolling list of criteria for breaking the list of CONTACTS into segments which will receive different treatment, and buttons for adding to the list.
Finish	Click Finish to cause Sumac to create the CAMPAIGN and its children and save the CAMPAIGN into the database.

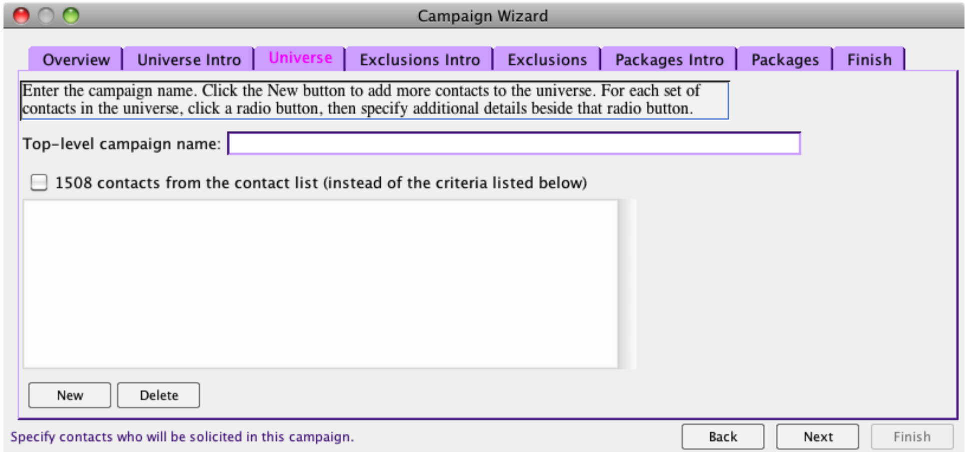
Universe Tab

This tab lets you do two things:

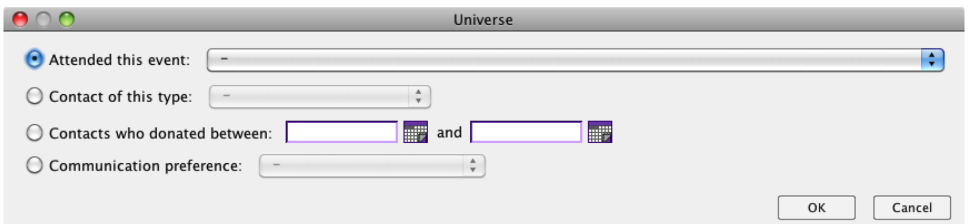
- specify the name of the top level CAMPAIGN that is being created
- specify the way Sumac should identify CONTACTS to be included in this CAMPAIGN.



If, when you started the Campaign Wizard, the CONTACTS list was open, then there is an additional check box in the universe tab that enables you to indicate that the universe for the CAMPAIGN should be all the CONTACTS who were showing in the CONTACTS list when you clicked the Campaign Wizard button. This is what the universe tab looks like with the extra check box:



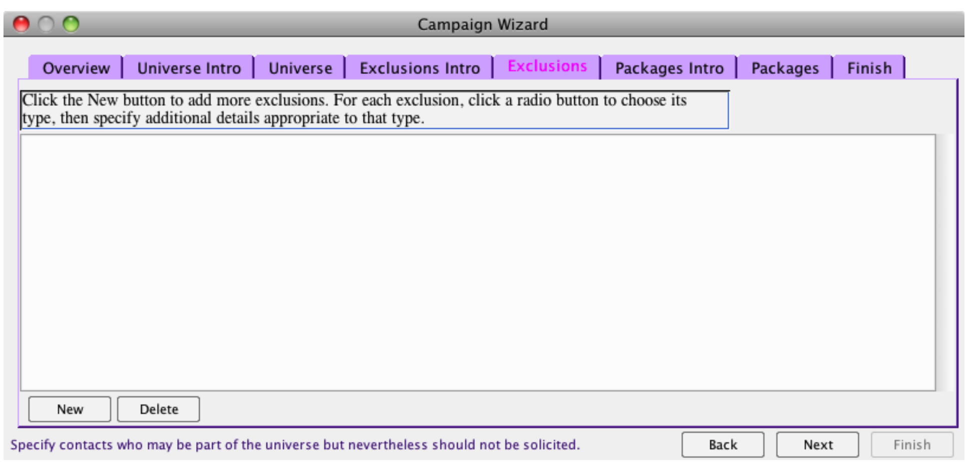
In order to specify an inclusion, indicating which CONTACTS should be in the CAMPAIGN, click New. This dialog appears:



You choose the CONTACTS to be included by clicking one of the radio buttons, then filling in its details. For example, if the CAMPAIGN is addressed to everyone who donated last year, click *Contacts who donated between* then specify the start and end dates for the range of DONATIONS.

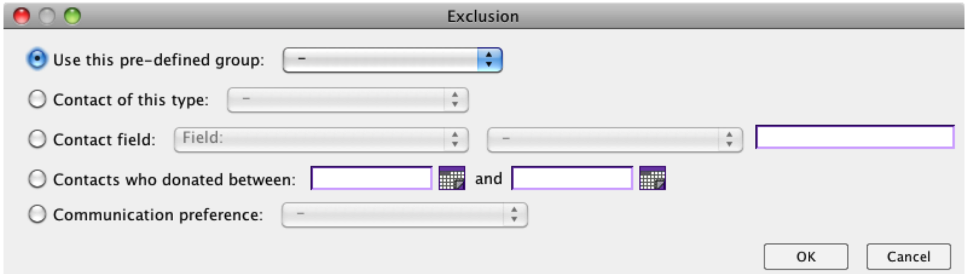
Exclusions Tab

This tab shows you a list of exclusions.



Click New to add an exclusion to the list, click Delete to remove a selected exclusion from the list.

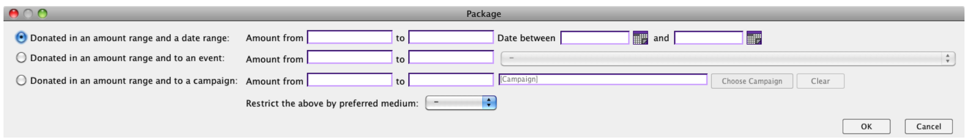
When you click New, this dialog appears:



Click one of the radio buttons to indicate which type of exclusion you want, then fill in the details beside the radio button. Click OK to add the exclusion to the list of exclusions in the Campaign Wizard dialog.

Package Tab

This tab presents a list of packages (segments of the list of CONTACTS who will be treated differently in the CAMPAIGN). As with the Exclusion tab, you can click the New button to define new packages. When you click New, this dialog appears:



Click a radio button to define a segment of the CONTACTS. Then specify the details associated with the chosen type of package. Click OK to add the package to the list of packages in the wizard dialog.

Finish Tab

When you reach this tab, click the Finish button, and Sumac creates the specified top level CAMPAIGN which defines the universe, and all the child CAMPAIGNS necessary to give effect to the exclusions and packages.

Sumac also adds an extra child CAMPAIGN as a final child of the top level CAMPAIGN, to ensure that the exclusions and packages identify everyone in its universe.

Case Management

Notes for the Sumac Administrator

The Case Management feature lets you define one or two types of records to hold case management information. The Utilities/Customize Database/Preferences window, Case Management tab lets you specify the names of the records and whether they are independent or linked to each other.

Because each organization approaches case management differently, Sumac's case management records are actually a special type of Grow-Your-Own record: completely customizable.

All the fields in your case management records are customizable. They can be customized by clicking Utilities/Customize Database/Set up Case Management in the Sumac console. For more information, see *Grow Your Own-Notes for the Sumac Administrator* on page 225.

Collections

Sumac can manage collections of objects. This is used by museums to organize their collections of artifacts. It is also used to manage archival collections of documents. Significant features include:

- Management of several independent collections in the same database.
- Integration with other features of Sumac.
- Use of multiple classification schemes. A well-known classification scheme is Nomenclature (Sumac supports both 3.0 and 4.0), which is available as part of Sumac to organizations that use Collections.
- Management of electronic media associated with collection objects. This enables you to connect any number of electronic documents – photos, text, movies – to each object in a collection.

Notes for the Sumac Administrator

Field Preferences

Use the Utilities/Customize Database/Field Preferences command in the Sumac console to:

- re-label fields
- completely remove fields from the user interface
- make fields mandatory, or
- determine which fields should appear on a website.

in Collection Object, Provenance, and Location records.

Lookup Lists

When entering information about objects in collections, the following lookup lists (for more detail see *Lookup Lists* on page 592) are relevant.

- Acquisition Statuses
- Buildings
- Collections
- Colours
- Content Types
- Curatorial Note Types
- Exhibit Types
- File Types
- Insurance Action Types
- Materials
- Measured Attributes
- Location Statuses
- Location Types
- Object Relations
- Provenance Types
- Rooms
- Set/Group Types
- Schemas
- Shipping Methods
- Techniques
- Units Of Measurements

Preferences

When users identify files that are related to collection objects, Sumac moves the files to a standard place in your file system. Sumac forms this file system location by doing a mail merge on a template which has variables embedded in double angle brackets <<...>>.

Use the Utilities/Customize Database/Preferences command in the Sumac console. Click the Collections tab. Enter the desired template for the file structure for managing electronic documents associated with your collection objects.

Here are the variables allowed in templates for media file locations:

Variable	*Description*
object_id	The ID of the object the that file is associated with.
object_id_2	The ID of the object, with last 2 digits changed to 0. If the object ID is not 2 digits long, then this variable produces “00”.
object_id_3	The ID of the object, with last 3 digits changed to 0. If the object ID is not 3 digits long, then this variable produces “000”.
object_id_4	The ID of the object, with last 4 digits changed to 0. If the object ID is not 4 digits long, then this variable produces “0000”.
object_id_5	The ID of the object, with last 5 digits changed to 0. If the object ID is not 5 digits long, then this variable produces “00000”.
collection_id	The ID of the collection that holds the object with which the file is associated.
collection_id_2	The ID of the collection that holds the object, with last 2 digits changed to 0. If the object ID is not 2 digits long, then this variable produces “00”.
collection_id_3	The ID of the collection that holds the object, with last 3 digits changed to 0. If the object ID is not 3 digits long, then this variable produces “000”.
collection_id_4	The ID of the collection that holds the object, with last 4 digits changed to 0. If the object ID is not 4 digits long, then this variable produces “0000”.
collection_id_5	The ID of the collection that holds the object, with last 5 digits changed to 0. If the object ID is not 5 digits long, then this variable produces “00000”.
collection_name	The name of the collection that holds the object.
full_file_name	The full name of the file.
file_name	The name of the file with its suffix removed. For example, if the full name of the file is *picture.jpg*, then file_name is *picture*.
file_suffix	The suffix of the file name. For example, if the full name of the file is *picture.jpg*, then file_suffix is *jpg*.
user_login_name	The name of the user who is entering the file into the collection.

Windows Example

Here is an example of a file system path template that could work in a Windows environment:

```
H:\CMImages\<<object_id_2>>\<<object_id>>\<<full_file_name>>
```

Based on this example template, a file named topView.jpg, related to collection object with ID 345, would be put into the following place:

```
H:\CMImages\300\345\topView.jpg
```

Macintosh and Linux Example

Here is an example of a file system path template that could work in a Macintosh environment:

```
/Users/Shared/CMImages/<<object_id_2>>/<<object_id>>/<<full_file_name>>
```

The Collection Objects List

The collections object list works like other lists in Sumac. A couple of interesting points:

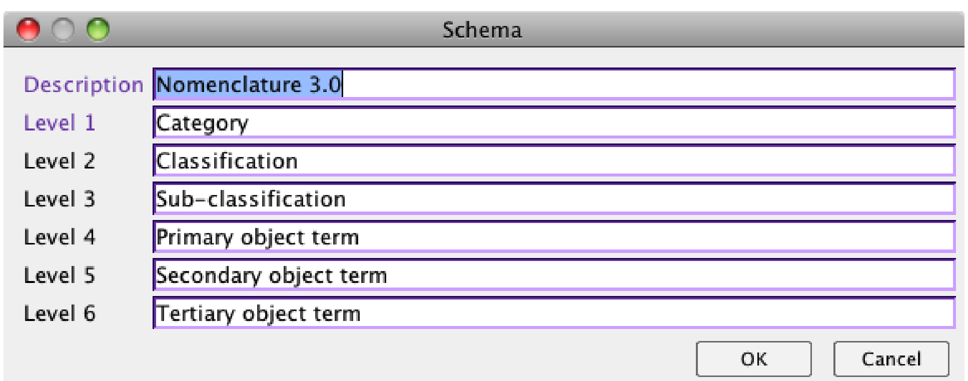
- You can display objects' thumbnail pictures as a column. Grow the height of each line (by dragging the black line on the bottom of the first record being displayed) to show the whole image
- A *Summary (Art Object)* can be displayed in the collection objects list window. It shows a summary of a collection object in a format commonly used for works of art (artist, title, year created, medium, dimensions).

Importing Nomenclature 3.0 or Nomenclature 4.0 into Sumac

If you want to use Nomenclature 3.0 or Nomenclature 4.0 to classify objects in your collection, ask your Sumac support person. You will be sent a file containing the complete Nomenclature classification scheme, ready to import into your Sumac database for everyday usage.

Define the Nomenclature Schema

- ✔ Choose the Utilities/Customize Database/Lookup Lists command in the Sumac console.
- ✔ Click the Collections area, then click the Schemas list.
- ✔ Click New and enter all the fields in a schema like this (in the first field enter either *Nomenclature 3.0* or *Nomenclature 4.0*, depending on which you are importing):

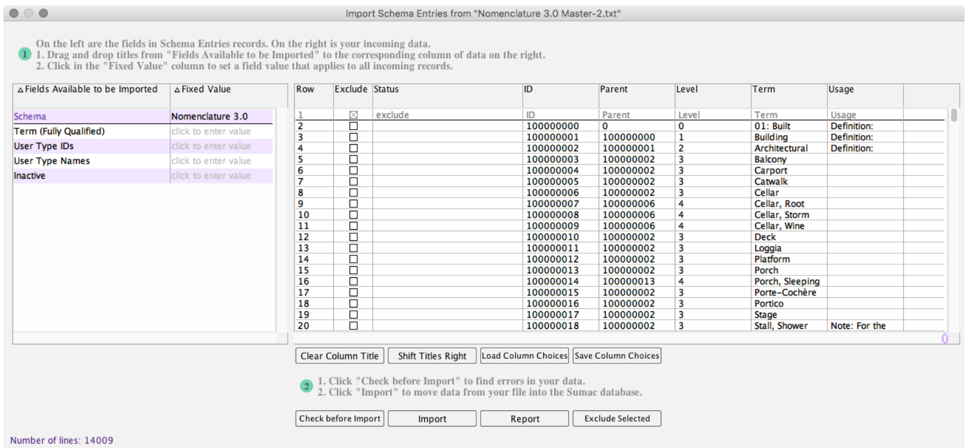


- ✔ Click OK to save the schema.
- ✔ Close the Lookup Lists window.

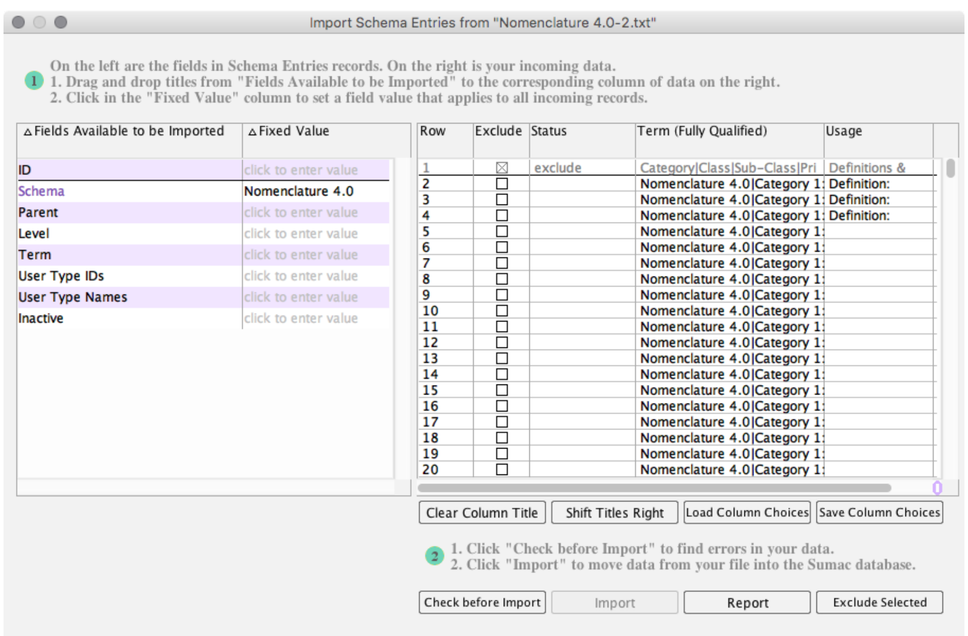
Import All the Nomenclature Entries

- ✔ Choose Utilities/Import/Import in the Sumac Console window.

- ✔ Choose Schema Entries from the *What is being imported* drop-down menu.
- ✔ Click the Choose button and select the file that contains the Nomenclature entries.
- ✔ Make sure the Exclude check box is set for the first row of titles.
- ✔ Click in the Fixed Value column to the right of the name Schema, and choose *Nomenclature 3.0* or *Nomenclature 4.0* from the drop-down menu, then click OK.
- ✔ Drag the field names from the left-hand Fields Available to Be Imported column, dropping the field name on the data in the corresponding column in the right-hand list of data.
  - For *Nomenclature 3.0* drag ID, Parent, Level, Term, and Usage. The window field column titles should look like this:



  - For *Nomenclature 4.0* drag Term (Fully Qualified), and Usage. The window field column titles should look like this:



- ✔ Click the Validate button. Sumac should tell you there are no errors.

- ✔ Click the Import button. Sumac should tell you how many records were correctly imported – over 14,000 – and that there were no errors.
- ✔ Quit Sumac.
- ✔ When you restart Sumac, the Nomenclature classification schema will be available for use.

Searching For Collection Objects

The collection object list allows you to combine searches based on:

Field	*What it Finds*
Collection/Collection 2	Collection objects can simulataneously be in up to two collections. Choose which collection is of interest, and Sumac finds where either collection field indicates the object is in the chosen collection.
Object Names	Specify the start of the object's name. Sumac searches in either of the two object name fields to find objects with the specified name.
Description	Search for text in the description field of the collection objects.
Object Number	Find objects with the specified object number.
Old/Other Object Number	Find objects with the specified other object number.
Acquisition Status	Search for objects with a chosen acquisition status.
Deaccession Date	Search for object deaccessioned in a date range.
Dated Notes	Specify text that occurs in a note associated with any dated attribute of the objects of interest.
Gender	Search for objects with the chosen gender.
Subject	Search for text in the subject field of the collection objects.
Curatorial Notes	Search for objects with the specified text in a curatorial note.
Title	Search for objects with the specified text in their title.
Pattern/Model	Search for objects with the specified text in their Pattern/Model field.
Set/Group Description	Search for objects with the specified text in their Set/Group Description field.
Set/Group Type	Search for objects with the specified Set/Group type.
Set/Group Part Count	Search for objects with the specified number of parts.

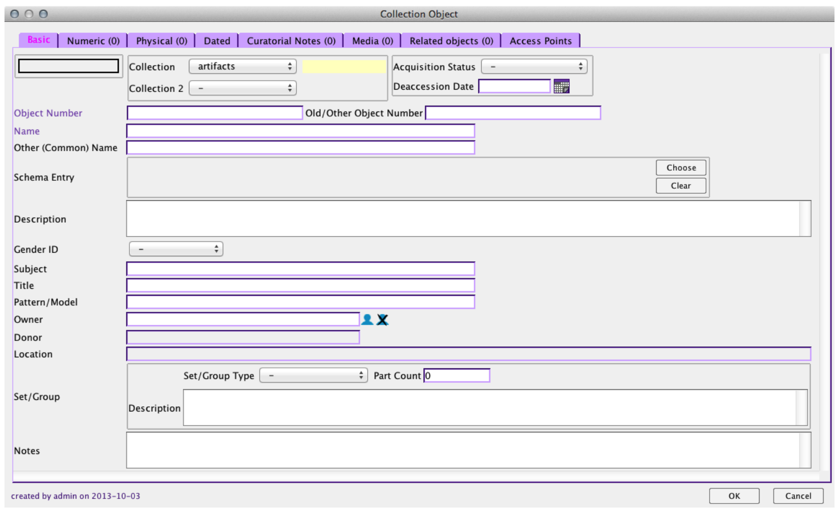
Field	*What it Finds*
Dated Notes	Search for objects with the specified text in any dated (conservation, insurance, location, provenance) note field.
Event	Find objects with Location records related to a particular event.
Event Type	Find objects with Location records related to a particular type of event.
Schema or Access Point	Choose a schema entry. Sumac finds objects which have this schema entry either as their key identifier or as an additional access point.
Curatorial Notes	Search to find objects with specified text in a curatorial note.
Curatorial Note Category	Search to find objects with a specified curatorial note category.
Curatorial Note Type	Search to find objects with a specified curatorial note type.
Schema or Access Point	Pick a particular schema entry, and Sumac finds objects that match that schema entry. Note that Sumac searches in both the schema entry chosen on the Basic tab of a collection object, and also searches any additional access points.
Owner	Find objects whose owner is a chosen contact.
Owner Last Name	Find objects whose owner's last name starts with the specified text.
Donor	Find objects whose donor is a chosen contact.
Donor Last/Company Name	Find objects whose donor's last name starts with the specified text.
Location	Specify the pieces of location information that you seek. Sumac finds objects at that location.
Creator	Find objects with provenance showing the specified creator contact.
Creator Last Name	Find objects whose creator's last name starts with the specified text.
Location	Find objects whose location matches the specified search criteria. Note that you can tell Sumac to find only objects whose *most recent* location matches the search, thereby finding objects that are currently in a particular place.

Field	*What it Finds*
Location Type	Specify the type of location (e.g. temporary exhibit) and Sumac finds objects that were at locations of that type.
Physical	Find objets with the specified material, colour, or technique properties.
Show All	Show all collection objects.

Editing Collection Objects

Basic

The Basic tab provides for the entry and display of basic descriptive information about the collection object:



Thumbnail: The rectangle in the top left shows a thumbnail picture of the object.

You can specify that the object is in one or two collections, and indicate its acquisition status. If the object has been de-accessioned, enter the date when this occurred.

Give the object one or two numbers.

Give the object a name. If there is another commonly used name for the object, then enter it too.

Choose the primary schema entry for classifying this object.

Enter a description and owner.

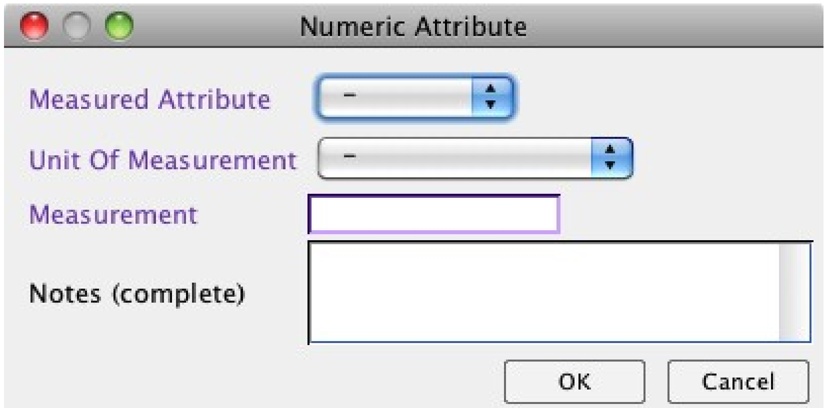
The Location is automatically filled in from the most recent Location attribute in the Dated tab. Donor is automatically filled in from the most recent Provenance attribute in the Dated tab.

If the object is a Set or Group, indicate the type of Set/Group, parts count, and list the parts in the Set/Group Description field.

Finally, if you need to make special notes, there is a field for that too.

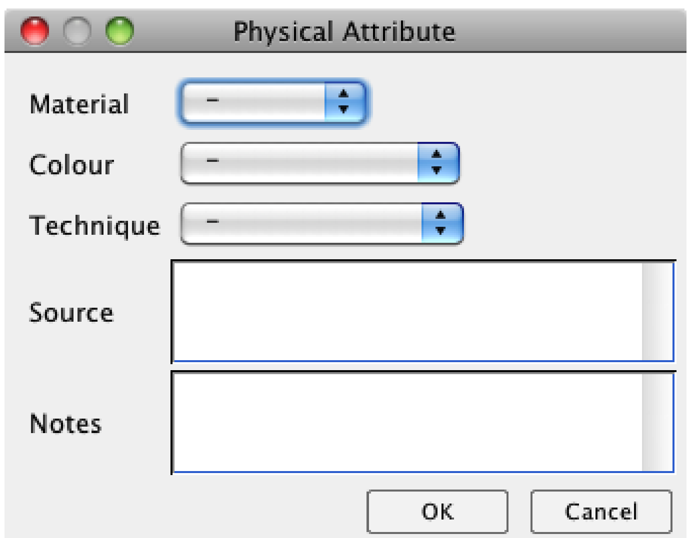
Numeric

This tab lets you enter a list of numeric attributes that describe a collection object.



Physical Attributes

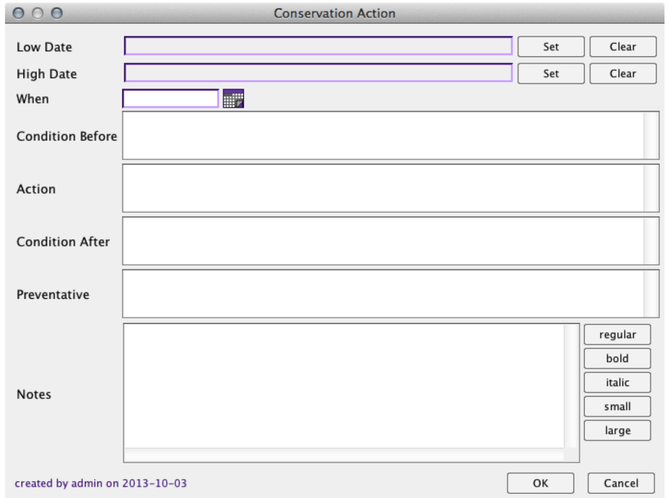
You can enter any number of physical attributes on this tab. Note that you may enter material, colour, and technique all in one attribute, or create separate attribute records for each of these.



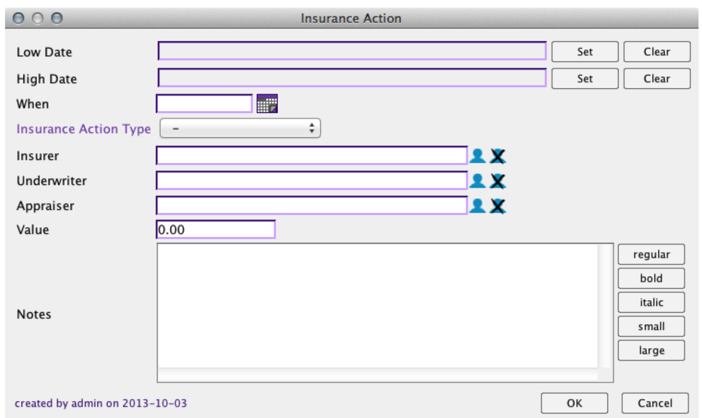
Dated

This tab allows you to specify various types of information which is dated, i.e. occurs at a particular time. This includes:

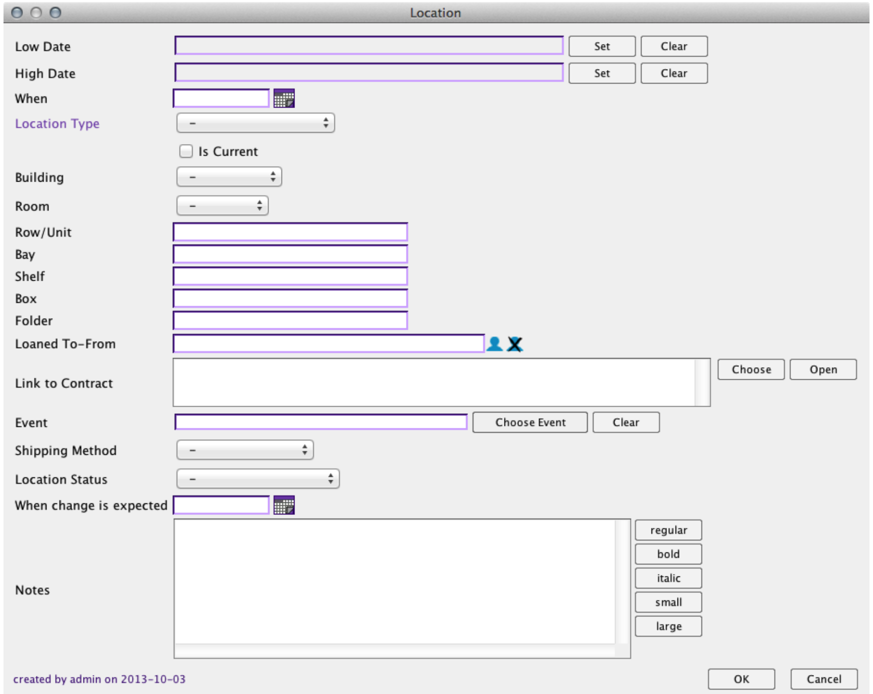
Conservation Actions



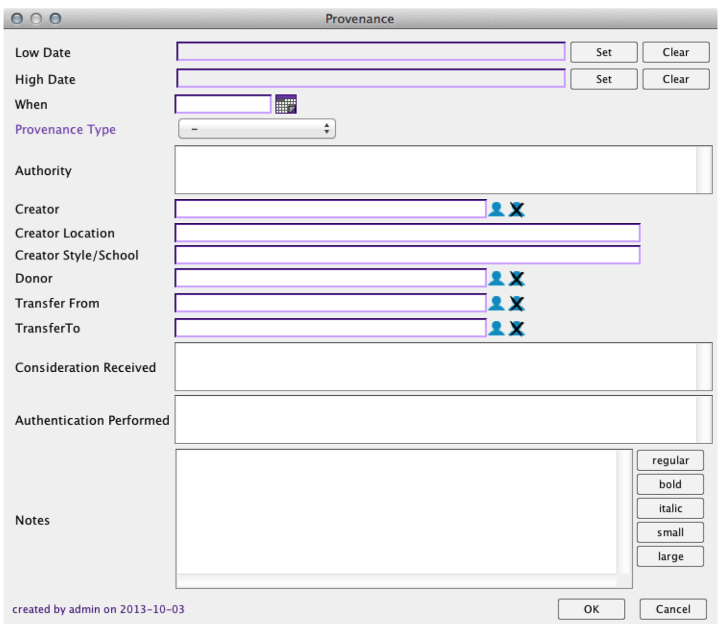
Insurance



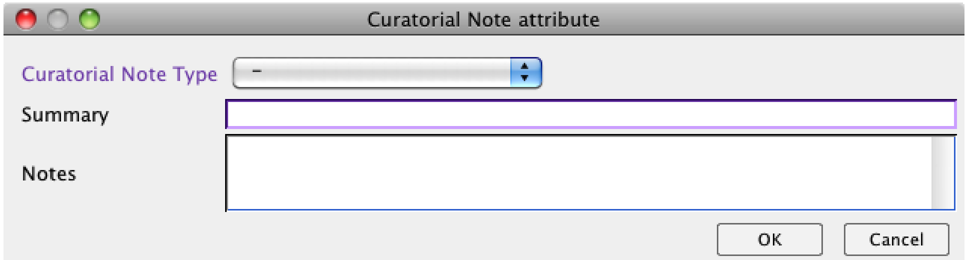
Changes of Location



Provenance

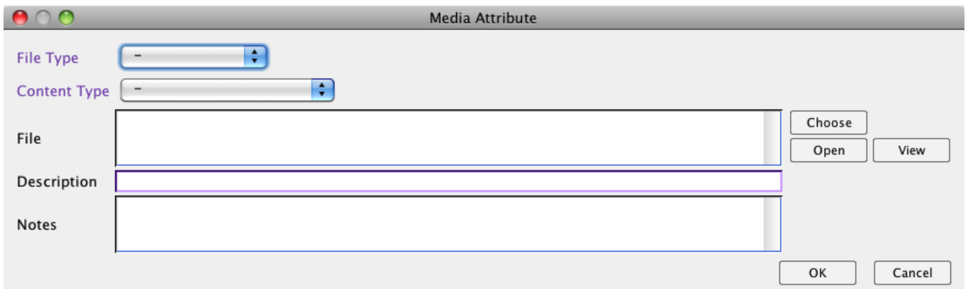


Curatorial Notes



Media

The Media tab lets you add as many media files as you wish to describe the collection object.

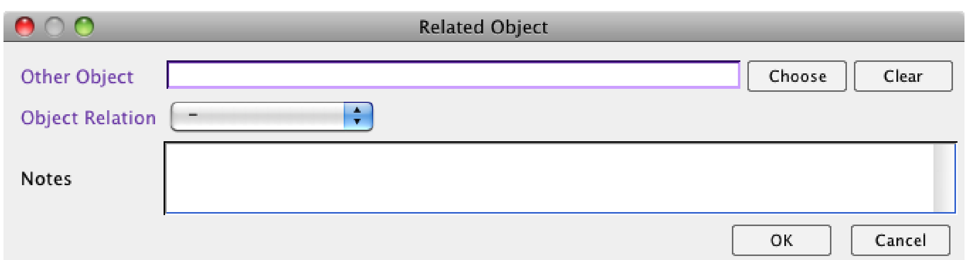


Note that this tab also has a Set Thumbnail button which allows you to specify which media file should be used to create a thumbnail picture to be displayed with the object.

Media File Location

When you choose a media file, you can tell Sumac to connect to the file where it exists. Alternatively, Sumac can move it to a set of file folders which it manages according to the structure rules defined by the Sumac Administrator (see *Notes for the Sumac Administrator* on page 150).

Related Objects



Access Points

Access points are actually schema entries. They provide additional index terms that can be used to find a collection object.

When you click to add a new access point, you get the standard window for choosing an entry in a schema. Pick the schema of interest then pick the entry within that schema.

Communications

Introduction

There are several ways your organization might interact with a CONTACT. You might send or receive email, phone calls, or paper mail. The CONTACT might attend one of your events. You might solicit DONATIONS or distribute fliers door-to-door. All these interactions can be recorded as COMMUNICATIONS.

Recording COMMUNICATIONS with a CONTACT or a group of CONTACTS is key to building better relationships. Recording COMMUNICATIONS in Sumac supports your goal of enhancing donor stewardship.

You can manually record a COMMUNICATION with a CONTACT at any time. For instance, one type of COMMUNICATION often recorded is attendance at an event: you could manually record each CONTACT who attended an event by creating a COMMUNICATION record that indicates the details of who attended the event and when. The Import command can also be used to create COMMUNICATION records from a list of CONTACT names.

Some Sumac commands automatically create COMMUNICATION records for you: for example, when you perform a REMINDER that was entered into Sumac, or when an email is sent using Sumac, the software automatically records the COMMUNICATION.

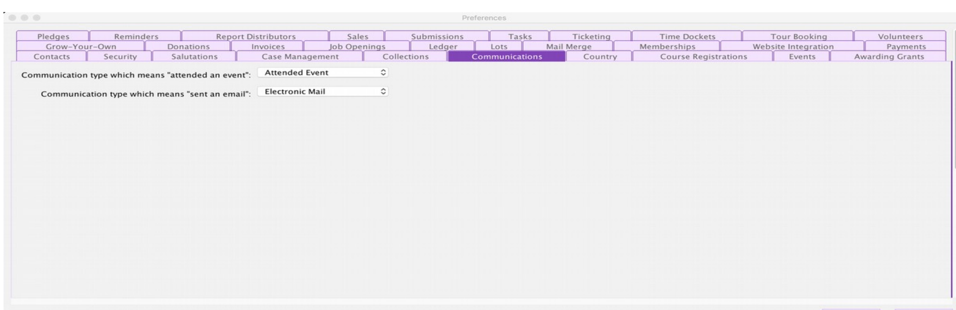
Notes for the Sumac Administrator

Preferences

Use the Utilities/Customize Database/Preferences command in the Sumac console to get the Preferences dialog.

The Security tab lets you click a checkbox to tell Sumac to log whenever a user creates or edits a communication record.

The Communications tab contains options that affect how COMMUNICATIONS appear to users:



Attendance Communication Type

Some searching and data presentation features of Sumac need to know which inbound COMMUNICATION type indicates that a CONTACT attended an event. Specify that COMMUNICATION type here.

Email Communication Type

When you send email, Sumac can automatically record the COMMUNICATION, and will set the type of the COMMUNICATION to the COMMUNICATION type chosen in this preferences tab.

Field Preferences

Use the Utilities/Customize Database/Field Preferences command in the Sumac console to:

- re-label fields
- completely remove fields from the user interface
- make fields mandatory, or
- determine which fields should appear on a website.

in Communication records.

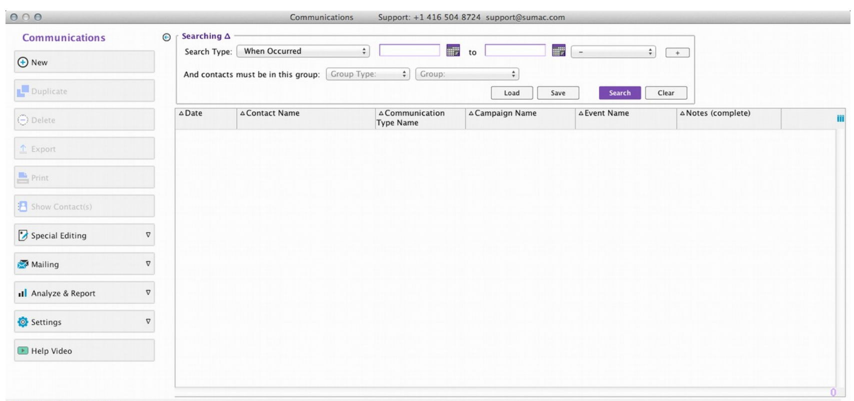
Extra Contacts

Normally each communication record is associated with a single contact – the contact with whom the communication occurred. If you want, each communication can be associated with two or three contacts.

If you specify a name for the first extra contact field, then an extra field is added to communication records. If you specify a name for both the first and second extra contact fields, then two extra fields are added to communication records.

> Hint: Having multiple contacts in a single communication record adds complexity to the user interface for communications. Do not use these extra contact fields unless you frequently need to record two or three contacts in a single communication record. If this is only occasionally needed, then users should create two communication records, one for each of two contacts.

The Communications List



Searching

Use the general control to specify what Sumac should do with the donations it finds. This enables more powerful multi-step searches. Here are the available types of searches that you can choose from the Search Type drop-down menu.

Search Criteria	*What Is Found*
When Occurred	Find communications that occurred in the specified date range.
Contact Last Name	Find communications to contacts whose last name starts with the entered text.
Contact	Find communications to a specific chosen contact.

Search Criteria	*What Is Found*
Household	Choose a household to find COMMUNICATIONS to that household or any of its members.
Event	Find COMMUNICATIONS that relate to the specified event.
Event Type	Find COMMUNICATIONS that relate to any event of the specified type.
Event Group	Find COMMUNICATIONS that relate to any event in the specified event group.
Communication Type	Find COMMUNICATIONS of the specified type.
Source	Find COMMUNICATIONS with the specified source.
Campaign and its Children	If you want to find COMMUNICATIONS that are associated with a particular CAMPAIGN, click the Choose button in the searching area to choose a CAMPAIGN. The name of the CAMPAIGN appears in the text field beside the Choose button.
Notes	This search criterion searches (in the first 255 characters of the Notes field) to find the text that you specify.
Entered By	Search to find COMMUNICATIONS entered by a particular user.

> Hint: If you are looking at the CONTACTS list, you can click the expansion icon for a CONTACT to see COMMUNICATIONS with that CONTACT.

Buttons

Show Contact(s) Button

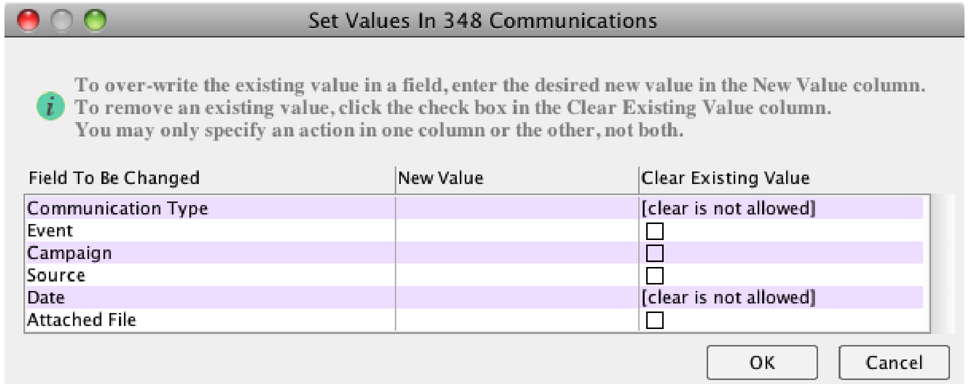
Click to select a COMMUNICATION. Then click this button to see the details about the CONTACT for the selected COMMUNICATION. If more than one CONTACT is identified by the selected records, then this button brings the CONTACTS list to the front and shows the selected CONTACTS.

Bulk Edit Button

This button enables you to change values in several fields of several COMMUNICATIONS all at once.

> Hint: Only users with bulk import capability can use this button.

When you click this button, there are warning dialogs that caution you to be very careful when setting values. Then this dialog appears:



Key in a new value for each field that you want to set. Click check boxes to indicate which fields are to be cleared (in contrast to being set to a new value).

When you click OK, the changes are made.

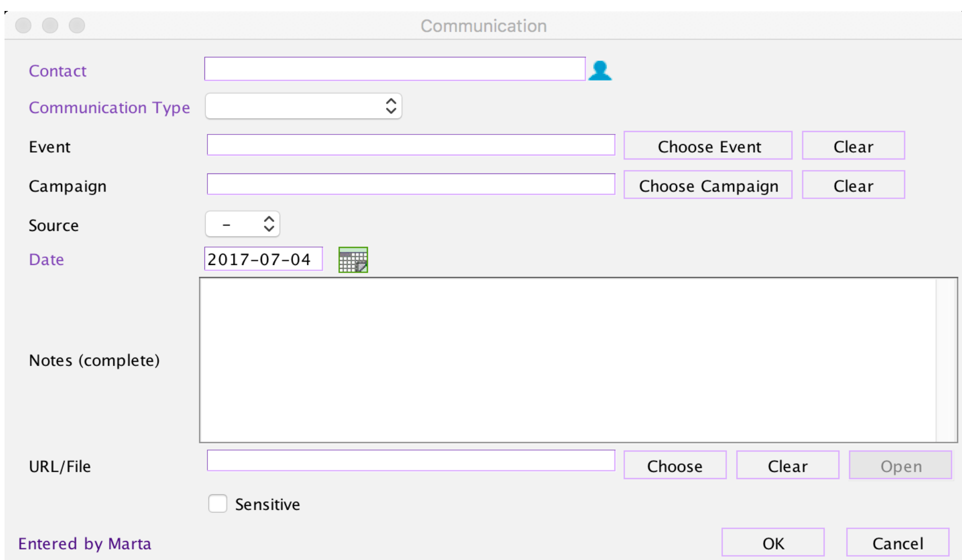
Explore

Click this button to get a window that allows you to specify searches to find communications, and compare the results of several searches. For more detail see *Explore Communications* on page 166.

Enter Communications

Here is how you record a COMMUNICATION:

- ✔ Show the COMMUNICATIONS list.
- ✔ Click the New button. This dialog appears:



- ✔ If many of the details of the COMMUNICATION are the same as the last one you entered, then click the Duplicate Last button. This button fills in the fields of the COMMUNICATION record to be the same as the values in the last record you edited.
- ✔ Click to choose the CONTACT for whom you are entering a new COMMUNICATION.
- ✔ Depending on how your Sumac Administrator has set up Sumac, you may be able to relate a single COMMUNICATION with up to three CONTACTS.
- ✔ Choose the COMMUNICATION type.

- ✔ If the COMMUNICATION related to an event or CAMPAIGN, choose the relevant event or CAMPAIGN.
- ✔ If you know the source for the COMMUNICATION then choose it from the Source drop-down menu.
- ✔ Enter the date of the COMMUNICATION.
- ✔ The Notes field is optional, but for some types of COMMUNICATIONS, it is often an important part of the record. Be sure to describe the nature of the COMMUNICATION that occurred. This field can hold up to 8192 characters or about two pages of text.
- ✔ If there is a file associated with this communication, then you can click to choose the file, linking it to the communication. For this to work well in a multi-user setting, the file should reside on a shared local or cloud-based file server.
- ✔ If this COMMUNICATION is sensitive, i.e. it should be seen by only a few people in your organization who have the ability to specify and see what is sensitive, then click the Sensitive check box.

  Hint: The Sensitive check box does not appear if you do not have the ability to see sensitive information.

- ✔ Click OK to save the COMMUNICATION into the database.

Record Inbound Communication

To create a complete record of COMMUNICATIONS with your CONTACTS, Sumac allows you to record CONTACT inquiries and comments. The process for entering COMMUNICATIONS is described on page 164. In many cases, you may also want to record a REMINDER for following up on any action items that come out of your conversation with the CONTACT. The process for entering REMINDERS is described on page 323.

When recording an inbound COMMUNICATION, you may want to record a Note in the COMMUNICATION to describe the nature of the conversation with the CONTACT.

To make the recorded COMMUNICATION record more useful, you can expand your list of COMMUNICATION types to include inbound COMMUNICATIONS (e.g. inbound phone call, inbound letter, inbound email) and choose the appropriate COMMUNICATION type for each such COMMUNICATION.

Record Outbound Communication

When you use Sumac to send emails, print labels or envelopes for mailing to CONTACTS, or do a Mail Merge, you have the option to create COMMUNICATION records. For further information, see *Labels, Envelopes, and Name Tags* on page 469, *Mail Merge* on page 479, and *Email* on page 400.

Record Attendance at an Event

If a CONTACT attends a performance or social event sponsored by your organization, that attendance is a type of COMMUNICATION. If you are able to get lists of CONTACTS who attended your events, then you can import their attendance into Sumac, to maintain a complete record of COMMUNICATIONS with your CONTACTS.

Before Recording Attendance at an Event

Make sure that the Sumac Administrator has created an entry for the event, and also that the Sumac Administrator has created a COMMUNICATION type that relates to attendance at an event.

You may have information about how a CONTACT heard about the event. Sumac refers to this as source information. If source information is going to be entered, make sure that the lookup list of sources contains appropriate entries for the COMMUNICATION records you are creating. An administrative user can add a new lookup list entry directly from this drop down menu by choosing *New* at the bottom of the list.

Recording Attendance For One Contact

If you are manually entering information for one CONTACT at a time, then follow the steps for entering a new COMMUNICATION (see *Enter Communications* on page 164). When you are entering it, be sure to:

- ✔ Specify that the COMMUNICATION type is attendance at an event.
- ✔ Choose the correct event from the lookup list of events.
- ✔ If available, choose the correct source for the event attendance.

Recording Attendance For Many Contacts

If you have an electronic list (spreadsheet, text file, etc.) of the CONTACTS who attended a particular event, you can import the whole file instead of manually entering each COMMUNICATION record. *Importing* on page 444 discusses bulk import of information and explains how to do this.

Deal With Returned Mail

If mail is returned because of an incorrect address, you should edit the CONTACT'S record, making the following changes:

- ✔ Click the Moved check box in the CONTACT record.
- ✔ Remove all types of communication preferences that would be sent to the address that is known to be incorrect – paper COMMUNICATIONS if the paper mail address is wrong, electronic COMMUNICATIONS if the email address is wrong.

For further information, see *Deceased, Moved, or Wants No Further Communication* on page 119.

Sensitive Data

Sumac can store sensitive information which should be visible to some users but not to others. The Sumac Administrator specifies in each user's profile whether a user is allowed to see sensitive information or not.

If the information about a particular COMMUNICATION is sensitive, then check the Sensitive check box in the COMMUNICATION record. This prevents information in the COMMUNICATION from being seen by anyone who does not have the Sensitive capability.

Explore Communications

Introduction

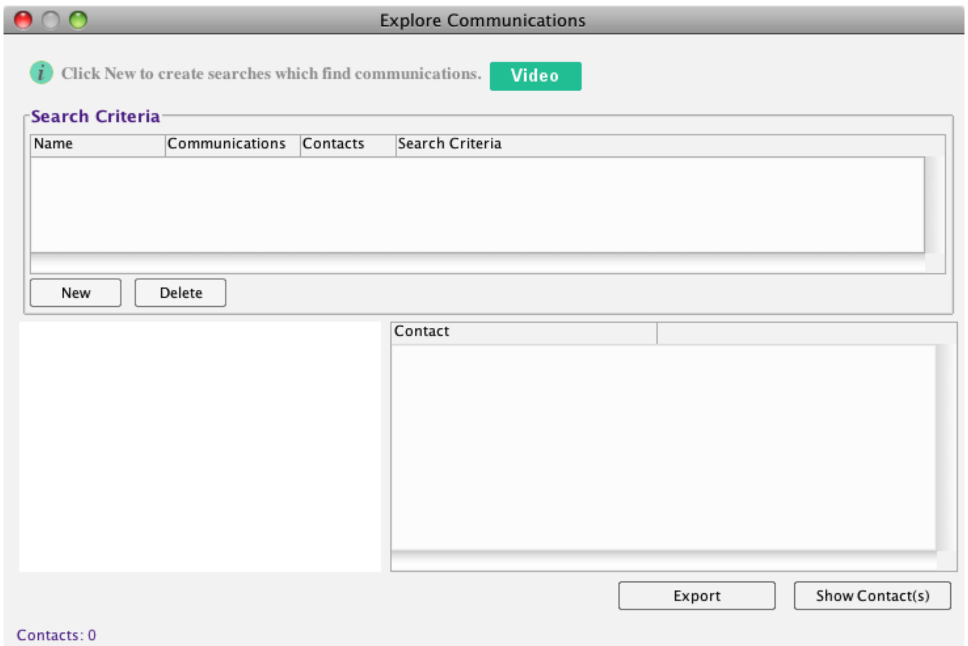
The Explore Communications window lets you specify searches for communications that match various criteria. You can then compare them to see which contacts are in which group of communications. Here are some examples of how this might provide useful insights:

- Who was invited, who replied, who actually attended an event. Note that this depends on having communication types that indicate an invitation, a reply, and attendance.
- Who came to one of three events, who came to two of them, who came to all three.

It produces a Venn diagram (overlapping circles with counts in intersections) showing up to three sets of communications and how they relate to each other.

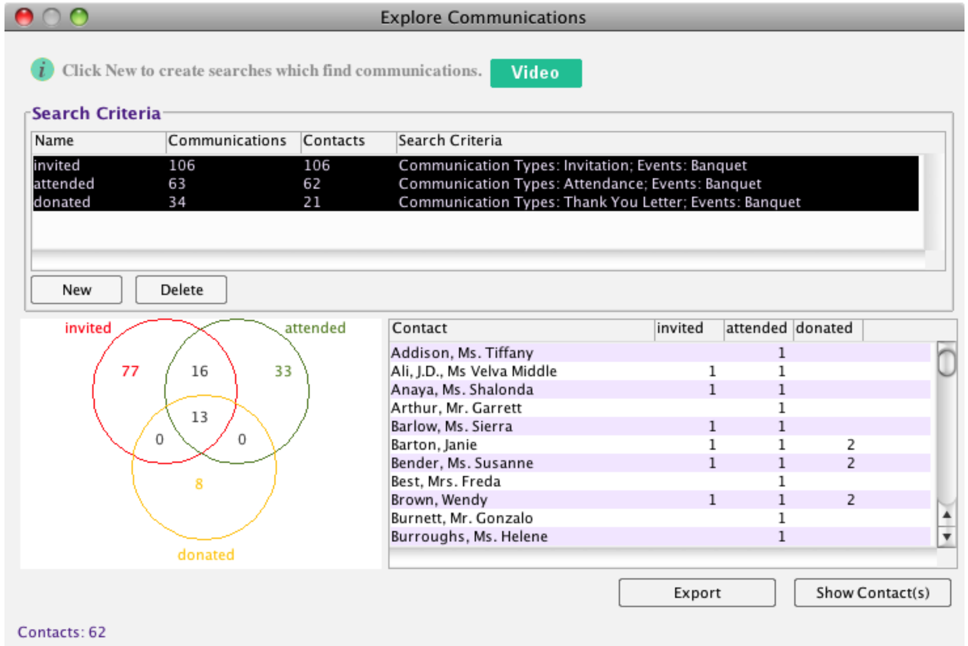
Starting to Explore Communications

Click the Explore button in the COMMUNICATIONS list. When you first open the Explore Communications window, it looks like this:



In the top scrolling list are the searches that you have specified. Click the New and Delete buttons to add and remove searches.

The bottom left area of the window shows a Venn diagram of up to three searches that are selected in the list of searches. Click to select one ore more searches and the diagram appears:



If you then click in the Venn diagram, Sumac shows CONTACTS in the bottom right scrolling list:

- ✔ Click a Search name to see all the CONTACTS found by that search.
- ✔ Click a number to see just that subset of CONTACTS.
- ✔ The list of contacts is sorted by name, and shows how many COMMUNICATIONS were received by each CONTACT that match each of the three different searches. Click Show Contact(s) to open the CONTACTS list showing the four currently displayed CONTACTS. Double click a CONTACT to see all communications with that CONTACT.

Course Registration

Introduction

The course registration feature keeps track of courses, sessions, registrations, attendance, and marks.

Terminology

A *course* is a particular curriculum of learning. The course may be delivered many times: perhaps the same course is offered once each quarter.

A *session* is the delivery of a course at a particular time. For example, a session of a course may deliver the course over a period of three months starting in September.

A *class* is a unit of teaching, perhaps a two-hour lecture, that is part of a particular session.

So, there may be several sessions of any particular course, and a session consists of several classes.

Notes for the Sumac Administrator

General

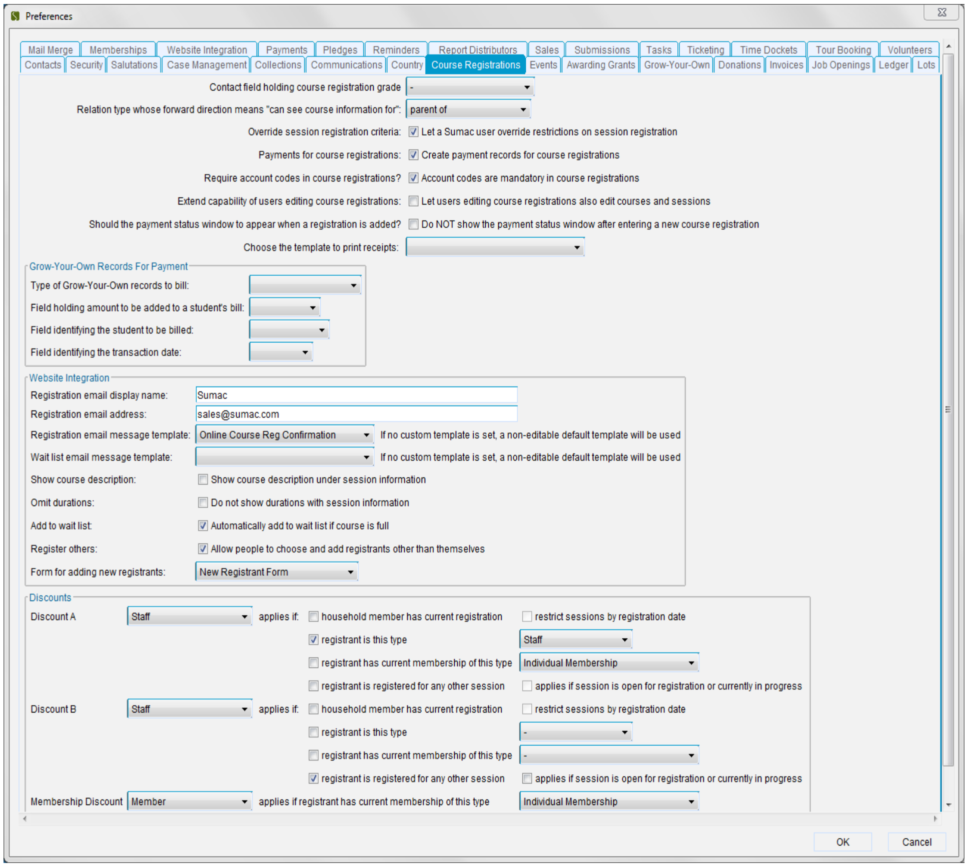
Courses and sessions must be defined by the Sumac administrator using the Utilities/Customize Database/Lookup Lists command in the Sumac console.

Field Preferences

Use the Utilities/Customize Database/Field Preferences/Course Registration command in the Sumac console to:

- re-label fields
- completely remove fields from the user interface
- make fields mandatory, or
- determine which fields should appear on a website.

Preferences



Grades

The Course Registration module can enforce grade requirements when a student registers for a session. In order to do this, you must tell Sumac which field (an Extra Field) in the contact records holds the grade.

View Other Contacts

You can allow one contact to see (on your website) the course registrations for other related contacts. This is particularly useful for allowing parents to see the course registration information for their children.

Use the drop-down menu labeled *Relation type whose forward direction means can see course information for* to choose the relationship that will let one person see the course information of another person. You may want to create a special relationship, just for this purpose; alternatively you might find it convenient to just use an existing relationship like *parent of*.

If this relationship has been defined in the Preferences, then when a new registration is created, if the payer and registrant are not related, Sumac asks if you want to relate them and can create the relationship for you.

Override Limits

A session can specify a maximum number of students that can be registered. I you want internal users to be able to override this maximum, click the checkbox labelled *Let a Sumac user override restrictions on session registration*.

Allow Editing of Lookup Lists

If users who edit registrations should also be able to edit courses and sessions, click the checkbox that extends this capability to them. Commands for editing these two lookup lists appear in the Registrations list dialog.

Payment Status

Sumac automatically shows the payment status window when you add a new course registration. If you *do not* want the payment status window to appear after entering a new course registration, set this checkbox.

Template for Receipts

Use this drop down list to tell Sumac which template you would like to use for Course Registration payment receipts. For templates to appear in this list, you must load them first in Utilities/Customize Database/Area: Course Registrations/ Lookup List: Document Templates. Sumac uses this template when you click Print Receipt in the Registration View List window.

Grow-Your-Own Integration

If you have created a Grow-Your-Own (GYO) module which entails billable amounts entered in conjunction with course registration information (e.g. a GYO module to book meals while a course is in progress), then Sumac can integrate this GYO information with billing for courses. Specify the type of GYO records, and the fields within these GYO records for the amount to be billed, the contact (typically the student) to be billed, and the GYO field that identifies the date of the transaction.

Grade Field

If a student is in a particular grade, then courses that specify a different grade are not shown to that student. The grade is stored in an extra field in the CONTACT record. Choose which field holds the grade.

Website Integration

When a student registers on the website, Sumac checks if the student has an eligible grade before they are allowed to pay. Sumac also determines a student's eligibility for a discount based on:

- Registrations already saved in the database
- Other registrations in the shopping cart

Upon successful registration, Sumac sends an email to the student *from* the email address entered in this preference window. The email sent to the student acknowledges the registration.

At the same time, is automatically sent *to* the email entered in this preference window. This email is to tell an internal Sumac user that the registration took place.

A user registering for a course can add other registrants (e.g. children or other family members) to the database and register these other related registrants for coursed. To enable this feature you must:

- Define the relationship that allows one contact to see or create registrations for another contact. See *View Other Contacts* on page 170.
- Create a form (using Utilities/Customize Database/Lookup Lists) that a website user will use to add another contact to the database. Typically, this

form defines a few basic fields like name and some contact details, and some additional fields like alergies and an emergency phone number.

Hint: Note that when you create this form, you must tell Sumac how to move information from the form into a contact record. Each field in a form has a *Variable Name in another record type* field which lets you specify the name of a field in a contact record (e.g. c_Last_Name). These names are the ones used in mail merge operations; get them from the Utilities/Template/Mail Merge Codes command.

- Choose the *Form for adding new registrants* in the Preferences.

Discounts

You can define discounts that are available to people registering for courses. Define the discount eligibility criteria in this Preferences dialog. If you have set up a discount based on the registrations of other household members, then Sumac determines these relationships in two ways:

- Household relationships; you can restrict the discount to only current sessions, rather than allowing a discount for sessions taken in the past
- Relations based on relationship type defined specifically to connect people in the course registrations module

You can also determine discount eligibility based on:

- Registrant type
- Membership type
- Other registrations
- Dates of other sessions currently open for registration

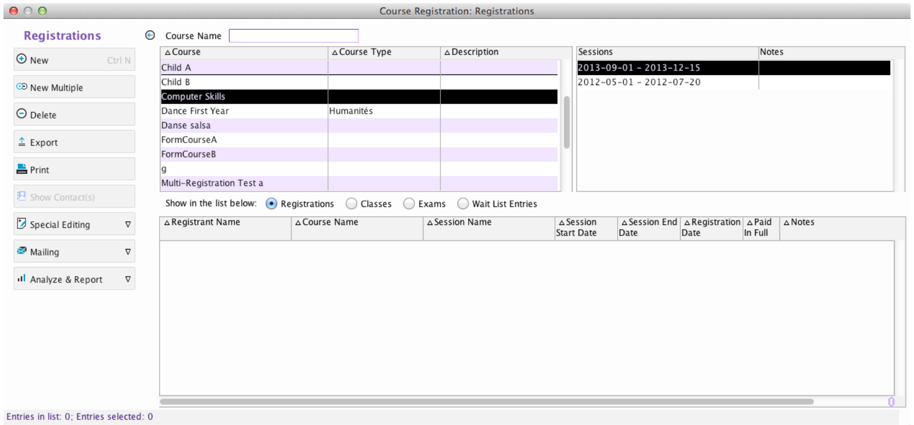
To specify which of these discounts apply to each session, see *Sessions* on page 645.

Three List Windows

The course registrations module provides two ways to view course registration data.

- The Course View presents day-to-day information about students and classes in current or upcoming sessions. It provides rapid access to information with just a few clicks.
- The Registrations view is more like all the other list windows in Sumac, and shows a list of registrations.
- The Transaction Log list automatically tracks these types of transactions:
  - move a student from one session to another
  - add a student to the wait list
  - register a wait list student in the course he/she was waiting for

Course View List Window



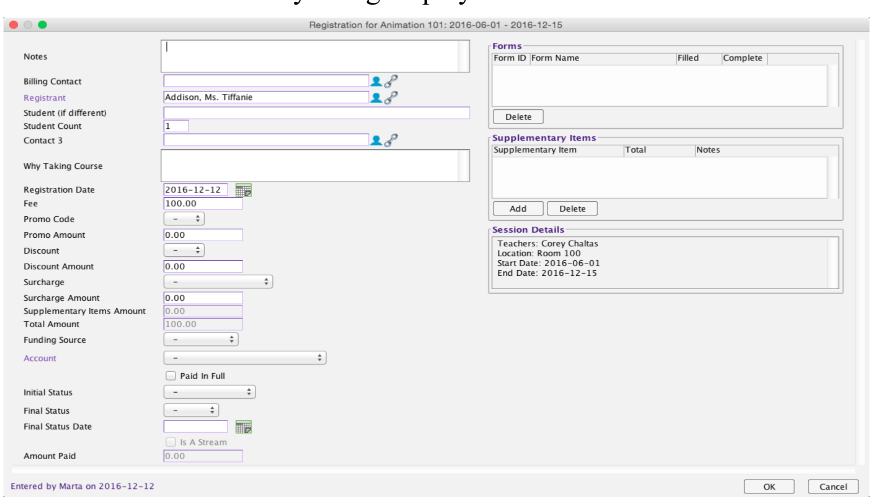
At the top of the registrations list there are three tools for selecting which information shows in the list:

Courses List	Click to select the course whose registration information you want to see.
Sessions List	After clicking a course in the courses list, this list shows all the sessions for the selected course. Click a session to see its information in the main scrolling list.
Information Radio Buttons	These four radio buttons – Registrations, Classes, Exams, and Wait List Entries – enable you to specify which information should show in the main scrolling list. These different views of session-related information are described below.

Registrations Radio Button

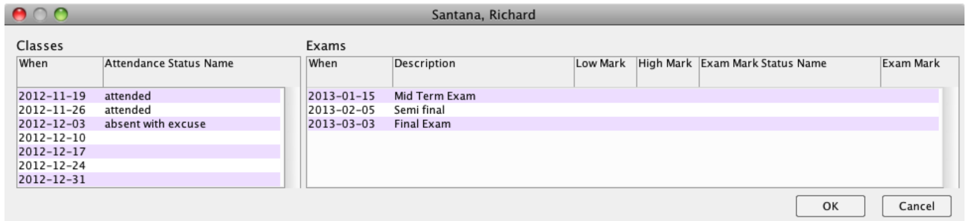
Each record in the list is a registration record. Click New to create a new registration record for a student in the selected session.

Click New Multiple to add the students who are registered in another session to the session that is currently being displayed.



Hint: The Student Count field indicates how many students will be attending based on this registration. Use this field in situations where a registration may be for a family, a couple, or any situation where one course registration can include several people.

Click a single student and click Student Summary to produce a quick summary window showing attendance and exam marks for the chosen student.



Click to select one or more students and click Attendance Report to produce a report showing the chosen students' attendance in the selected session.

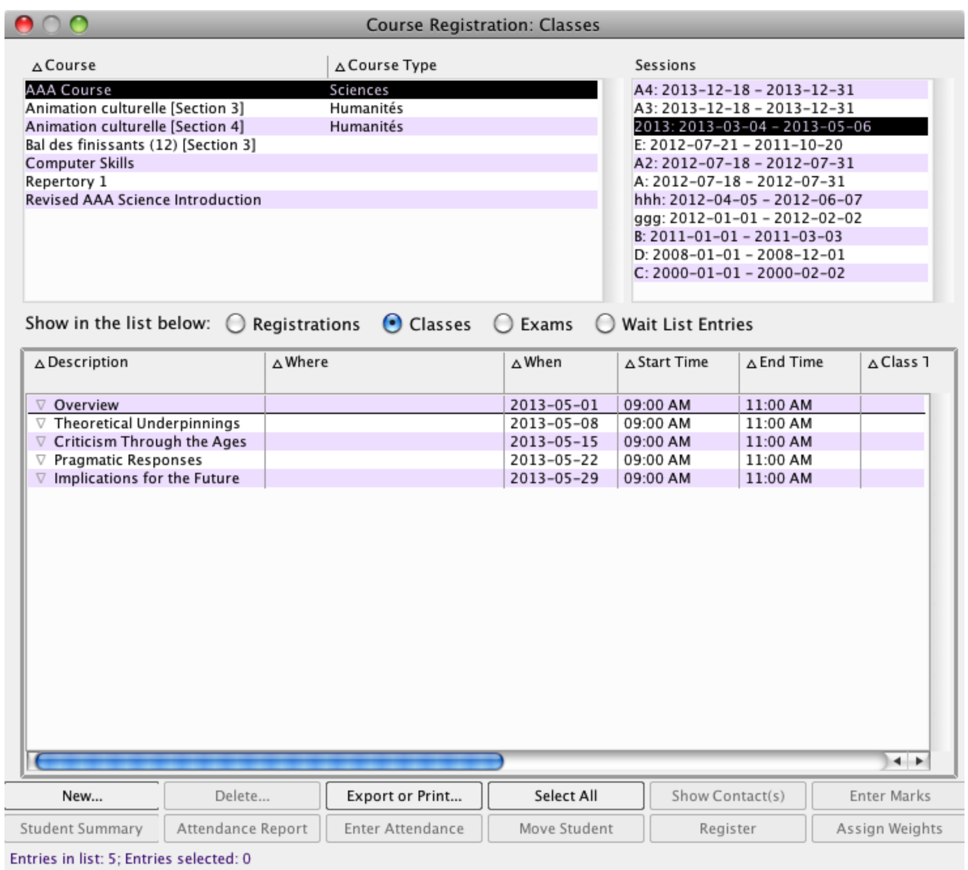
Click a student's expansion icon to show recent COMMUNICATIONS with that student.

Click to select a single student, then click the Move Student button to move the student to a different course and session.

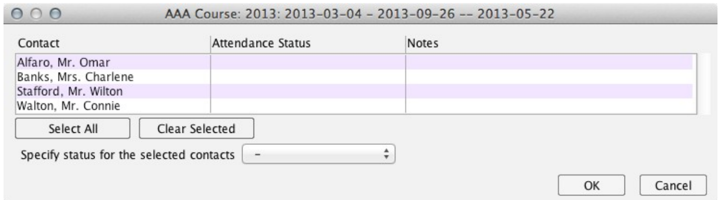
Classes Radio Button

In the classes view, the main scrolling list shows classes.

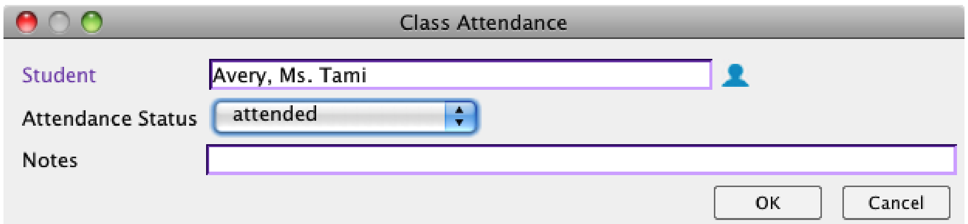
If you click to expand a class, you see attendance records for each student who is registered in the session. You can double click and edit individual attendance records.



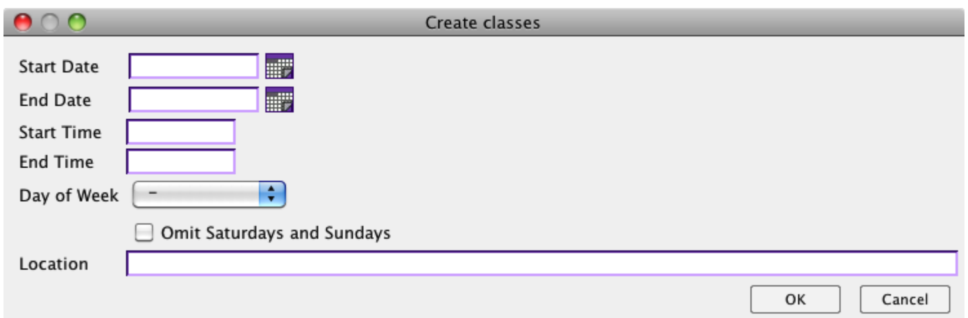
Alternatively, you can click the Enter Attendance button to get the following dialog. Click to select one or more students, then choose their attendance status from the drop-down menu. Click OK when you are finished specifying attendance information.



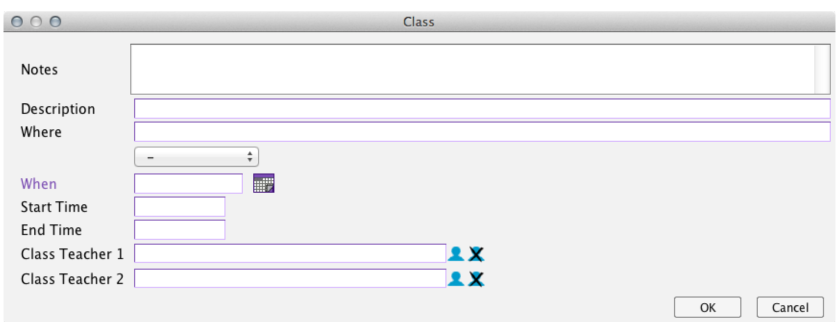
The dialog for entering or editing a single student's attendance looks like this:



If you click the New button, you are asked if you want to create several classes or just one. If you click to create several, then this dialog appears:



The dialog for creating or editing a single class looks like this:

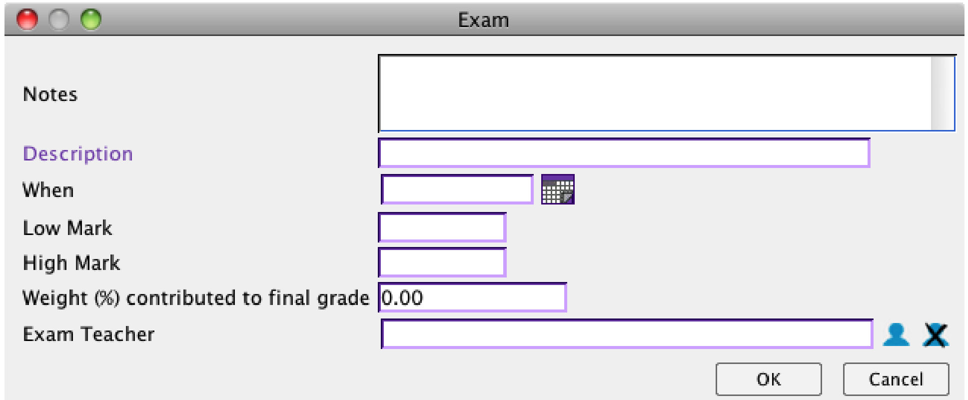


If you have defined standard locations for classes, then the drop-down menu below the *Where* field contains a list of them. Choose from the drop-down menu to fill in the *Where* field.

Exams Radio Button

Define Exams

Click New to create a new exam:



Enter a brief description of the exam (e.g. Mid-Term). If you are using Sumac's ability to calculate final grades, then you can indicate the weight that this exam should contribute to the final grade.

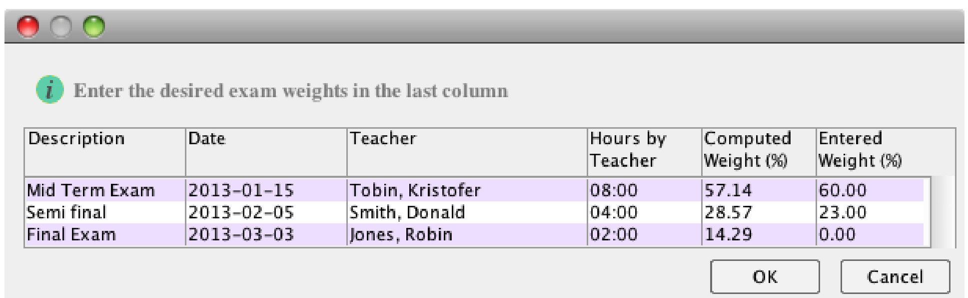
If a particular teacher was responsible for this exam, then choose the teacher.

Assign Weights To Exams

Sumac can produce a marks report that shows a calculated final grade. This is calculated based on exam marks, and the weight assigned to each exam.

If you know the weights that you wanted assigned to each exam, then you can define them in the definition of the exam (see above). In addition, Sumac can help you calculate these weights based on the hours of class time taught by each teacher who is responsible for an exam.

Click the Assign Weights button to get this window:

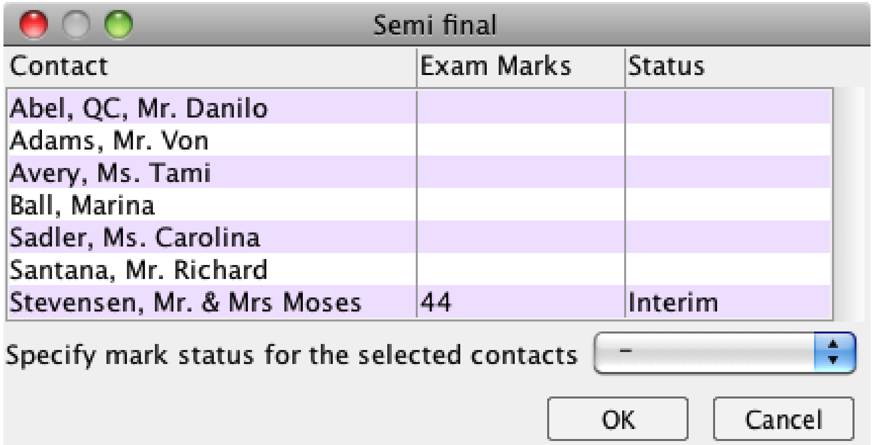


It shows each exam, the responsible teacher (which is the teacher for the session if no teacher is specified for the exam), the hours taught by that teacher, and, based on the hours, the computed weight that is suggested for the exam. You can then manually change the weights based on the information provided.

Record Marks

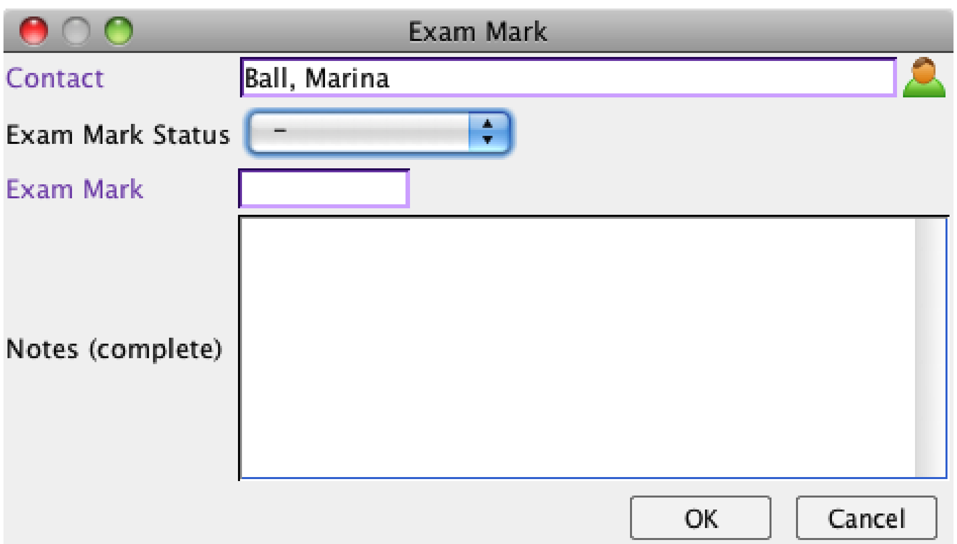
In this view, the main scrolling list shows exams. You can expand an exam to see the marks for each registered student; each mark record can be edited by double clicking it.

Alternatively, you can select an exam then click the Enter Marks button to get the following dialog:



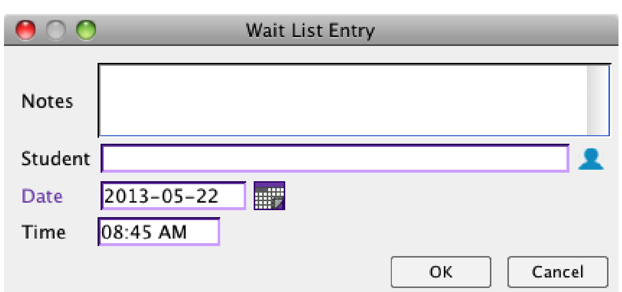
Click to select one or more students, then choose a mark status from the drop-down menu. Click on individual students, in the Exam Marks column, to specify a mark for each student.

Here is what a mark looks like: the student (contact), the status of the mark, and the mark itself. If a teacher provided comments about the student's performance, they can be recorded here.



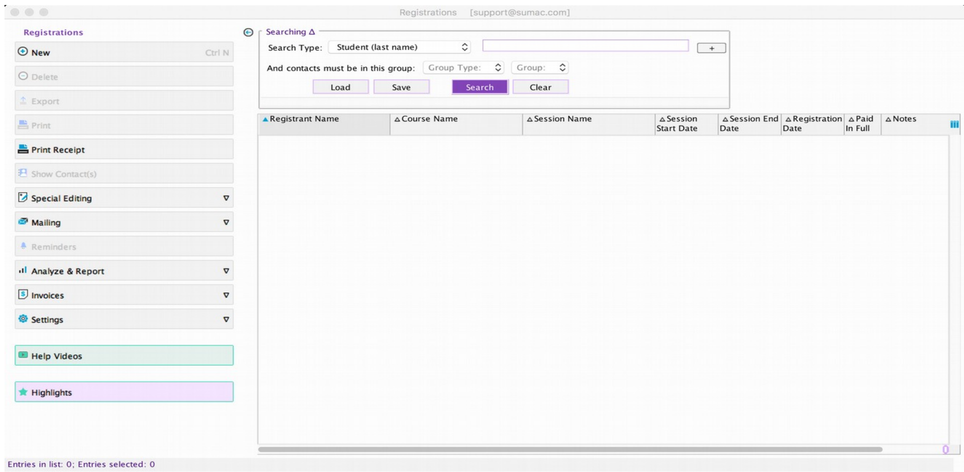
Wait List Entries Radio Button

You can record the time and date when a person is added to a waiting list for a course:



If you want to register a person who is on the waiting list, click to select the entry in the waiting list, then click the Register button. When you click OK to save the registration, Sumac deletes the wait list entry.

Registration View List Window



This window provides a standard Sumac list window, with several ways to search and find the desired registrations.

Buttons

Analyze & Report

Choose a report to be displayed:

Title	*Contents*
Attendance	For each session in a specified date range, show the attendance and age of each student in each class.
Attendance by Session	Show attendance for any student who attended a class in a specified date range.
Attendance by Student	For each student in a specified date range, show the sessions the student was registered for and the student's attendance record at each session.
Class Hours by Session	Show the hours taught by each teacher for sessions with classes in a date range.
Class Hours by Teacher	Show hours taught by each teacher, broken down by session.
Class List	Show students in each session that have class in a date range.
Class List with Financials	Show students in each session that have class in a date range. Include information about the student's payment status.

Title	*Contents*
Current Students	Show students registered for sessions in a date range.
Enrollment by Course Type	Break down registrations by course type.
Exam Results	Show the results of exams for sessions for which registrations are showing in the list window; calculate a weighted final mark.
Incomplete Forms	A list of students who need to fill in forms prior to starting a session.
Payment Status	Show charges and payments from students.
Registration Counts	Show the status of registrations for all current and upcoming sessions.

Special Editing

Compute Enrollment Button

Determine how many students are enrolled in all the sessions being displayed. The enrollment can be displayed as a column in the scrolling list.

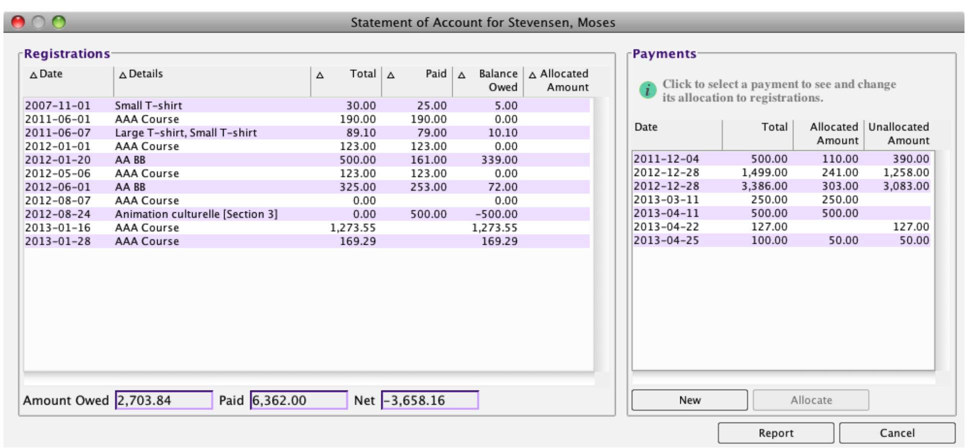
Move Student Button

Click to select a registration. Click the Move Student button to put that student into another session.

Payment Status Button

Click this button to see payment information for a particular student. If no registration record is selected, then Sumac asks you which student you are interested in.

Sumac then shows you all of the selected student's registrations and payments.



Billable Items on Left Side

Billable items are on the left side. This includes:

- the student's registrations
- related charges entered using a Grow-Your-Own module
- charges entered using the Sales module.

Note that there is a summary of amounts owed at the bottom.

Payments on Right Side

On the right side is a list of payments made for course registrations. You can click the New button to create a new payment.

> Hint: If you create a new payment record, the contact making the payment is the contact whose statement is showing, but you are allowed to change that. If you change the payer contact, then the payment will *not* show up in the Payment Status window unless you assign at least part of the payment to one of the charges on the left-hand side.

Each payment can be allocated to specific registrations. If you click a payment (see picture above), then its current allocation appears in the Allocated Amount column on the left side. Note that values in that column can be edited by clicking them.

> Hint: If a payment is a refund, it will be a negative amount. You can allocate negative amounts (refunds) to registrations.

Email Payment Status Report

The Registrations list window has a Mailing/Email Payment Status command. It lets you generate and email a payment status report to several students at once.

Allocate Button

If a payment record is selected, then you can allocate the un-allocated portion of that payment to charges in the left-hand scrolling list. Sumac gives the option to allocate to the oldest charges first, or to allocate just to the specific charges selected in the left-hand list.

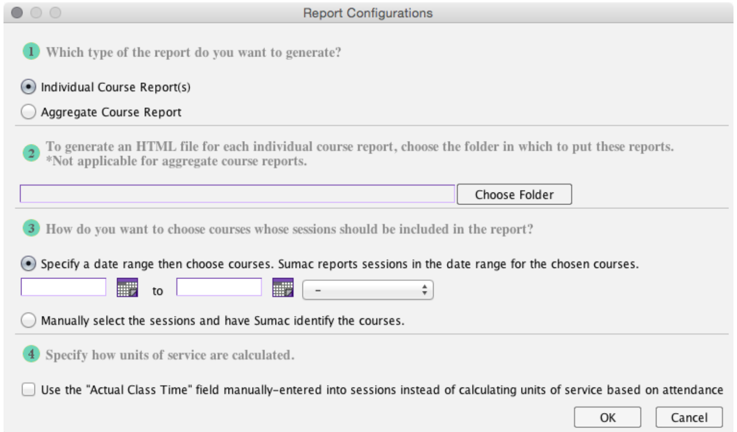
Reminder Button

Click to select a single registration record. Then click the Reminders button. If there is a reminder associated with the selected registration, then Sumac shows you that reminder. If there is no reminder for that registration, then Sumac prompts you to create one.

Attendance Student Statistics Report

Use this report to show the total attended class time (units of service) of the sessions within a course or several selected courses. It also summarizes the registrants of these sessions by various contact fields.

When you choose this report, the following dialog appears:



Individual or Aggregate Course Report

If you choose Individual, you get one report for each chosen course. Otherwise, if you choose aggregate, statistics for all chosen courses are added together to create one report. If you are creating individual reports, you have the option of saving each individual report into a separate file.

Choosing Courses and Sessions to Appear in the Report

There are two ways to specify the courses and sessions for the report. If you either enter a range of dates, and Sumac selects sessions that are in that date range. Alternatively, you can manually select the sessions that should appear in the report.

Units of Service

Sumac calculates units of service from attendance records and the duration of each session. If, however, you want to report using units manually entered into each session record, click the checkbox to *Use the "Actual Class Time" field*.

Disbursements

Introduction

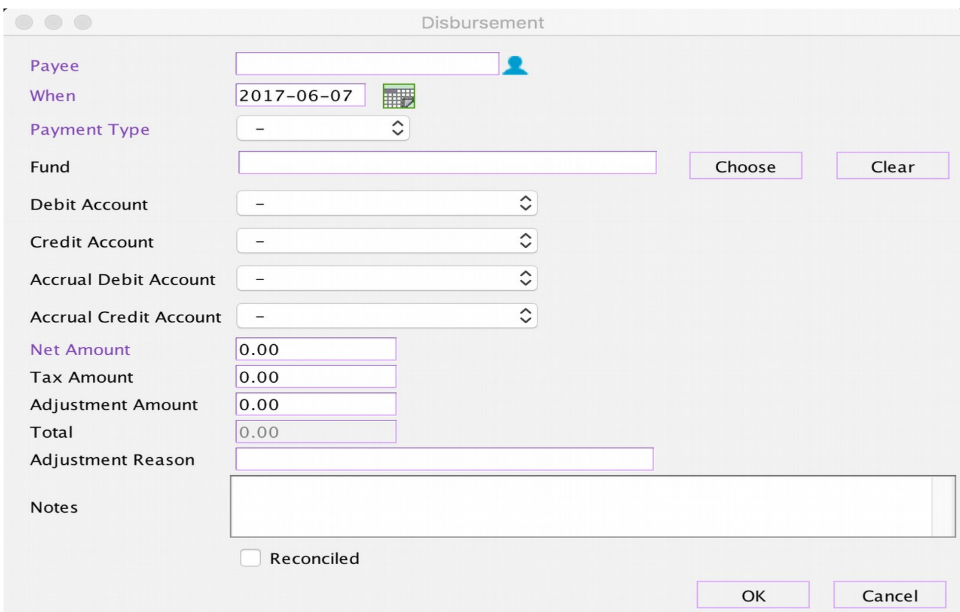
Disbursements appear in their own list in the Financial grouping in the console window. They can also be accessed and created through the Contact and Grant Applications Lists.

Notes for the Sumac Administrator

Sumac can create ledger entries from Disbursements so that they can be exported directly to your accounting system. If you intend to do this, you may find it convenient to define default accounts for your Disbursements. Before using Disbursements, set up default accounts and, if you use accrual accounting to ledgerize Disbursements, default accrual accounts for Sumac to use. This can be done by an administrative user in Utilities/Preferences/Ledger, see page 248. Note that even if you have defined default accounts, you can always override them in any particular Disbursement.

Enter Disbursements

A new disbursement can be entered from the Contact list, Grant Applications list, or the Disbursement list. When you click New, the following window appears:



Donations

Introduction

An important function of Sumac is to keep track of information about DONATIONS. DONATIONS relate to other types of information in Sumac:

Entity	*Relation To Donations*
CAMPAIGN	Each DONATION can refer to a specific CAMPAIGN, to indicate that the DONATION was a consequence of the CAMPAIGN. Analysis of DONATION history is an excellent way to focus your CAMPAIGNS, and maximize new giving.
CONTACTS	Each DONATION must refer to at least one CONTACT – the donor who made the DONATION and will receive a receipt. In addition, a DONATION may refer to up to three other CONTACTS: ◆ In Honour Of: a DONATION may be in honour or in memory of someone. ◆ Send Recognition: a DONATION may be made by one CONTACT but the donor CONTACT wants recognition for the gift to be sent to someone else. ◆ Soft Credit: soft credit for a DONATION may be given to someone in addition to the actual donor. A DONATION may also be related to a list of contacts who are called influencers. These are people who had some influence of the process that led to the DONATION.
Event	Each DONATION can refer to a specific event, to indicate that the DONATION was made in conjunction with or response to the event.
MEMBERSHIP	A DONATION can be entered as part of a MEMBERSHIP renewal.
PAYMENT	Sumac can automatically generate a PAYMENT for each DONATION, enabling you to instantly receive the proceeds of credit card payments.
PLEDGE	PLEDGES can automatically generate DONATIONS. Each DONATION can refer to a specific PLEDGE, indicating that the DONATION was made to (partially) fulfill the PLEDGE.
Receipts	You can use Sumac to generate charitable tax receipts and thank you letters when you receive a DONATION. You generate these documents by means of document templates. To learn how to create document templates, see the *Create Document Templates* on page 499.
REMINDERS	When certain types of DONATIONS are received, your organization may want to schedule specific follow-up actions. Sumac supports REMINDERS for doing this. In order to schedule REMINDERS in a uniform way, you can create action plans – a list of actions to be performed to deal with special situations.
SALES	A DONATION can be entered as part of a SALE of merchandise or services.
TICKET ORDER	A DONATION can be entered as part of a TICKET ORDER.

Notes for the Sumac Administrator

Field Preferences

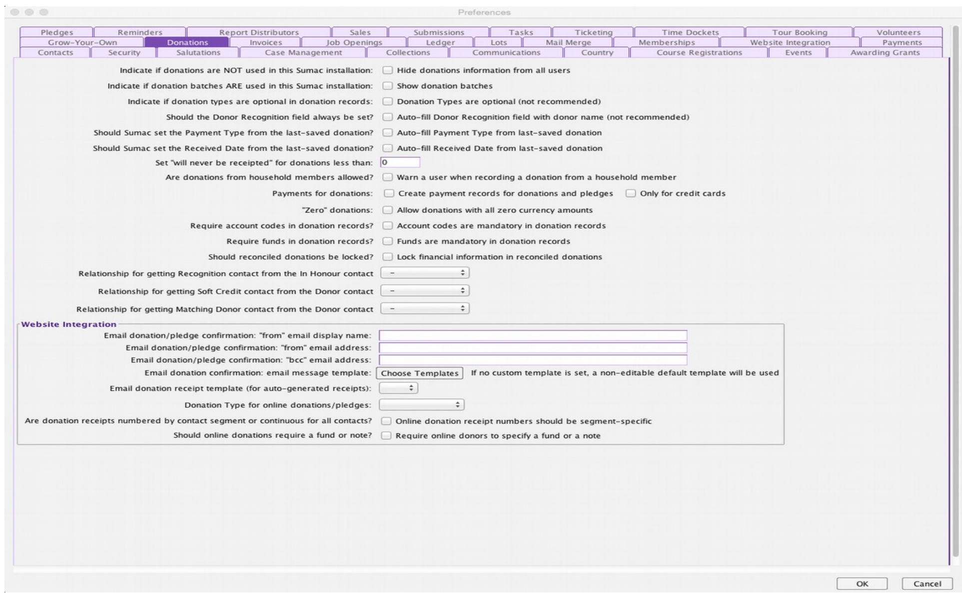
Use the Utilities/Customize Database/Field Preferences command in the Sumac console to:

- re-label fields
- completely remove fields from the user interface
- make fields mandatory, or
- determine which fields should appear on a website.

in Donation records.

Preferences

Use the Utilities/Customize Database/Preferences command in the Sumac console to get the Preferences dialog. Click the Donations tab.



If your installation of Sumac does not use DONATIONS, then you can click the check box to remove DONATION information from some parts of the user interface :

- The Donations button in the Sumac Console window disappears.
- DONATION information in the Basic tab of the contact dialog also disappears.

If you want to group donations into batches, which usually correspond to bank deposits, then click the *Show donation batches* checkbox.

If, when entering donations, you do not want to require Donation Types, you may check the *Donation Types are optional* checkbox.

> Hint: We do not recommend making donation types optional, and it should only be used in very special circumstances.

You can allow zero donations – ones with both the total and receiptable amounts set to zero. In some jurisdictions, a zero donation is the appropriate way to record a gift-in-kind.

You can specify that account codes or funds are mandatory. Note that if you require account codes, you can choose this field to make them mandatory, but you can also reduce the burden of data entry by having account codes selected automatically when a user chooses a donation type. See *Donation Types* on page 612.

You can indicate that Sumac should always fill the Donor Recognition field in a donation, using information from the donor's contact record: either the donor recognition information or the contact's name. This is not recommended because it limits flexibility in later reporting.

You can also tell Sumac to automatically fill the payment type and received date from the last-saved donation. This can save time if you frequently enter many similar donations at the same time.

You can specify a donation amount and if the donations is below this amount, Sumac to automatically clicks *will never be receipted* in the donation record.

There is a preference which causes Sumac to warn uses when they are entering a donation from a household member. This helps enforce a policy (if you have such a policy) that donations should normally be recorded against the household instead of against individual household members.

You can tell Sumac to create ledger entries for donations. The ledger feature of Sumac can track all financial transaction data that occurs.

You can tell Sumac that if a donation has been marked as reconciled, it should lock financially-significant information to prevent it from being changed.

You can specify a relation between an in-honour or in-memory contact and a recognition contact. Then, when a user enters a donation, Sumac automatically uses this relation to look for an appropriate recognition contact, based on the in-honour or in-memory contact.

Similarly, if donations from a particular donor should always be soft credited to a particular contact, you can specify the relationship between the donor and the soft credit contact. Then, when a user enters a donation, Sumac automatically uses this relation to look for an appropriate soft credit contact, based on the donor.

Again similarly, you can define a relationship between a donor and another donor who will match the first donor's gifts. Sumac can automatically fill in the matching gift donor, based on the donor.

Finally, you can configure how donations and pledges are handled on your website.

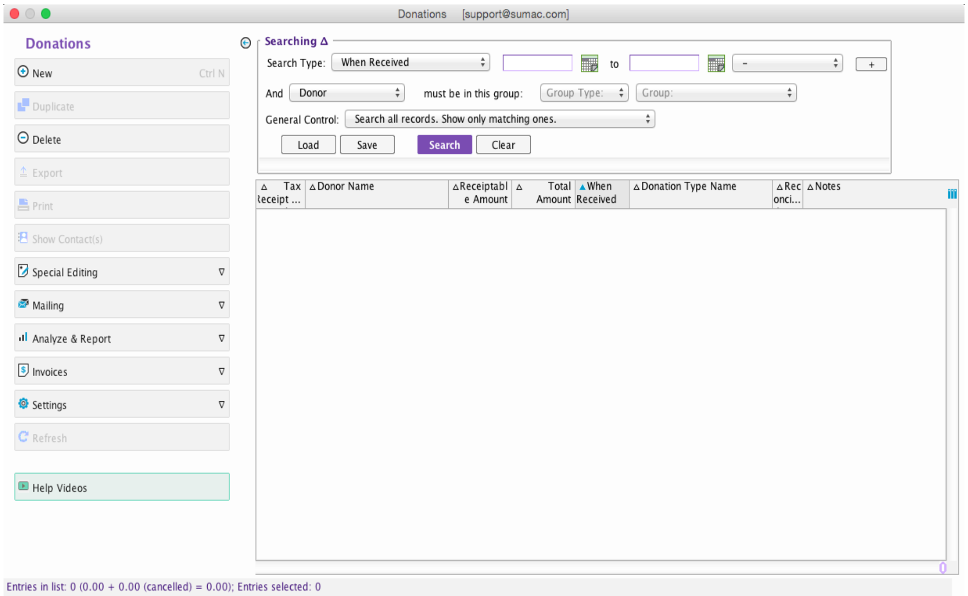
Online Donations

Sumac can accept donations directly from your website. When a donor makes a donation from your site, the donation record and corresponding payment record are both created automatically. For information about setting up online donations, see *Appendix B – Online Transactions* on page 529.

When your website sends a response email for a donation received online, the templates used for the email can be segment-specific. The templates are chosen using the Preferences command.

> Hint: Note that donation receipts automatically sent for donations received through your website must be created with a PDF template. The PDF receipt will be encrypted so that it cannot be changed by the recipient. The email that is sent to the donor can be bcc'd to another email address, so if you want a record of all the documents emailed to donors, use this option.

The Donations List



Hint: Cancelled receipts are displayed grey, instead of black, in the DONATIONS list.

The tax receipt number column in the DONATIONS list shows the receipt number if one has been assigned. Here are other things that may appear in the receipt number column:

[number]	the receipt number for the DONATION
N/A	no receipt number is going to be assigned to this DONATION
Pledge	the DONATION was generated by a PLEDGE
Annual	the DONATION is for a CONTACT who wants only one receipt per year
Annual-Pledge	the DONATION is for a CONTACT who wants only one receipt per year, and the DONATION was generated by a PLEDGE
[nothing]	none of the above-mentioned conditions exists

Searching

Finding Donations From Other Lists

When you are looking at the CONTACTS list, you can click the expansion icon for a CONTACT to see DONATIONS received from that CONTACT.

When you are looking at the MEMBERSHIPS list, you can click the expansion icon for a MEMBERSHIP to see DONATIONS received in the last six months from the CONTACT identified by the MEMBERSHIP record.

When you are looking at the PLEDGES list, you can choose a PLEDGE, then click the Show Donations button to see the DONATIONS associated with a particular PLEDGE.

Searching Within the Donations List

In addition to the search criteria in the following table:

- You can specify a particular contact from the donation records must be in a group. Groups are created by Search Builder (in the contacts list window) and saved into the database for later usage.
- Use the General Control to specify what Sumac should do with the donations it finds. This enables more powerful multi-step searches. For more information about general controls, see page 87.

Search Criteria	*What Is Found*
Account	Choose the bookkeeping account of the DONATIONS you seek.
Acknowledged Status	Find DONATIONS that have or have not been acknowledged.
Amount	Find DONATIONS whose total or receiptable amount is above or below specific amounts.
Campaign and its children	Choose the CAMPAIGN whose DONATIONS you seek.
Cancelled Receipt	Find DONATIONS that are cancelled or not cancelled.
Cheque Date	Find DONATIONS paid by a cheque written in a specified date range.
Cheque Number	Find DONATIONS with the specified cheque number.
Contact Segment	Find DONATIONS from donors in a specific segment.
Donation Batch	Find DONATIONS in the specified batch. If you do not specify a batch, this search will find all DONATIONS without a specified batch
Donation Type	Choose the type of the DONATIONS you seek.
Donor Country	Find DONATIONS from CONTACTS in a specified country
Donor First Name	Find DONATIONS from CONTACTS whose first name starts with the entered text.
Donor Last Name	Find DONATIONS from CONTACTS whose last name starts with the entered text.
Donor Recognition	Find DONATIONS with certain text in their Donor Recognition field.
Entered By	Search to find COMMUNICATIONS entered by a particular user.
Event	Find DONATIONS associated with a particular event.
Event Group	Find DONATIONS associated with an event in the specified group.
External Receipt Number	Find donations with the specified externally assigned receipt number.
Fund	Choose the fund or purpose of the DONATIONS you seek.

Search Criteria	*What Is Found*
Fund Code	Enter the pattern of characters you are looking for in your structured fund codes. There are two special characters to use in this searching: % matches any number of characters _ matches any single character. For example, to find donations for funds that have 456 in their four, fifth, and sixth positions, search for this (do not include spaces between characters, they are just there to clearly separate the three underline characters and the three digits): `_ _ _ 4 5 6`
Fund Type	Choose the type of fund of interest. Sumac finds all DONATIONS whose fund is of the specified type.
In-Honour Country	Find DONATIONS whose in-honour contact is in a specified country.
In-Honour First Name	Find DONATIONS in honour or in memory of CONTACTS whose first name starts with the entered text.
In-Honour Last Name	Find DONATIONS in honour or in memory of CONTACTS whose last name starts with the entered text.
Influencer Last Name	Find DONATIONS that were influenced by CONTACTS whose last name starts with the entered text.
Linked to	Find DONATIONS that are linked to certain types of records based on the type of records a donation is linked to, e.g. a ticket order or membership
Notes	Search donations based on words in the notes field of the donation.
Payment Type	Find DONATIONS with the specified payment type.
Receipt Number Range	Specify the lowest tax receipt number of interest, the highest tax receipt number of interest, or both.
Receipt Status	Click the options of finding DONATIONS that are receipted, not receipted, or from CONTACTS who do not want a receipt.
Recognition Required	Click this check box to find DONATIONS which specify that recognition for the DONATION should be sent to someone in addition to the primary donor CONTACT.
Recognition Sent Status	Search for donations whose *Recognition has been sent* checkbox is turned off or on.
Reconciled Status	Find DONATIONS that have or have not been reconciled.
Show All	This search shows all donations in the database.
Soft Credit Last Name	Find DONATIONS soft credited to CONTACTS whose last name starts with the entered text.
When Entered	Find DONATIONS that were entered into the Sumac database in the specified date range.
When Received	Find DONATIONS that were received in the specified date range.

If you click the plus sign button to specify more than one search criterion, then you can combine the criteria with And or Or to get the list you want. For example, you can find DONATIONS that do not have a receipt *and* were received after a certain date.

View Donations for A Group of Contacts

You can search to find donations from a group of contacts. For example, if you have used Search Builder to define a group that consists of your board members, you could find donations from board members in a certain date range.

View Donations for Just One Contact

There are several ways to work with the DONATIONS for a single CONTACT:

- In the CONTACTS list, find the CONTACT and click the expansion icon to see the CONTACT'S DONATIONS.
- In the CONTACTS list, double click the CONTACT and click to view the History tab.
- In the CONTACTS list, find the CONTACT and choose the Info-Details report from the Report drop-down menu.
- In the DONATIONS list, search by Contact Last/Company Name to find the DONATIONS for the CONTACT of interest, if necessary select them to isolate them from other DONATIONS in the list, then click the Export or Print button to send them to a file or printer.

Buttons

Show Contact(s)

Click to select a DONATION, then click this button. Sumac displays the CONTACT details for the CONTACT who made the DONATION. If more than one CONTACT is identified by the selected records, then this button brings the CONTACTS list to the front and shows the selected CONTACTS.

Special Editing

Show Pledge

If a DONATION was generated by a PLEDGE then you can select the DONATION, then click the Show Pledge button to see the PLEDGE that created the DONATION. Note that if you are editing a DONATION that was created by a PLEDGE, you can click the link button to see the PLEDGE details.

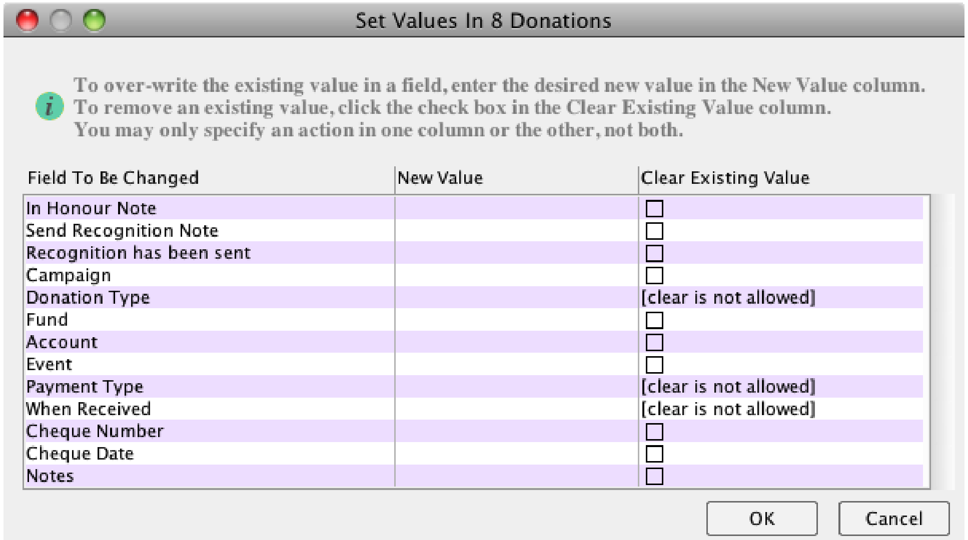
Special Editing

Bulk Edit

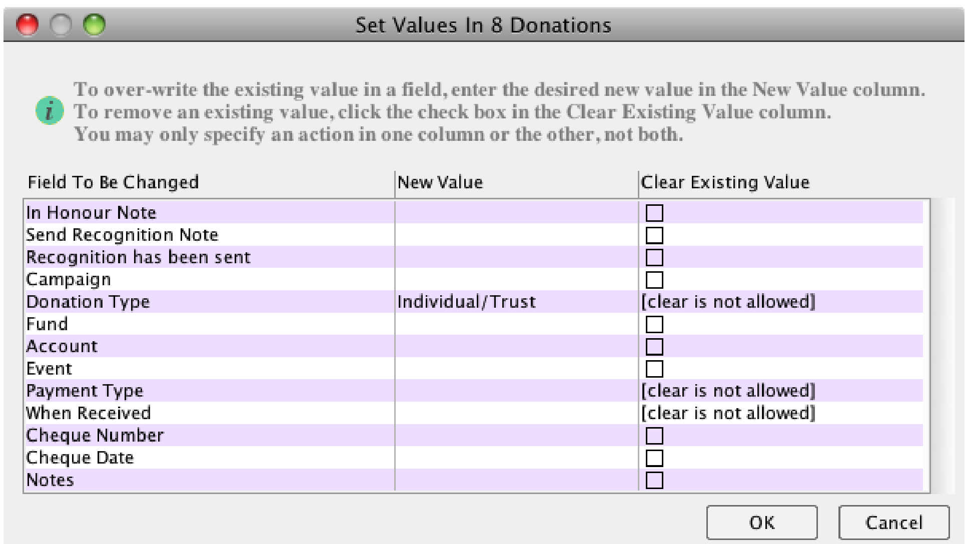
Hint: Only a user with bulk import capability is allowed to use the Bulk Edit button.

This button enables you to set several fields in several DONATIONS all at once. Here is how to use this button:

Search to find the DONATIONS that you want to change. If you only want to change some of the DONATIONS showing in the list, then click to select them. Click the Bulk Edit button. This dialog appears:



Enter the New Value for each field that you want to change. For example, if the donation type for all the chosen DONATIONS should be *Individual/Trust*, enter *Individual/Trust* in the New Value column beside the Donation Type field, like this:



If you want to clear the value of a field in all the chosen DONATIONS, then click the check box in the Clear column beside the appropriate field.

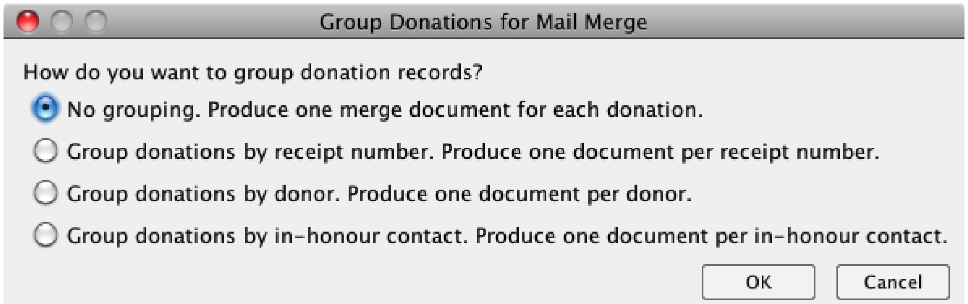
Click OK to cause all the identified DONATIONS to have fields set or cleared as specified.

Mailing

Mail Merge

You can produce one or more new documents – e.g. a personalized letter, invitation, renewal notice, or receipt – by merging data from the database, with a document template file that you have previously created (see *Create Document Templates* on page 499). For details on how to do merge operations, see *Mail Merge* on page 479.

When you click the Mail Merge button in the DONATIONS list, you are given the option of grouping the donations so that several donations can be used to produce a single mail merge output document. Here is the window that will appear:



Your choices are as follows:

- No grouping. This produces one mail merge document per donation record.
- Group donations by receipt number. This produces one mail merge document per receipt number. If several donations have the same receipt number, they are grouped together to create a single output document.
- Group donations by donor. This produces one mail merge document per donor. If several donations are from the same donor, they are grouped together to create a single output document. This is particularly useful for producing a summary of all the donations from a single donor, perhaps in a specified time period.
- Group donations by in-honour contact. If several donations apply to a single in-honour (or in-memory) contact, then they are grouped together. A template can then use an LI formula to include information about each donation in honour of the particular person. Here is a fragment from a template that includes the amount and donor from each donation, followed by the total value of all the donations:
  <<LI {d_Total_Amount;d_Contact_Name}>>
  total: <<__d_Total_Amount>>
- Group donations by household; This produces one mail merge document per household. If all members of the household have donated, then all donations will be together in one document.

◆

For further information about templates that list multiple donations see *List Item Formulas* on page 506 and *Mail Merge From Donations List* on page 507.

Labels/Envelopes

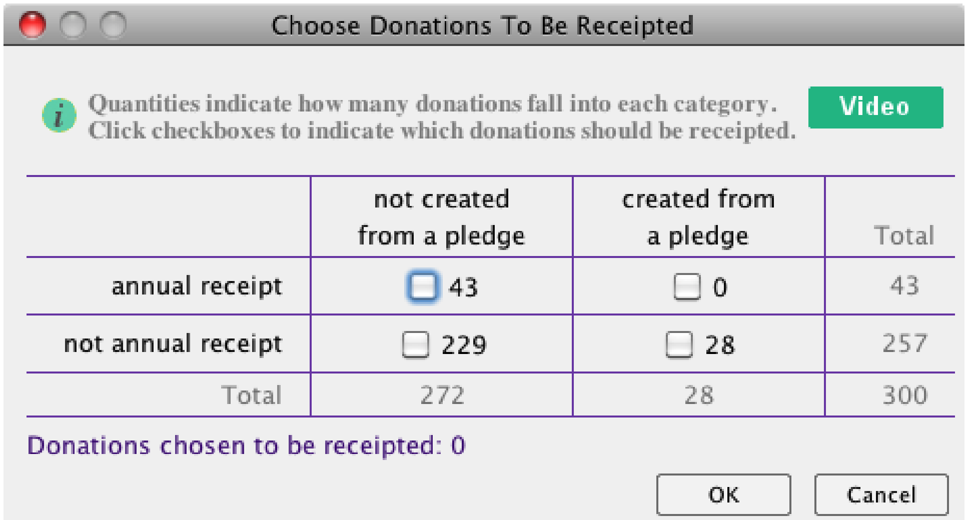
Print labels or envelopes for the CONTACTS identified by the selected DONATIONS. See *Labels, Envelopes, and Name Tags* on page 469.

Make Receipts

This button is used to assign receipt numbers to DONATIONS, and create charitable tax receipts for them. A Sumac administrator can specify which users are allowed to use this command in Utilities/Sumac Administration/Users. For further suggestions and details about making receipts, see *Make Receipts* on page 200.

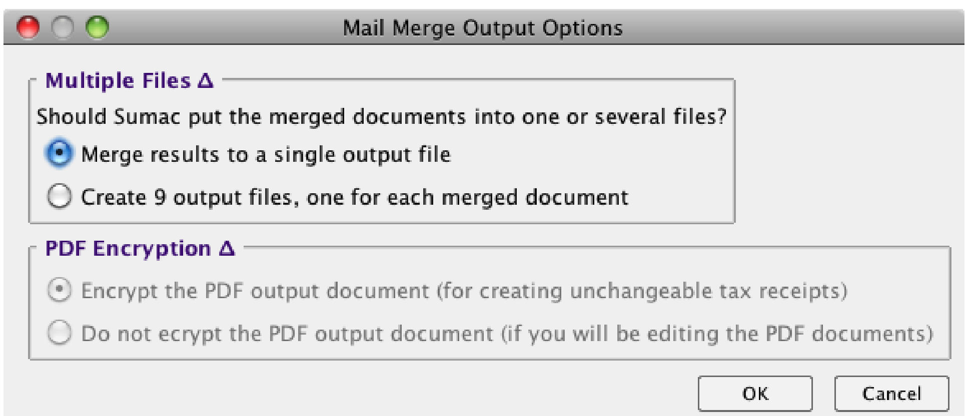
Hint: Note that a receipt template can be a multi-page document that includes a thank-you letter and perhaps two copies of a receipt.

When you are creating receipts for DONATIONS, if you choose DONATIONS that came from PLEDGES, or if you chose some DONATIONS from CONTACTS who want to receive only one receipt per year, then this dialog appears:



The dialog shows how many DONATIONS were created from PLEDGES or not, and how many are for CONTACTS who want annual receipts or not. Click check boxes beside the groups of DONATIONS for which you want to create receipts.

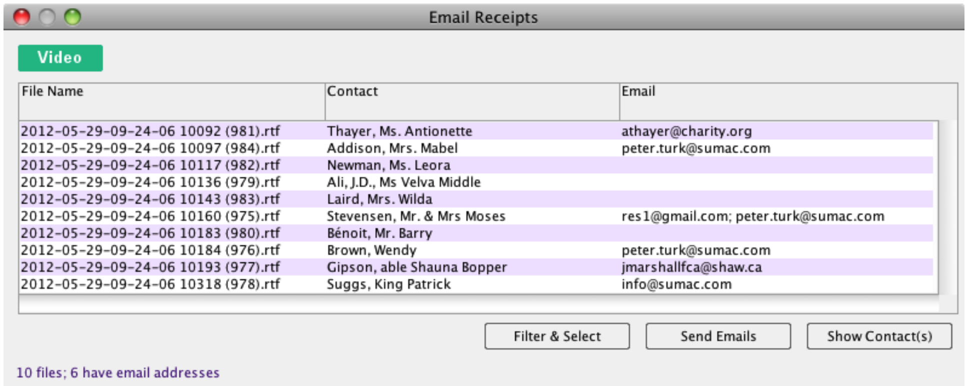
Then you will be given the option of saving all the output documents into one document or into several documents and, if you chose a PDF template, you can specify whether you want the PDF documents encrypted or not.



Then you are asked to specify the document template to be used for the receipt document. For information about document templates, see *Create Document Templates* on page 499.

Email Receipts

This button enables you to email all the receipt files in a folder to their corresponding CONTACTS. When you click the button, you are asked to choose the folder that holds the receipt files. Then this dialog appears:



After Sumac has determined which files correspond to a CONTACT with an email address, you can click to select the ones whose receipts should be sent by email. If none are selected, Sumac sends all of them.

> Hint: Sumac uses file names to identify the contacts. It expects the file names to be in the standard format of names generated by Sumac. If the files were generated by the Make Receipts button in the Donations list, then they contain the date and time, the donation ID, and the receipt number (in parentheses). If the files were generated by a Mail Merge button, then they contain the date and time, followed by the contact ID.

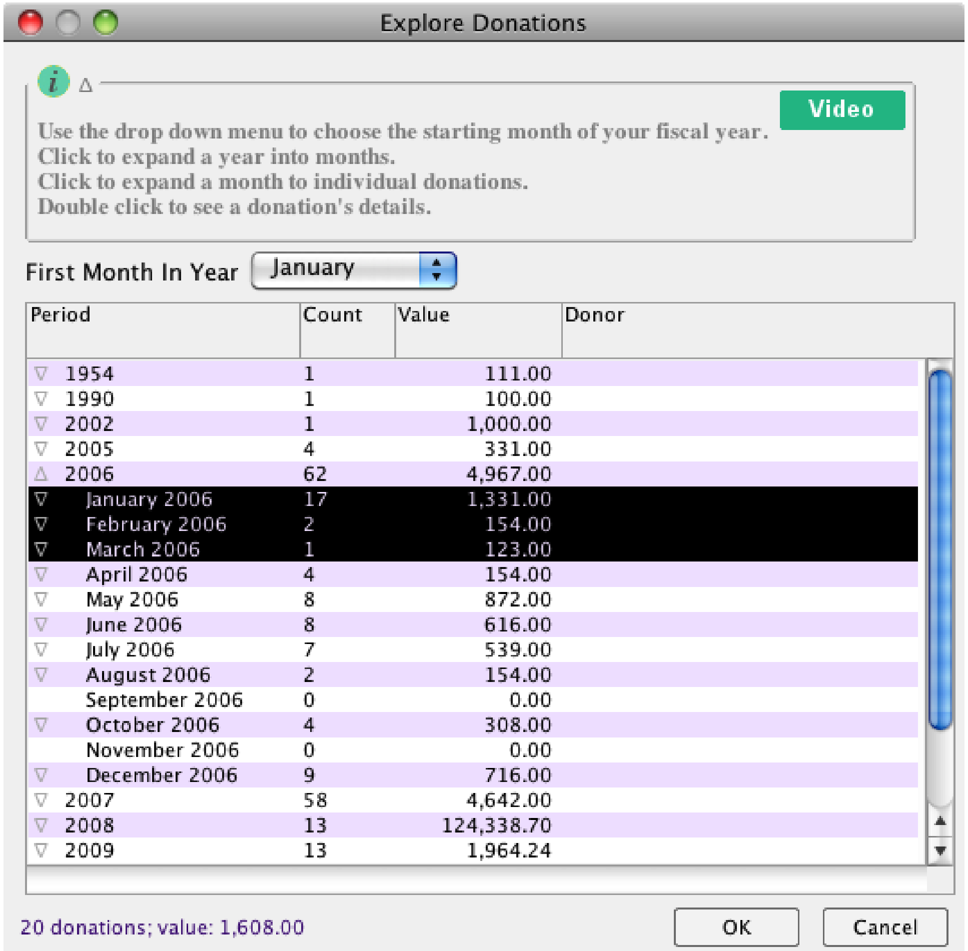
Filter & Select	Click this button to specify a communication preference which indicates that a contact does *not* want to receive emailed receipts.
Send Bulk Email	This causes Sumac to present the usual steps for sending emails (see *Email* on page 400). Each email that is sent will have a receipt file attached to it. You would typically use an email template that contains a thank-you letter and mentions that the receipt is in the attached file. Sumac automatically attaches the appropriate receipt file to the email for each recipient.
Show Contacts	When you click this button, you are asked which contacts you want to see: Make your selection, and click OK. Sumac shows the contacts in the CONTACTS list window.

Analyze & Report

In the Analyze & Report menu, Sumac has many helpful reports for managing, and analyzing your donations. Hover over the report title with your mouse to get a description of each report. The Explore, and Dashboard buttons are found in this area as well, and are described below.

Explore

Click this button to get a dialog like this:



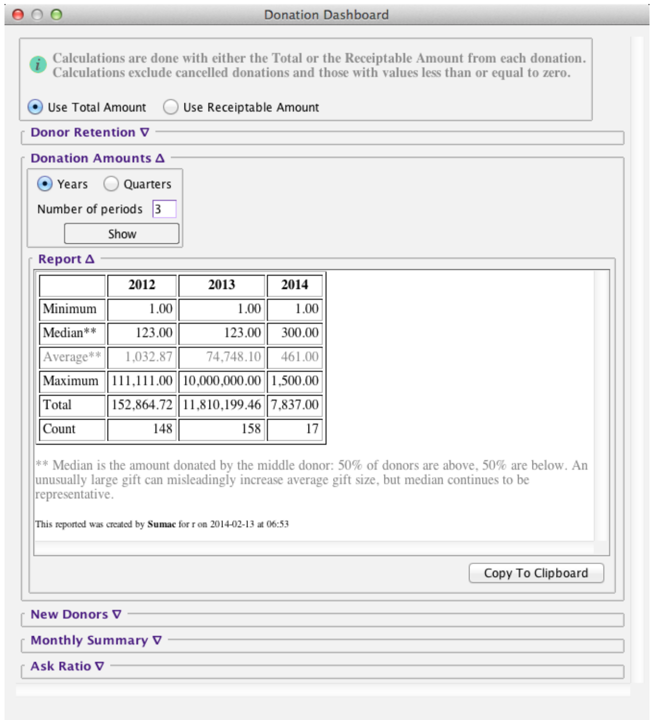
If your organization's fiscal year does not start in January, then choose the starting month. Then you can examine each year's donations, drilling down to months and individual donations.

Click the expansion icon for a year to see its months. Click the expansion icon for a month to see individual DONATIONS in that month. When you expand to show individual DONATIONS, you can double click to see the details of a DONATION.

Note that the status bar at the bottom of the dialog shows the total of the DONATIONS that are selected. For example, in the picture above, the status bar shows the total of DONATIONS in the first three months of 2006.

Dashboard

The Dashboard can show quick overview statistics that help guide your fundraising efforts. Here is an example:



The above picture shows five dashboards in one window: Donor Retention, Donation Amounts, New Donors, and Monthly Summary, and Ask Ratio. The Donation Amounts dashboard is expanded, and is being displayed for three time years.

Note the Copy To Clipboard button: each dashboard report can be copied to the clipboard then pasted into an email to send to other people, or into a spreadsheet for further analysis.

> Hint: You can have several dashboards open within one window. You can also have several dashboard windows open at once.

Donor Roll

Your organization may produce recognition listings, a Donor Roll, to identify donors and publish their names in a newsletter, to provide them with special recognition at an event, or to drive special recognition and COMMUNICATION.

There is a Donor Roll report under Analyze & Report in the donations list window. It gives the option of grouping donations by household. Because it is part of the donations list, you can search to include or exclude any records that you want to appear in the donor roll. The Donor roll report also allows you to group donations by household, or by any other relationship.

The Donor Roll automatically:

- produces a list of CONTACTS who made a DONATION in a specified time period
- groups multiple DONATIONS from the same CONTACT

- presents the Recognition information (in addition to the CONTACT'S name) for a DONATION that contains Recognition information
- groups DONATIONS by donor recognition levels, and sorts alphabetically by donor name within each recognition level
- allows you to choose which types of DONATIONS should be included in the report enabling you, for example, to produce one report for individual DONATIONS and a separate one for corporate DONATIONS.

In this Donor Roll report, there are two default columns showing currency amounts: *Amount* and *Total Amt.* When you are setting your selections for the report, you are also able to set check boxes that cause Sumac to include *Donation Notes* and *Total Amount By Payment Type* as columns in your output.

In each line of the report, the *Total Amt* column always shows the total value of DONATIONS from the CONTACT identified in the line.

The *Amount* column is usually empty. However, if a CONTACT made a DONATION and specified a special recognition for the DONATION, then each such special-recognition DONATION is listed on a separate line for the CONTACT. The value of a special-recognition DONATION appears in the *Amount* column.

Donor Recognition Levels

When you produce a Donor Roll, you have the option of specifying donor recognition levels. These levels should be in a tab-delimited text file. Each line in the file has two fields, separated by a tab:

- The first field on each line is the name of a category (e.g. Platinum Level, Gold Level, Silver Level).
- The second field on each line is the lowest dollar value that gets a donor into that category.

It is a good idea to have an *other* category that has a minimum donation level of 0, so that DONATIONS falling below your levels for special recognition will be identified separately in the report. If a DONATION falls below the lowest level in the file, then it is put into the lowest group.

Here is a sample file (→ represents a tab character which is invisible in most text editors):

```
Platinum→   1000
Gold→       500
Silver→     50
Other→      0
```

Sumac automatically sorts the categories from highest dollar value to lowest, so you do not need to put them in any particular order in the file.

Use the Donor Roll

Often a Donor Roll becomes part of another document – perhaps an annual or quarterly report. In this case, when you create the Donor Roll report, send the report to a file rather than to the printer. Then you can incorporate the file into the larger document you are preparing, and apply appropriate formatting.

Refresh

This command updates any records changed by other users since you opened the list by refreshing all the records from the database.

Enter Donations

Step One – Verify The Contact

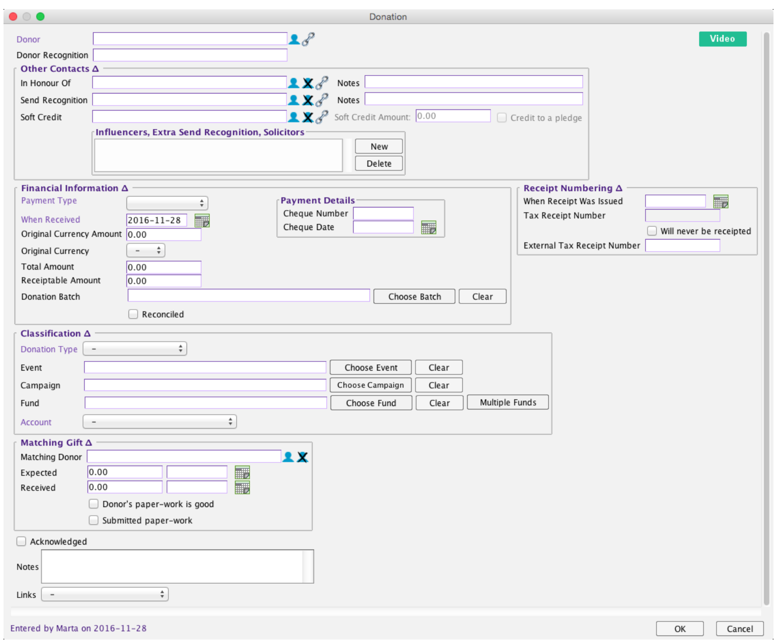
Purpose: Ensure that the contact is in the Sumac database, and use information on the donation form to update information about the contact.

- ✔ Show the contacts list.
- ✔ In the contacts list, find the contact making the donation.
- ✔ If the donor is in the list, then use information on the donation form to update the information in Sumac.
- ✔ If the donor is not in the list, then add the new contact. See *Enter Contacts* on page 104.

Step Two – Enter The Donation

Purpose: Enter details about the donation into the Sumac database.

- ✔ If you want to stay working in the contacts list, click to select the donor contact, then choose Donation from the New drop-down menu. Alternatively, if you want to enter the donation from the donations list, click the New button. This dialog appears:

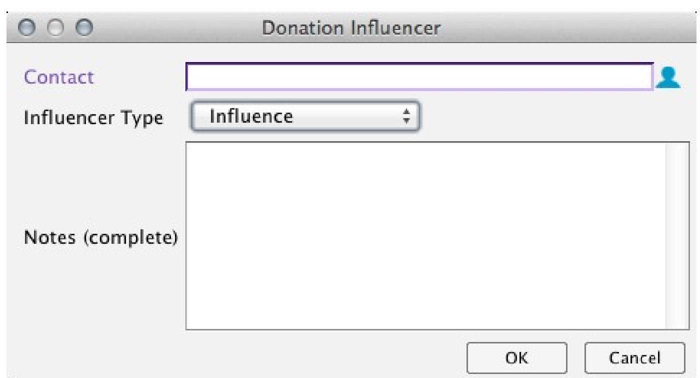


Note that the information is divided into panels which can be individually hidden or displayed by clicking their panel titles. For example:

- ◆ If you rarely or never need to connect a donation to contacts other than the donor, then click to hide the *Other Contacts* panel.
- ◆ If you do use Sumac's ability to assign receipt numbers to donations, then hide the *Receipt Numbering* panel.
- ✔ Fill in the details about a donation.
  - • Donor Recognition: By default, a donor is recognized in the donor roll by his name (first, middle, last). If this donation should appear in the donor roll in a special way, enter this special way of recognizing the donation in this Recognition field. For example, while Joe Smith may be making a donation, he may want the donor roll to also recognize his

wife; in this example, you might enter *Joe and Mary Smith* into the Recognition field. There is a field in each contact record that allows you to specify how donations from a contact should be recognized; Sumac automatically copies this recognition information from the contact record when a donation record is created.

- Donor: identify the contact making the donation. If you are working in the contacts list, the Donor has been pre-selected for you. If configured appropriately, entering the Donor may cause Sumac to also fill in the Soft Credit contact.
- In Honour Of: if this donation was in honour or in memory of another person, then choose that other contact. If the donation is in honour or in memory of something other than a contact (e.g. “In honour of my baseball team”), then enter the description in the Notes field beside the *In Honour Of* contact field. If configured appropriately, entering the in-honour or in-memory contact may cause Sumac to also fill in the Send Recognition contact.
- Send Recognition: if recognition of the donation should be sent to another person, other than the donor, then identify that contact. See *Create Donation Recognition Letters* on page 204. If you need to record notes about the recognition, then enter them in the Notes field beside the *Send Recognition* contact field. Note that if you choose a person to send recognition to, Sumac will show you a checkbox which you check when the recognition has been sent.
- Donation Influencers: You can add a list of contacts who had some influence over the donation, and add additional Send-Recognition contacts. Click the New button to get this dialog, specify the contact, and whether it is an influencer, solicitor, or and additional send-recognition contact.



- Soft Credit: if another contact should receive soft credit for this gift, then choose that contact. If your installation of Sumac has pledges, then choosing a soft credit contact causes additional fields to appear so you can allocate part of the soft credit to an outstanding pledge.
- Use drop-down menus to specify various attributes of the donation.
- If the donation should be allocated to two or more funds, then click the *Multiple Funds* button: Sumac prompts you to enter the funds and amounts to be allocated to each one.
- Note that there are two amounts to be filled in: one for the total amount of the donation, the other for the tax-receiptable portion of the donation. If the donation is a gift-in-kind, typically you leave the total amount field empty, and specify the receipt amount. For further information, see *Donations In Kind* on page 205.

Hint: For further information about the Donor Roll, see *Produce a Donor Roll* on page 195

- Matching Gifts: If you record and track information about matching gifts, Sumac provides an area for that information too. You can record the matching donor and the value of the gift that was expected and received. There are also checkboxes to indicate if the required donor paper-work is in place to get the matching gift, and whether the paper-work to get the matching gift has been submitted to the matching donor.

Hint: Your Sumac Administrator can set up Sumac so that when you enter a donor, the matching gift donor is automatically filled in too.

- Acknowledged: The *Acknowledged* checkbox allows you to record that the DONATION has been Acknowledged, i.e. that you have communicated with the donor to recognize his contribution. When you do a Mail Merge or Make Receipts operation in the DONATIONS list, Sumac asks if you want to set the Acknowledged checkbox, so you usually do not have to manually click this checkbox.
- Notes: if you need to make a special note about this DONATION, enter it in the Notes field. The Notes field should also be used to specify information needed for a gift-in-kind: e.g. the appraiser, and the appraised value. The Notes field can also be used to explain why a receipt was cancelled or re-issued.
- Will never be receipted: This checkbox means Sumac does not need to issue a sequentially-numbered receipt for this donation. It could be because a receipt was issued externally (e.g. by a payroll deduction system), because the donor does not want or need a receipt, or because you just don't issue receipts for amounts under (say) $10. The donation should be recorded the same as any other in every respect.
- External Tax Receipt Number: If another system, other than Sumac, has assigned a receipt number to this donation, then you can record that receipt number here.
- A donation can be linked to a funder request, to a pledge, or to other types of records in Sumac. Use commands in the Links menu to create and break these links as required. When a donation has been linked to other records, link buttons appear beside the Links menu; click a link button to view the related data record. If you hover your mouse pointer over the link button, the status bar at the bottom of the window shows what it is linked to. Also, if you hover for a moment longer, a small help window appears beside the link button to indicate what it is linked to.

✔ Click the OK button, to add the DONATION to the database.

✔ When you click OK, you may be given an option to set the renewal date for the current donor. Whether or not you are prompted to set the renewal date depends on a setting that your Sumac Administrator has chosen in the Preferences. If this DONATION is (at least in part) an annual renewal fee, then click Yes, and specify the new renewal date for the donor. Otherwise, click No.

Hint: If you are entering several DONATIONS, especially if they are similar (e.g. all related to the same event or CAMPAIGN), it saves time to use the Duplicate Last button that appears in the DONATION dialog. The

Duplicate Last button copies the contents of the previously edited or entered DONATION into the current one.

Donations and Households

Your Sumac Administrator can set a preference to warn you if you record a donation from a household member instead of from the household itself.

In addition, the Donor Roll report in the Donations list allows you to aggregate all the donations from a household.

One Donation For More Than One Purpose (Split Donations)

A CONTACT may make a DONATION with a single cheque, perhaps for $100. The CONTACT may then indicate that the money is to be partly (say $75) allocated to one CAMPAIGN or fund, and the balance ($25) is to be allocated to another CAMPAIGN or fund.

In Sumac, you handle this situation by entering multiple DONATION records, one for each part of the DONATION. Here are the steps to follow:

- ✔ Enter a DONATION that describes the first allocation of the donated amount. Follow the procedure *Enter Donations* on page 197.
- ✔ Create a second DONATION record to describe the second part of the DONATION. A lot of typing time can be saved by clicking the Duplicate Last button, which copies all the fields from the previously entered DONATION into the fields of the current one.
- ✔ Enter the data for the second part of the DONATION. Typically this involves a different amount, and a different fund or CAMPAIGN. Click OK to save the second part of the DONATION.
- ✔ If the single DONATION amount was to be split among more than two CAMPAIGNS or purposes, repeat the previous two steps to enter the third, the fourth, and all other parts of the split DONATION.

Hint: When receipts are issued, all the parts of the DONATION are automatically summed to create a single tax receipt.

Create Receipts

Hint: This procedure separates the creation of charitable tax receipts from the creation of thank-you letters. You can save time by doing both at once, using a single document template that generates a receipt and a thank-you letter within the same document, perhaps on the same form. For more information on Document Templates see *Create Document Templates* on page 499.

Step One – Create Folder to Hold Receipts

Purpose: Sumac assigns receipt numbers and creates the receipt documents all in one step. When you start this process, you are asked which folder should hold the receipts. It is easiest if you create this folder in advance.

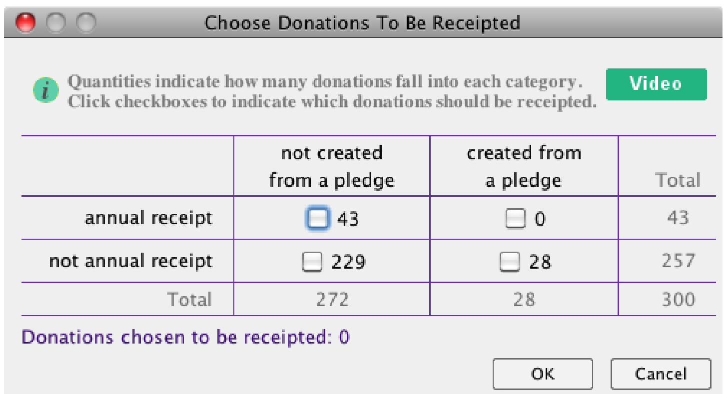
- ✔ Use the facilities of your operating system to create a folder in the appropriate place. Ensure the name is appropriate (e.g. *Receipts 2005 May*). Make sure that you create the receipts folder in a place that is backed up on a regular basis, so that these files will not be lost.

Step Two – Generate the Receipts

Purpose: Create receipts for DONATIONS for which no receipts have been issued.

- ✔ Show the DONATIONS list.

- ✔ Perform a search to find donations for which a receipt is needed. Do this by clicking the button to clear all search criteria, then setting the Unreceipted check box in the Searching area at the top of the window. Then click Search. The complete list of unreceipted donations appears in the window.
- ✔ If you do not want to create receipts for all donations in the window, click to select those for which you want to create receipts (see *Clicking To Select Entries In A List* on page 35).
- ✔ Click the Make Receipts button. If you are asked to indicate whether you want receipts for all the listed donations, or just the selected ones, make the appropriate choice.
- ✔ If any of the donations being receipted were made by contacts who only want one receipt per year, or if any of the donations being receipted were made in fulfilment of a pledge, then this dialog appears to allow you to specify which donations should be receipted:



- ✔ Sumac then shows you the number it is going to assign to the first receipt it creates. Normally this is fine, and you can just click OK. If, however, you assign non-consecutive or batch receipt numbers, specify a different number to be used, and then click OK.

  Hint: If you organize your contacts into segments, then Sumac can manage a different sequence of receipt numbers within each segment. When you are asked to enter the first receipt number to use, Sumac lets you choose the segment whose donations are being receipted, and it suggests the next receipt number within that segment.

- ✔ Now Sumac asks if you would like to use a predefined set of receipt templates. For more on creating document templates, see *Create Document Templates* on page 499. If document templates in your installation of Sumac have been organized into sets, you may see a dialog, asking you to choose which set of templates to use. Either select your receipt templates here and click Use Set, or do not select any and click Do Not Use Set.
- ✔ Next Sumac asks if you want all the resulting receipts to be in one merged document or in multiple documents – one per receipt. Make your choice and click OK.
- ✔ Choose the appropriate document templates or set of document templates.
- ✔ Finally, you are asked to specify where Sumac should put the receipts that it creates. Choose the folder you created in Step One, then click the Open button. Sumac starts creating receipts.

- ✔ When Sumac is finished creating the receipts, you will see that the DONATIONS list shows the newly assigned receipt numbers.

  Hint: If the group of DONATIONS to which you are assigning receipt numbers contains more than one DONATION from a single CONTACT, then only one receipt will be generated, and the same receipt number will be assigned to multiple DONATIONS from the same CONTACT.

Step Three – Print the Receipts

Purpose: Generate paper copies of the receipts that were just created.

- ✔ Use the facilities of your computer's operating system to open the folder where you told Sumac to put all the receipts – the one created in Step One. Note that the last part of the file name for each receipt is the receipt's number.
- ✔ If you have a small number of receipts to print, or if you had all receipts saved to a single file, you could open each of them individually and print them, one at a time. Print two copies of each: one for the donor and one for your organization's records.
- ✔ Alternatively, you can use the facilities of the operating system to select all the receipts, and choose a single Print command to print all of them at once.

  Hint: The receipt files generated are read-only, to prevent accidental modification.

Regenerate Receipts

If you need generate receipts for a donation that has already been receipted, you can select the donation, and click Make Receipts. Sumac prompts you by saying that receipts have already been generated, and gives the option to regenerate receipts. This way you can make receipts without accidentally creating a new receipt number.

Ensure Security of Receipts

Here is a checklist of suggestions for ensuring privacy of DONATION information.

- ◆ The Sumac Administrator should set up user capabilities (see the *Sumac Administrator Manual*) to ensure that only known people are allowed to use Sumac and only the ones who need to see, edit, or delete DONATIONS are allowed to do so.
- ◆ Treat Sumac user IDs and passwords with respect. Provide one ID and password for each user. Keep passwords secret.
- ◆ Ensure that only responsible users who understand the economic significance of a tax receipt are allowed to edit DONATIONS in Sumac.
- ◆ Save the tax receipts for each year (or month or quarter – whatever is most convenient) in one folder. Ensure that this folder is password protected and that only responsible authorized users are able to access it. Ensure that this folder is regularly backed up and archived.

Here are two strategies that can be implemented for managing your tax receipts:

- ◆ You can print two copies of the receipt and mark one as "Copy" that you can file. Note that a single document template file can generate two copies of the same receipt at the same time, and the second can have the word "Copy" prominently displayed.

- You can also opt to create a template with one copy that you print for the donor and save the organization copy stored in a secure folder on your computer.

Canceling a Receipt

Sometimes a receipt is issued and, for any number of possible reasons, it becomes invalid. It needs to be cancelled.

Here are steps you can follow when a receipt is no longer valid:

- ✔ Move the electronic receipt document – probably word processing file – into a folder named Cancelled *Receipts*.
- ✔ If you preserve paper copies of the receipts, mark all such paper copies "Cancelled", and store them in a separate paper folder.
- ✔ In Sumac's DONATIONS list, find the DONATION that is being cancelled. Double click to display it:
- ✔ Click the *Cancelled Receipt* check box to indicate the receipt has been cancelled. Click Yes when you are asked to confirm the cancellation. You are then asked to provide an annotation to indicate why the receipt is being cancelled. Type in the reason and click OK. Check that the Notes field correctly represents the reason and date of cancellation, then click OK.
- ✔ Once the receipted DONATION has been cancelled, most Sumac reports and calculations ignore it.

Hint: Cancelled receipts are displayed grey, instead of black, in the DONATIONS list.

Re-Issuing a Receipt

What if a CONTACT loses the receipt that you send him or her, or if the receipt contained incorrect information that needs to be corrected?

Depending on what records you routinely keep about receipts, different actions are needed:

- If you keep paper copies of the receipts you issue, then photo-copy the receipt that was previously sent to the CONTACT.
- If you do not keep paper, but keep electronic copies of the receipts (the output files created by Sumac when you click the Make Receipts button in the DONATIONS list), then print a copy of the saved file. If you do not have an electronic signature built into the document, then you need to get this newly printed copy signed.
- If you do not keep paper or electronic copies of receipts, then you can regenerate the receipt. In the DONATIONS list window, search to find the relevant DONATION(S) with the particular receipt number. Click the Mail Merge button (*not* the Make Receipts button, since a receipt number has already been assigned to the DONATION). Choose the usual document template for making receipts, and generate a new copy of the one that was lost.
- If some of the details of a receipt are wrong (e.g. name of donor, amount), then you need to issue a changed receipt. But once a receipt number has been assigned to a DONATION, you can only edit selected fields in the DONATION record. If the fields you are allowed to edit are all that are needed to fix the problem, then edit them and use Mail Merge to create the receipt again. If, however, other fields need to be changed, you must create a new DONATION record (with all details corrected), issue a receipt for the new DONATION record, and then cancel the old receipt. Use the Notes field of the

new DONATION record to indicate the number of the receipt that it replaces and make sure that this information appears in the receipt itself. Similarly, when you cancel the old DONATION record, enter the number of the new receipt that replaces the old one. This creates cross references between the old and new receipts.

Create Thank-You Letters

Hint: This procedure separates the creation of receipts from the creation of thank-you letters. You can save time by doing both at once, using a single document template that generates a receipt and a thank-you letter within the same document, perhaps on the same form.

Here are the steps to follow:

- ✔ Create a document template for generating the letters. The document template defines the letter that is to be generated, and indicates blanks that Sumac should fill in with values from the database. For more on creating document templates, see *Create Document Templates* on page 499.
- ✔ Create a folder to hold the letters being generated. Sumac creates the thank-you letters all in one step. When you tell Sumac to start merging the template with data from the database, it asks which folder should hold the letters. It is easiest if you create this folder in advance.
  - Use the facilities of your operating system to create a folder in an appropriate place. Ensure the name is appropriate (e.g. *Thank You Letters 2005 July*) for the letters being created.
- ✔ Generate the letters from the DONATION records.
  - Show the DONATIONS list.
  - Perform a search to find DONATIONS for which you wish to create thank-you letters. If necessary, click in the resulting list to select those for which you want to create letters (see *Clicking To Select Entries In A List* on page 35).
  - Click the Mail Merge button.
  - Next Sumac asks if you want all the resulting documents to be in one big file or in multiple files – one per document. Make your choice and click OK.
  - Next, you are asked to specify the document templates to be used to create the letters. Choose the appropriate document templates.
  - Finally, you are asked to specify where Sumac should put the letters that it creates. Choose the folder you created earlier, then click the Open button. Sumac starts creating letters.
- ✔ Print paper copies of the letters that were just created.
  - Use the facilities of your computer's operating system to open the folder where you told Sumac to put all the letters.
  - If you have a small number of letters to print or they were all put into one file, you may wish to open and print each of them individually.
  - Alternatively, you can use the facilities of the operating system to select all the letters, and choose a single Print command to print all of them at once.

Create Donation Recognition Letters

If a CONTACT has been selected in the Send Recognition field of one or more DONATIONS, then you need to generate appropriate letters to send to them. You can follow the same basic approach described in *Create Thank-You Letters* on page 204 but note these additional factors:

- When you search for DONATIONS, you can find those that specify a Send Recognition CONTACT by clicking the Send Recognition check box in the Searching area of the DONATION list.
- The template for generating the letters should use <<d_In_Honour_Contact_Salutation>> for the salutation, and use <<d_In_Honour_Contact_Address>> for the address of the CONTACT.

Batch Donations

Often DONATIONS are batched, i.e. several are accumulated, perhaps over the course of a week, then entered into Sumac all at once.

Sumac generates several reports that are helpful for the reconciliation of batches of DONATIONS. These reports let you see DONATIONS in a specified time period grouped in many different ways (e.g. by account, by payment type). In the Reports dialog, these reports are grouped under the heading *Donations – reconciliation*. Each of these reports shows all the DONATIONS in a particular time period (perhaps the last week or month) with subtotals for the major grouping of the report (e.g. account, payment type, purpose, receipt number). They also show receipt numbers for the DONATIONS, so you can quickly check to see if there are any unreceipted DONATIONS that should have been receipted.

In addition, you can define batches, assign each donation to a batch, and Sumac can then generate batch totals, and product batch reports to support aggregation of donations for bookkeeping purposes.

Donations In Kind

Accounting Issues

There are two currency fields in all DONATION records: one indicates the Total Amount of the DONATION, the other indicates the Receiptable Amount of the DONATION. Depending on how you want to use Sumac, there are two basic ways to use these fields when dealing with DONATIONS in kind. Assume you have a DONATION in kind that is worth $100. You could record it either of these two ways:

	First Method	Second Method
Total Amount:	0	100
Receiptable Amount:	100	100

First Method: Record the value of the in-kind DONATION in the Receiptable Amount field and set the Total Amount field to zero. This method causes reports that summarize the total value of DONATIONS to show the amounts of cash actually received. If you want to see the total value of DONATIONS including non-cash ones, you need to add in the value of DONATIONS in kind.

Second Method: Record the value of the in-kind DONATION in both the Receiptable Amount field and the Total Amount field. This method causes reports that summarize the total value of DONATIONS to show the total value of all DONATIONS received. If you want to see the total value of cash DONATIONS, you need to subtract the value of DONATIONS in kind.

In this manual we suggest using the First Method, but neither way is particularly better than the other. It is, however, very important that you are consistent, using only one approach and not mixing them.

Recording the Donation

In-kind DONATIONS are recorded and receipted similarly to regular monetary DONATIONS with the following exceptions. When entering a new in-kind DONATION:

- For the DONATION type choose *in-kind* from the drop-down menu. If this selection is not available, contact the Sumac Administrator to add this entry to the lookup list of DONATION types; it is important to distinguish an in-kind donation from others.
- For the Total Amount, enter *0*.
- For the Receiptable Amount, enter the estimated value[3] of the gift.
- Enter the details of the estimate or value statement in the Notes field.

If you consistently follow the practice of both describing donations in-kind in the Notes field, and setting the Total Amount field to zero for these donations, then you should ensure that the Notes field is part of the tax receipt template for this type of DONATION. Document templates can use include formulas to do this automatically (see *Include Formulas* on page 523).

Deleting a Donation Record

The Sumac Administrator must give special privileges to a user to enable the user to delete a DONATION. A DONATION record should only be deleted in *very* unusual circumstances. One possible situation is when a tax receipt has been issued with an error, and has not yet been sent out to the donor. In this situation:

- ✔ Delete the incorrect record, noting the tax receipt number.
- ✔ Enter a new DONATION, correcting the error that was in the faulty one.
- ✔ Generate a new receipt: Use the regular process for creating tax receipts with these changes:
  - only generate a receipt for the single donation that was just corrected
  - when asked for the starting tax receipt number, enter the tax receipt number of the DONATION that was just deleted.
- ✔ Move the incorrect electronic tax receipt document into a secure folder named *Incorrect Receipts*.

Procedure: Donor Recognition

Donors appreciate being recognized for their DONATIONS. Sumac's *Donors – donor roll* report instantly generates a donor roll report, which can group donors by categories (which you define). This report makes it particularly easy to include a donor report in monthly or quarterly newsletters. For further information about the Donor Roll, see *Produce a Donor Roll* on page 195.

Procedure: Email Receipts

Sumac can generate donation receipts. See *Create Receipts* on page 200. If you intend to print the receipts, you are likely to use a word processing (rtf or docx) template that generates a thank-you letter and receipt. This produces a document that can then be printed and sent through the postal system.

If, however, you want to email tax receipts, you should use a PDF (Acrobat) template instead. This is because when Sumac uses a PDF template, it encrypts the resulting documents so that they cannot be changed. These unchangeable

[3] In Canada, Canada Revenue Agency requires that you document the value of in-kind donations. For further information, see their website at http://www.cra-arc.gc.ca/tax/charities

electronic documents satisfy government rules about electronic receipts. For further information about emailing receipts see *Email Receipts Button* on page Error: Reference source not found.

Procedure: Enter Donations

When entering DONATION information into Sumac, you need to deal with two issues:

- get the data into the Sumac database, and
- ensure that the data, as entered, corresponds to your source documents.

Entering Donation Data

Source documentation about DONATIONS should be handled meticulously, whether it is in electronic form (a file of DONATIONS recorded elsewhere), or paper documents.

Ensure that you enter each DONATION once. Make sure you don't miss any of them, whether from a file or paper documents. Ensure that the number of DONATIONS coming in and the number actually put into Sumac are the same.

Ensure that you don't enter a DONATION twice. Check them off as you go. Ensure that no co-worker has already enter the DONATIONS from a file or pile of paper into Sumac.

The actual entry process depends on the source of the information being entered: whether it is from paper documents (e.g. cheques received in the mail) or from an electronic file generated elsewhere (e.g. a list of donors from a web site).

Paper Source Documents

In the DONATIONS list, click the New button, and enter each DONATION. Note that the Duplicate Last button usually saves a lot of time in manually entering similar details.

Alternatively, use the CONTACTS list to enter the DONATIONS. This gives you the opportunity to check that Sumac's CONTACT address information is current according to the incoming DONATION documents.

Electronic File Source

First, choose Utilities/Import/Import Workspace in the Sumac Console. Open the electronic file of source data. Use functions in the Import Workspace to validate dates, CAMPAIGNS, DONATION types and purposes, events, accounts, payment types, currency amounts, and CONTACT IDs or names. If Import Workspace finds problems, fix them before proceeding to the next step.

Once the data is known to be clean and correct, use the Import command to import the DONATIONS into Sumac.

Validating Donation Data

Usually you enter DONATIONS in batches:

- all the DONATIONS received in the paper mail today or this week
- a file of DONATIONS made by means of an online contribution system over the last day or week.

Sumac provides various ways to ensure that all the DONATIONS in a batch were correctly entered into Sumac:

Status Line

Below the buttons in the DONATIONS list, there is a status line. It shows the total number and value of DONATIONS in the list. If you click to select some DONATIONS, the status line shows their total number and value too.

If you enter a batch of paper documents, this total count and value of the DONATIONS entered should match the incoming documents.

Donation Batches

You can create a donation batch, and add the donations to it. When you do this, Sumac automatically counts and totals all the donations in the batch. For further information about donations batches, see *Batch Donations* on page 205.

Reports

When you click the Reports button in the Sumac Console, you can expand the *Donations – reconciliation* category to see that Sumac can provide several variations on reports about DONATIONS by account, payment type, purpose, and receipt number.

Choose the most appropriate report(s) for your needs, and generate them. Ensure that the report totals correspond to those in your source documents.

Events

Introduction

Your organization may host sports events, dinners, press conferences, or other special events to draw attention to your organization and its cause. Frequently CONTACTS make DONATIONS in response to an event.

When entering information about a COMMUNICATION, you can specify that the COMMUNICATION was associated with an event. The event must be chosen from this lookup list.

If you sell tickets to events, then Sumac Ticketing allows you to choose the event for each ticket.

Notes for the Sumac Administrator

Field Preferences

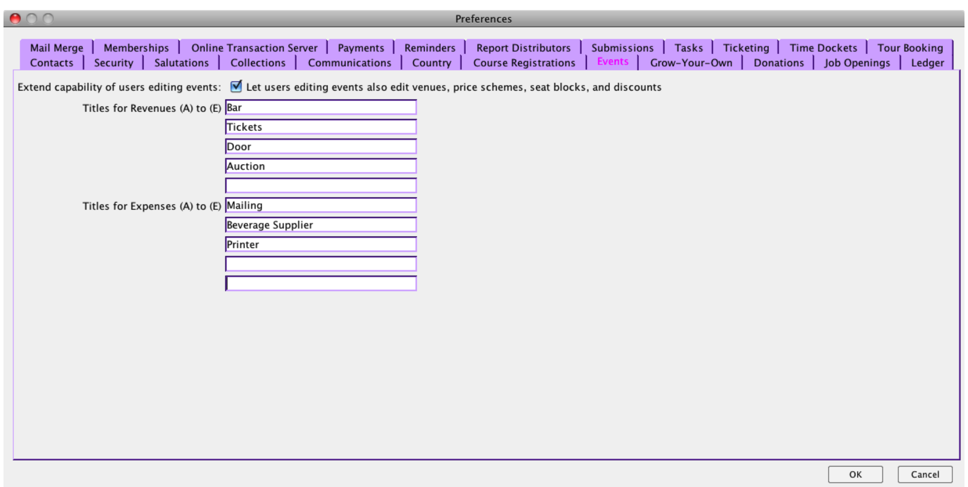
Use the Utilities/Customize Database/Field Preferences command in the Sumac console to:

- re-label fields
- completely remove fields from the user interface
- make fields mandatory, or
- determine which fields should appear on a website.

in Event records.

Preferences

The Utilities/Customize Database/Preferences command in the Sumac console contains options that affect how events appear to users.



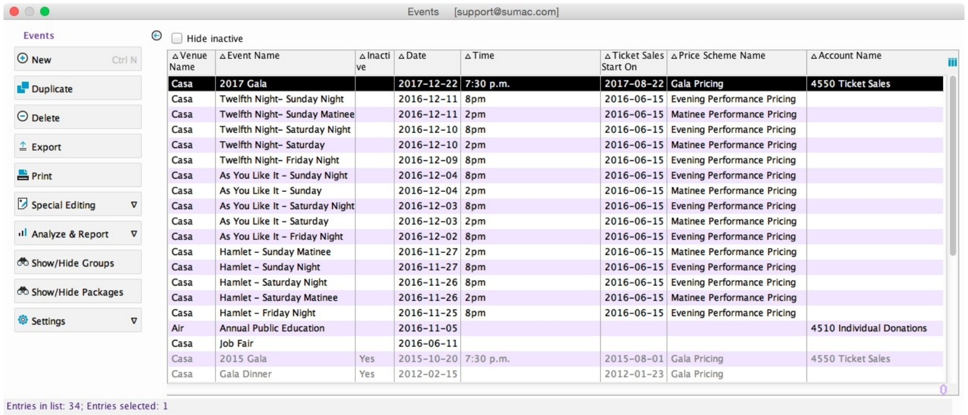
Convenient Editing

If users who are allowed to edit events should also be able to edit event-related lookup lists, then click this option. Its effect is to put a drop-down menu into the Events list window, and the drop-down menu lets users edit the related lookup lists.

Titles

Events can record up to five revenue and expense amounts. You can specify more meaningful labels for these amounts.

The Events List



Near the top of the Events list window, there is a Hide inactive check box. When you set this check box, Sumac hides all inactive events, event groups, and event packages so they do not show in your lists. If old historical records have been marked *inactive*, then this check box lets you show only current relevant information.

When you are showing event groups, and click to expand an event group and show its events, you can double-click the event to view and edit it.

Buttons

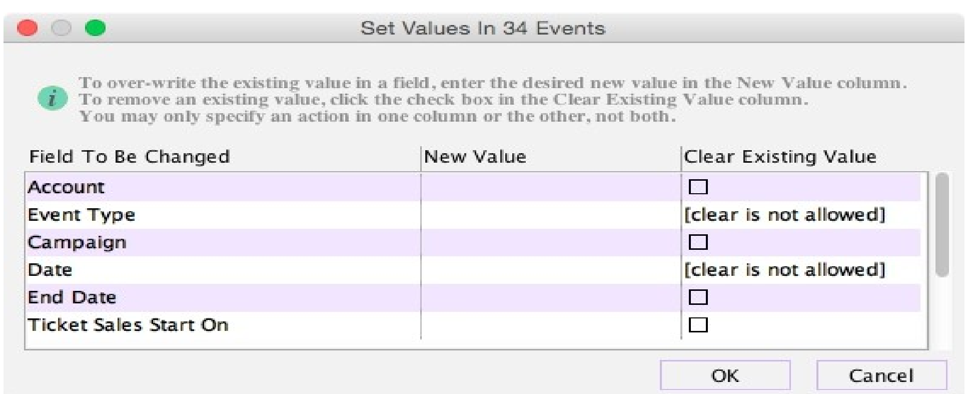
Many of the buttons in the EVENTS list are the same as in other record lists, so they do not need to be mentioned. Below is a list of buttons unique to the events list.

Special Editing/Bulk Edit

This button enables you to change values in several fields of several EVENTS all at once.

Hint: Only users with bulk import capability can use this button.

When you click this button, there are warning dialogs that caution you to be very careful when setting values. Then this dialog appears:



Key in a new value for each field that you want to set. Click check boxes to indicate which fields are to be cleared (in contrast to being set to a new value).

When you click OK, the changes are made.

Analyze & Report/ Info-Details

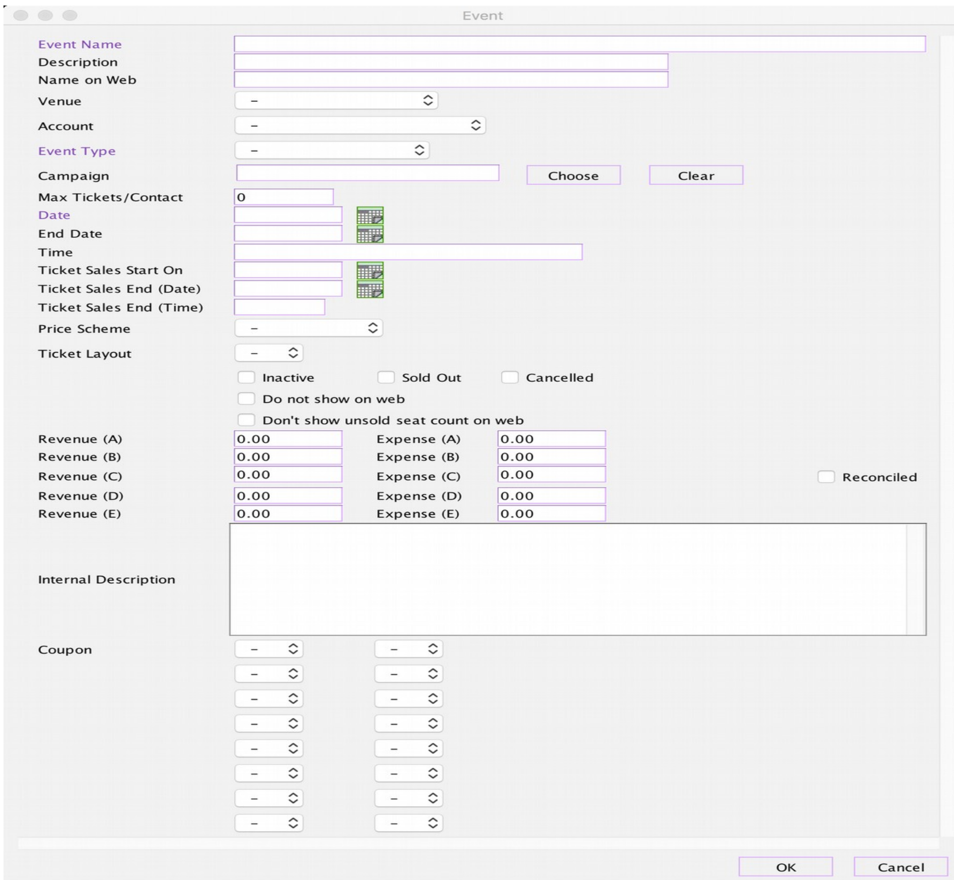
Use this report for a summary of the other records linked with your events. Such as COMMUNICATIONS, DONATIONS, TICKET SALES, etc.

Show/Hide (Groups and Packages)

With these buttons, you can show the event group and package lists in the same window as your EVENTS list.

Enter Events

The dialog for entering and editing events looks like this:



Note that if your installation of Sumac does not have Sumac Ticketing, then some fields that relate solely to ticketing (e.g. Ticket Sales Start On) are omitted.

When you specify an event, you must enter:

- Event Name: the text to appear in a drop-down menu of user choices
- Event Type: chosen from the event type lookup list described below
- Date: the date on which the event occurred or will occur.

These fields are optional:

- Max Tickets/Contact: If you wish to prevent a single contact from buying a large number of tickets, specify the maximum number of tickets per contact.

- End Date: if the event takes place over several days, then you can enter the last date in this field.
- Venue: optional indication of where the event occurred or will occur
- Account: tickets for an event should be accounted for under a specific account number
- Campaign: an event can point to a campaign. If you are entering a donation, and associate the donation with an event, then Sumac automatically connects the donation to the event's campaign.
- Description: a more detailed description of the event. If you use Sumac Ticketing, this description provides extra information to ticket sellers.
- Name on Web: If you have integrated your Sumac database with your website, you may want the event name presented on the web differently from your internal name. So you can put the web name in this field. If this field is empty, then Sumac uses the Event Name field on your website too.
- Time: the time of day when the event occurred or will occur. Note that Sumac does not check this field to make sure it is a valid time of day. So you can put something like "sunset" as the time of the event.
- Ticket Sales Start On: this field indicates when ticket sales can start.

  Hint: Before it is possible to use Sumac Ticketing to order tickets for an event, you must set the date of the event, the date on which ticket sales commence, and the price scheme to be used for the event.

- Ticket Sales End (Date and Time): Indicate when ticket sales should no longer be available for sale.
- Price Scheme: this field indicates the pricing to use for this particular event.
- Ticket Template: you can specify a layout file for printing the tickets for this particular event.
- Inactive: You can mark an event as inactive. Inactive events do not appear in the DONATIONS list and COMMUNICATIONS list searching panels. Inactive events also cannot be specified when a user is entering a new DONATION or COMMUNICATION.
- Don't display on web: You can also indicate that an event should not be displayed on the web. This applies to online ticketing. If you want to make certain events available only to people who call in to your box office, not to those who order tickets over the web, then click this check box.
- Don't show unsold seat count on web: Click this checkbox to suppress the display on your website of how many seats are available.
- Sold Out: Click to indicate the event is sold out. If you click to indicate that an event is sold out, then on your website, its name will be prefixed by **** Sold Out ****.
- Cancelled: If the event never took place, you can note that by clicking the Cancelled checkbox.
- Revenue (A) to Revenue (E): If you made revenue from this event, perhaps by selling refreshments, you can record the revenue in these fields.
  - Hint: Sumac can automatically calculate the donations from an event, and also event attendance. You can display these as columns in the events list So you do not need to use the Revenue fields for this type of information.
- Segment: You can associate an event with a contact segment. This restricts the Choose Event window by segment, causes the events list to show only

events that are in segments the user can see, and causes the editing of a single event to be restricted to segments that the user can see.

- Expense (A) to Expense (E): If you incurred expenses in presenting this event, you can record the expenses in these fields.
- Reconciled: If this checkbox is set, then all the Revenue and Expense fields are locked. Only users who are allowed to edit Ledger Entries are allowed to click this checkbox.
- Segment: If you have divided your database into segments, you can specify a different payment processor account for each segment. If you want the revenue from this event, perhaps through online ticketing sales, to be directed to a particular payment processor, then you can choose the appropriate segment using this drop-down menu.
- Internal Description: This description provides details about the event that should be available to people selling tickets in the box office. It is not displayed on your website.
- Coupons: If some discount coupons can be applied to tickets purchased for this event, use the drop-down menus to choose the applicable coupons. Up to 16 coupons can be assigned to a single event.

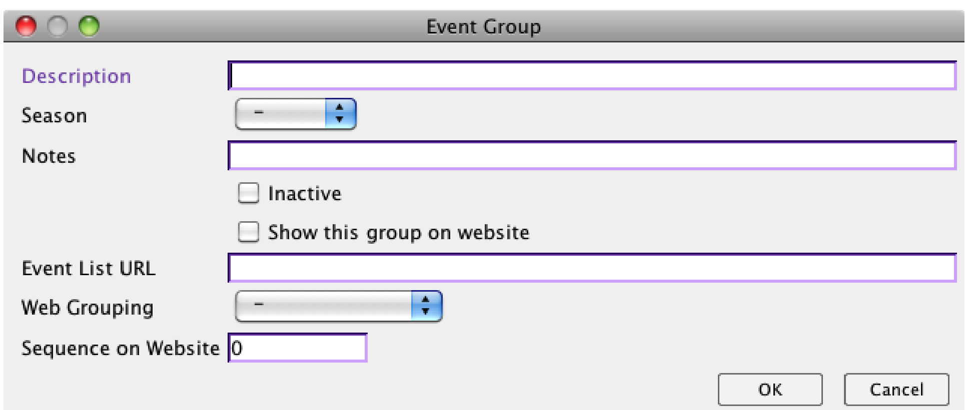
When entering a series of events, field values from the last one entered are remembered. This can significantly accelerate the entry of a series of related events (e.g. several performances of the same work, on different nights).

Event Groups

You can define event groups. Events can be grouped any way you want: perhaps all the fundraising events in the last quarter, all the performances of a particular theatrical presentation, or all the orientation sessions run in a year.

To define an event group, do the following:

- ✔ Click the Show Groups button. This causes an additional scrolling list, showing event groups, to appear to the right of the list of events.
- ✔ Click the New button under the list of event groups. This window appears:



- ✔ Enter at least a description for the event group. If you wish, specify the event group's season, and a note. Eventually, when the event group is no longer active (after the year or season it was part of), you can click the Inactive check box.
- ✔ If this event group is a list of all the shows in a production group, then click *Show as a production in website ticketing*. This causes this event

group to be listed as a production; a website user can choose a production, then pick an event within the production for choice of tickets.

- ✔ *Event List URL* is a URL to information that will be used for displaying extra information on your website when a website user asks to see additional information about the event group (production).
- ✔ *Web Grouping* is the top level break-down of the ticketable events and event groups. You may wish to break your events into a regular season and a summer season, or perhaps events occurring at different venues.
- ✔ *Sequence on Website* is the order you want this group displayed relative to other groups of events on your website.
- ✔ Click OK to save it in the database.
- ✔ Drag events from the left-hand side list of events, and drop them onto the event group. This adds the events to the event group.

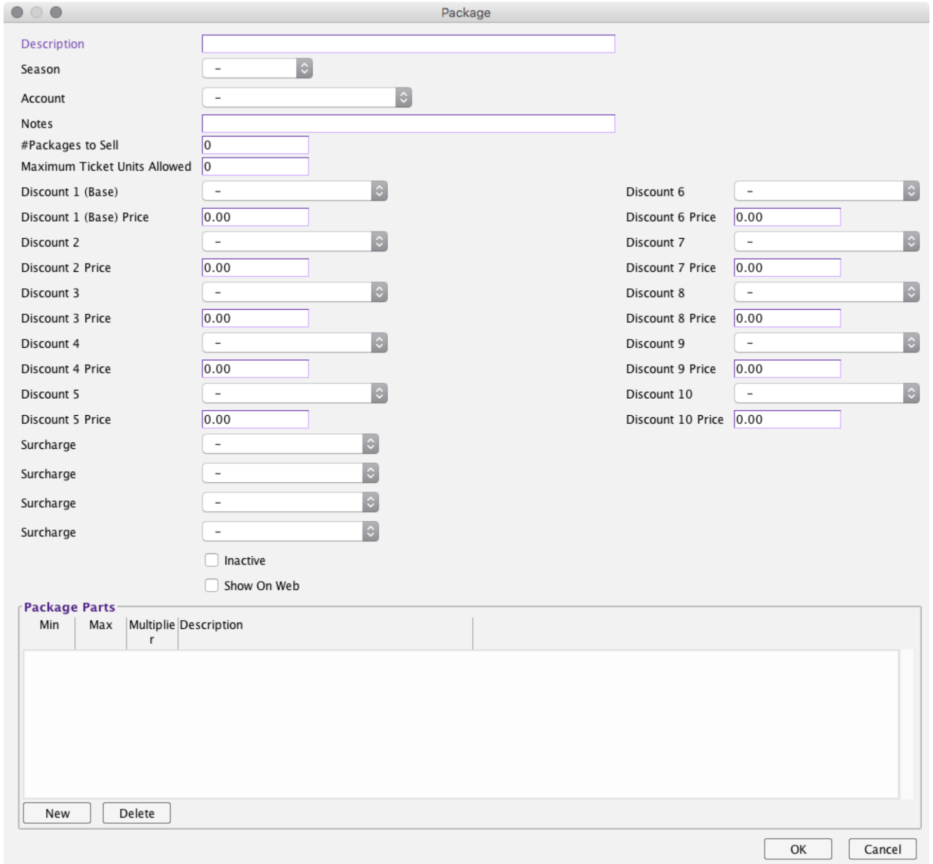
Event Group List Buttons

The list of event groups has New and Delete buttons for creating and deleting event groups. In addition, there is a Remove Child button for removing a child event or package from within its containing group. There is also a Sales Report button that summarizes sales of tickets for all the events in a selected event group.

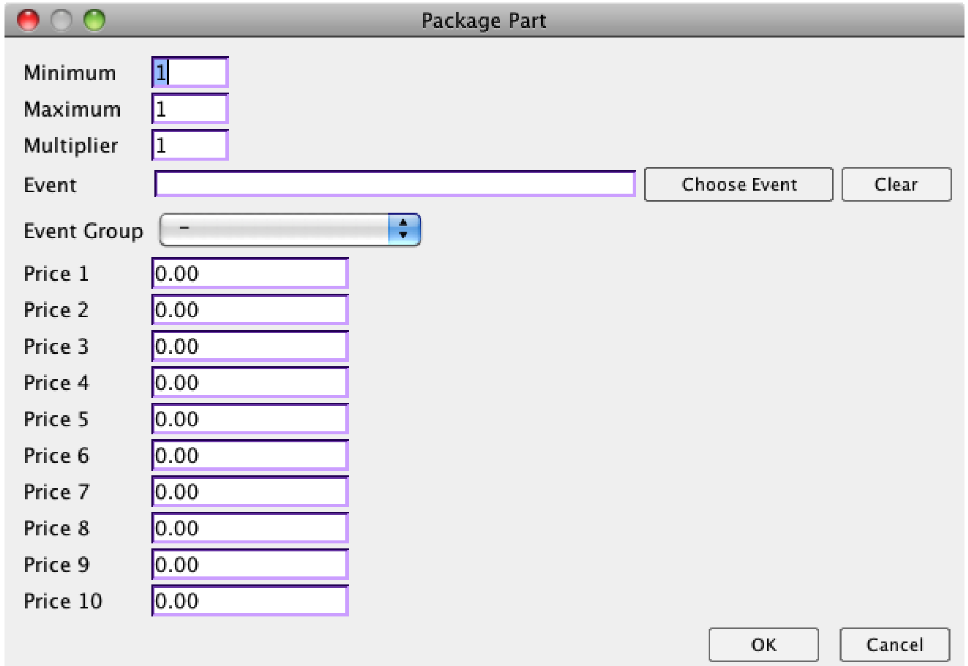
Event Packages

If you have the Sumac Ticketing module, you can define packages – the events in a subscriptions series, and the rules that a user must follow in selecting specific events within the package. To create a package, follow these steps:

- ✔ In the Events list, click the Show Packages button.
- ✔ Click the New button under the list of packages. This dialog appears:



- ✔ Name the package. When a patron buys the package, the patron is able to choose tickets from the events or event groups that make up the parts of the package. Each ticket has a weight or count. Specify the maximum count – the number of units that a patron may choose.
- ✔ Specify up to 10 price points or discount levels at which the patron can purchase the package.
- ✔ If you want to sell this type of pacakge on your website, then set the *Show On Web* checkbox.
- ✔ Click New to add parts to the package. A part is either an event or an event group.



Hint: You can add parts to a package by dragging events and event groups and dropping them onto the package.

- ✔ Indicate how many tickets (minimum and maximum) a patron may choose from the event or event group identified by a package part. If tickets in this part should be given extra weight, then enter a multiplier other than 1; note that this weight is used to ensure that tickets chosen from a package do not exceed the Maximum Count field in the Event Package.
- ✔ The prices in a Package Part indicate the portion of the overall package price that should be allocated to tickets in each part.
- ✔ The Show On Web checkbox specifies that this package should be made available for sale on your website.

Forms

Introduction

A Sumac Form is similar to a paper form that can be filled out and filed along with other information about a contact.

Comparison to Grow-Your-Own

Forms are similar to Grow-Your-Own records: they are completely customizable records residing in your Sumac database.

Forms are usually used to add additional details to contact records, and provide the extra ability to have the contacts themselves fill out the forms on your website. Grow-Your-Own records provide for more complex specialized types of records.

Here are some differences:

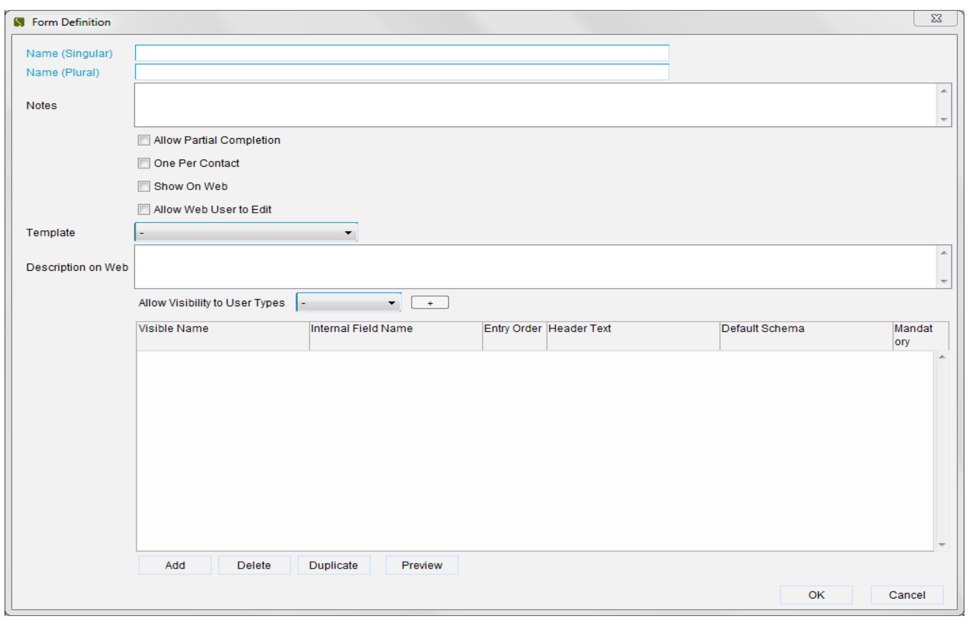
Issue	*Grow-Your-Own*	*Forms*
number of different types	You can have at most two types of Grow-Your-Own records.	You can define an unlimited number of types of form records.
record linking	Grow-Your-Own records can be linked to each other.	Form records cannot be linked to other form records.
list window	There is a separate list window for each type of Grow-Your-Own record. The main Sumac Console window has a separate button for each type of Grow-Your-Own record.	There is one list window for managing all form records.
searching	The list window provides complete searching capability to find the records of interest. Search Builder can find contacts based on their Grow-Your-Own records.	The list window has very limited searching since the only common fields to all forms are the contact and the type of form. Search Builder does not (yet) support forms.
create a new one	Click New in the contacts list. Click New in the list window for the particular type of Grow-Your-Own record.	Click New in the contacts list. Click New in the Forms window: it asks which type of form you want to create.
user-level controls	A user record can indicate whether the user is allowed to see, edit, and delete each type of record.	A user record can indicate whether the user is allowed to see, edit, and delete forms. This is an all-or-nothing restriction: you cannot specify that a user is allowed to work with only particular types of forms.

Issue	*Grow-Your-Own*	*Forms*
usage controls	None.	Each type of form can indicate if only one of this type of form record is allowed per contact or if multiples are allowed per contact. Each type of form can indicate if the form can be saved even if only partially filled in (i.e. not all mandatory fields are completed).
connection to contact	Grow-Your-Own records may be connected to one or more contacts.	Form records must always be connected to a contact, and Sumac ensures this.
web interface	Grow-Your-Own records cannot be presented on your website.	Form records can be presented on your website.

Notes for the Sumac Administrator

You must define each form and its fields. Choose the Utilities/Customize Database/Lookup Lists command from the Sumac console. In the Areas list, click *Forms*. In the Lookup Lists list, click *Form Definitions*.

Click New to create a new form. This dialog appears:



Give the form a name, both singular and plural. This name appears in the user interface, both for Sumac itself and, if the form is available online, also in your website.

Choose a template if you want Sumac to automatically send an email to someone who fills out the form on your website. Then write a description for the form that will appear online. Finally, if you would like to restrict visibility of this particular form to certain users, you can select up to five user types who are able to see this particular form.

Click Add and Delete to specify the fields in the form. Note that the fields are defined the same way as fields in Grow-Your-Own records. Compared to Grow-Your-Own, these field attributes are not supported:

- panes in the editing dialog: form records are always presented in a single page
- search panel: you cannot specify that a field be searchable in the list window's search panel

These field-level attributes are not supported when the form is presented on your website:

- links to multiple contacts
- links to events, donations and payments
- formulas
- schemas

Long text fields can specify a maximum amount of text that can be entered into the field. This limit is enforced when the form is presented on your website.

Preview

When you are editing the definition of a form, click the Preview button to see a working version of the form that you can view and test.

Forms List Windows

When you click the Forms button, if your database defines several types of forms, you are asked to pick which type of form you want to show. The list window that appears shows only that type of form. You can choose any of its fields to be viewed as columns, and these selections are saved so they appear the next time you view this type of form.

You can search for forms based on any fields in the forms. When the form was defined by the Sumac Administrator, any fields specially marked for searching appear in the list of search types.

Funder Requests

Introduction

A contact may be a funder – one who accepts applications for money and gives or lends funds to other organizations. Examples of this include private family foundations, arts councils, and other government bodies.

Each funder may operate one or more funding programs. A funding program gives money to projects or organizations that meet certain criteria. Sumac lets you define funding programs including specifying these criteria and, often most importantly, specifying the steps that need to be completed to apply for funds under the program.

You may apply to a funding program more than once. Within Sumac, each such application is a funder request. You can list funder requests and track them through the application process.

Notes for the Sumac Administrator

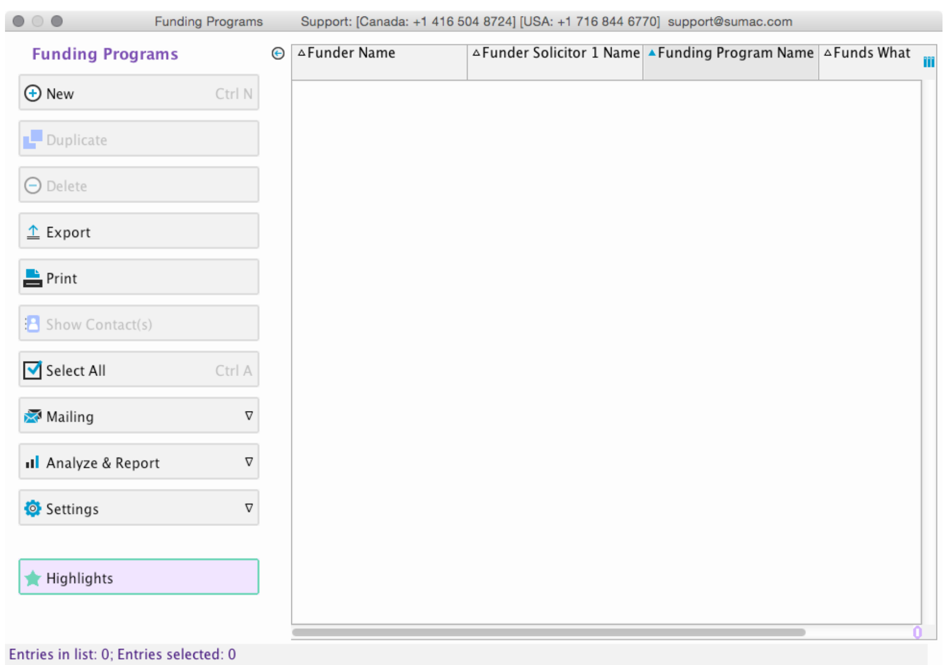
Field Preferences

Use the Utilities/Customize Database/Field Preferences command in the Sumac console to:

- re-label fields
- completely remove fields from the user interface
- make fields mandatory, or
- determine which fields should appear on a website.

in Funder Request records.

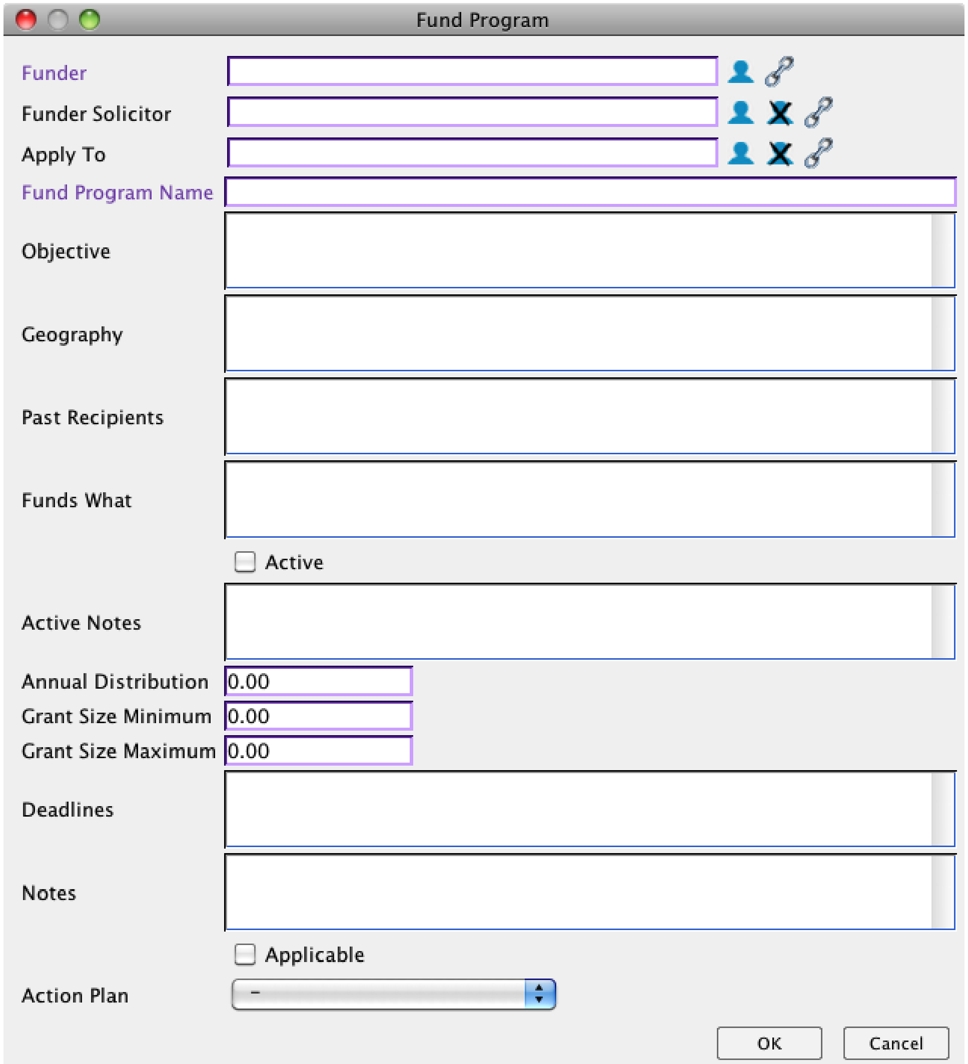
The Funding Programs List



This window can show a report listing donations by funders over many years.

Enter Funding Programs

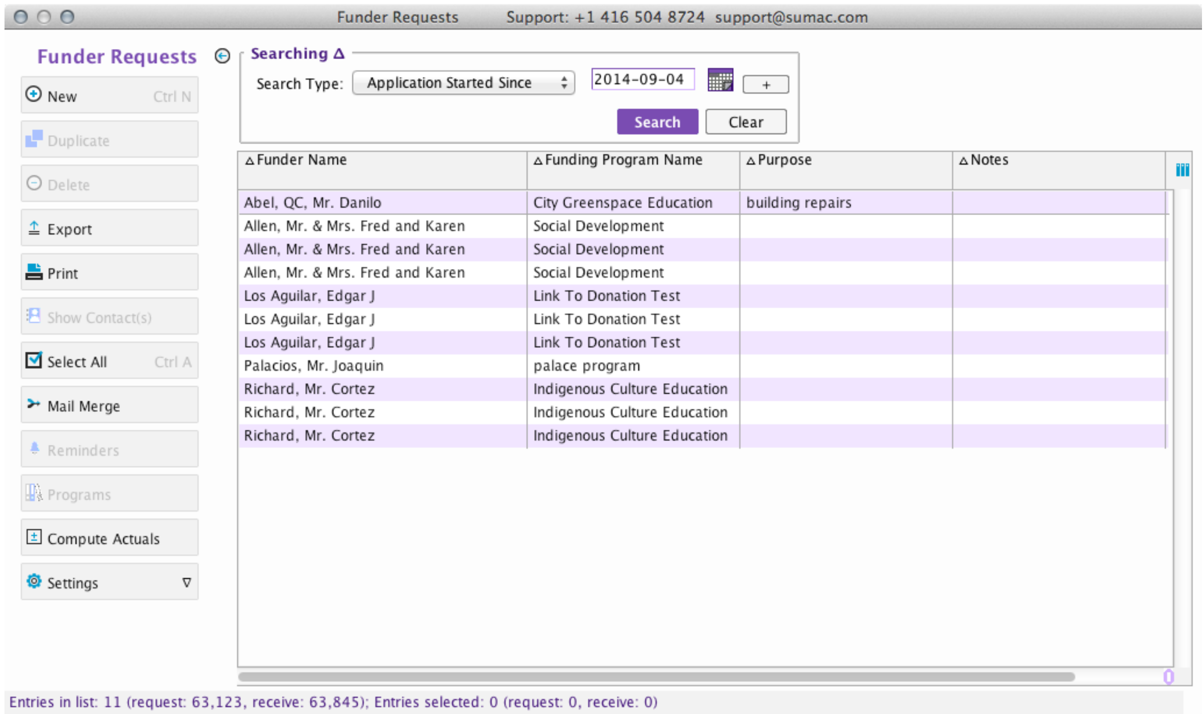
In the funding programs list, click the New button to get this dialog:



Enter whatever information you have about the funding program. Note that you can use link buttons to quickly view the details about the Funder, the Funder Solicitor (the person in your organization who deals with this funding program), and the Apply To contact at the funder organization.

One very important piece of information about a funding program is the sequence of steps that need to be followed to get funds from the funding program. You can set up these steps as an action plan, then use the Action Plan drop-down menu to relate the funding program to these steps. Whenever a funder request is started under a particular funding program, a reminder can be created to track the funder request using the action plan steps associated with the funding program.

The Funder Requests List



Note that the status bar at the bottom of the list of FUNDER REQUESTS list shows the total amounts requested and received for the entries showing in the list.

You can search to find FUNDER REQUESTS based on the application start date, the funder's name, or the status of the FUNDER REQUEST.

Compute Actuals Button

The Funder Request list can show the actual receipts and balance owed. However, it does not compute these figures until you click the Compute Actuals button.

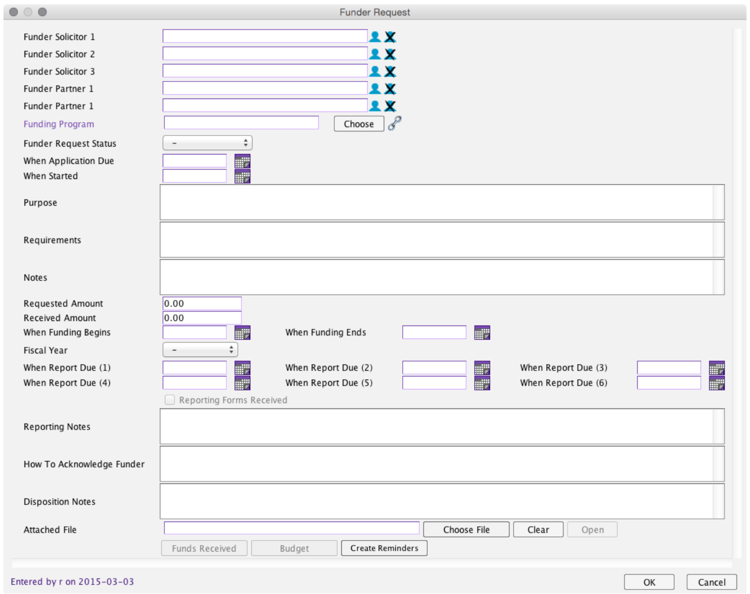
Optional Buttons

The Funder Requests list can have optional buttons:

Button	*Present if*	*What the button does:*
Reminders	The Sumac installation has the Reminders module and you are allowed to see REMINDERS.	Show REMINDERS for the funders in the selected FUNDER REQUESTS.
Programs	The Sumac installation has the Tour Booking module and you are allowed to see programs.	Show the programs that are receiving funding from the selected FUNDER REQUEST.

Enter Funder Requests

In the FUNDER REQUESTS list, click the New button to get this dialog:



Choose the FUNDING PROGRAM under which this FUNDER REQUEST is seeking funds. Enter other information as appropriate.

When you click OK to save the FUNDER REQUEST, if the FUNDING PROGRAM has an associated action plan, you are prompted to create a new REMINDER using that action plan.

If there is a file associated with this FUNDER REQUEST, then you can click to choose the file, linking it to the FUNDER REQUEST. For this to work well in a multi-user setting, the file should reside on a shared local or cloud-based file server.

Receipts

As you receive receipts (DONATIONS) related to a FUNDER REQUEST, you can link the DONATIONS to the FUNDER REQUEST. There are two ways to do this:

- From the DONATION: Enter the DONATION. At the bottom of the DONATION editing window, there is a drop-down menu that lets you link the DONATION to a FUNDER REQUEST.
- From the funder request: Click the Receipts button at the bottom of the FUNDER REQUEST editing window. This shows a list of the receipts (DONATIONS) connected to the FUNDER REQUEST. Click the New button to create a DONATION and automatically link it to the FUNDER REQUEST.

Budget

You can specify a budget for a funder request, indicating how you anticipate spending the funds received. As you spend the funds, you can also record expenditures under each budget line.

If your installation of Sumac has the Tour Booking module, you can connect create a new expenditure directly from within the program editing window: click the Funder Request Expenditures tab, then click New to allocate some of the costs of the program to a particular funder request.

Create Reminders

If you have specified one or more Report Due Dates, click this button to create reminders for them.

Grow Your Own

Introduction

Sumac has roots modules, common to every Sumac installation. It also has several optional specialized modules, which appear as additional buttons in the console. The Grow-Your-Own feature allows you to add a new module, *defined by you*, to Sumac. You can define what you want this module to do, how it should work, and what it should look.

Notes for the Sumac Administrator

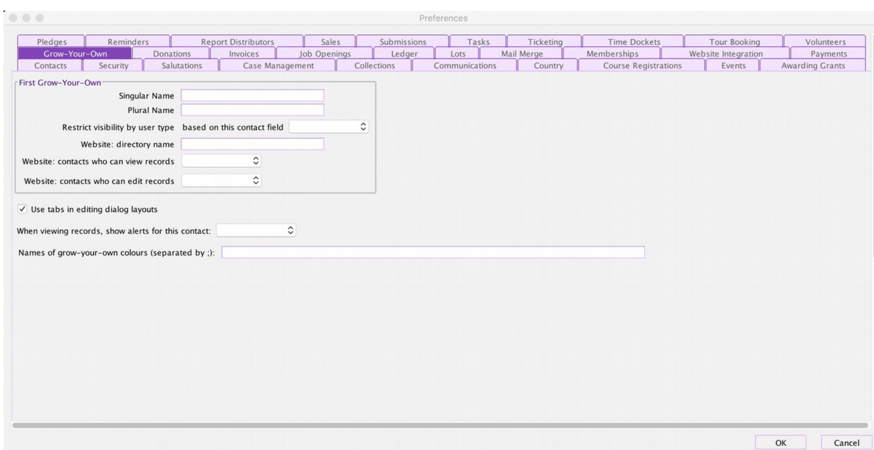
Here is a step-by-step approach to setting up a Grow-Your-Own module.

Step One – Plan the Objects' Fields

Decide what fields you need in the new Grow-Your-Own objects. If you have typically recorded these objects in a spreadsheet, the fields will probably correspond to the columns in the spreadsheet. As you plan, consider and document for each field:

- the type of data in the field: number, text, date
- the name of the field: a label to appear in the dialog for editing the objects and in the title of the list column that shows the objects
- the entry order of the field: what order should fields appear in the dialog for editing the objects.

Step Two – Set up Preferences, Name the Objects



Use the Utilities/Customize Database/Preferences command in the Sumac console. Click to choose the Grow-Your-Own tab. Enter the name (singular and plural) of the objects being added to Sumac. Next, you can set a preference to have Sumac control which users can see a specific contact's GYO and Case Management records. Visibility is based on the type of user that is viewing the records and the user type assigned to the contact.

If you are defining two types of GYO records, and they can be linked to each other, indicate the nature of the relationships that are allowed.

If the GYO records will have many fields, you can divide them into different tabs. Click the checkbox if you want to use tabs in the GYO editing windows.

If you want Sumac to check for alerts in the contacts referred to by GYO records, choose from the drop-down menu to indicate which contact should be checked.

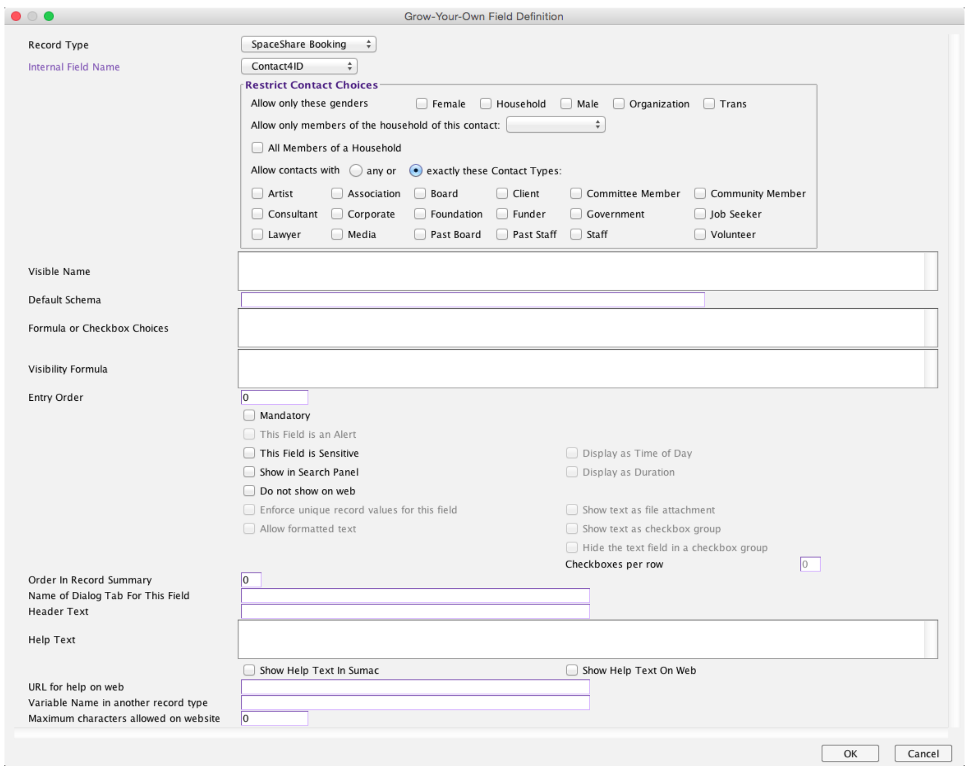
If you want to specify colours for your GYO records, enter the names of the colours separated by semi-colons. The names might be something like *Urgent;Regular;Whenever*. They should indicate the meaning of the colour, not just specify a colour name.

> Hint: The actual colours that are used are built in to Sumac. You cannot change them.

If the GYO records are going to be published as a directory on your website, you can give them a name for the website. In addition, you can specify which website users are allowed to view or edit the directory entries.

Step Three – Tell Sumac About the Fields

Choose the Utilities/Customize Database/Grow-Your-Own or Set up Case Management command in the Sumac console to show a list of the fields in the Grow-Your-Own objects. Click New to specify a new field in one of the Grow-Your-Own objects. Fill in this dialog:



Choose the Internal Field Name

The internal field name determines the data type that is stored into the field.

Type of Field	*Name in Set-up Dialog*	*Appearance in User Interface*
contact IDs	Contact1ID to Contact24ID	◆ a field that holds the chosen CONTACT'S name ◆ a button beside the field for choosing the CONTACT ◆ if the field is not mandatory, then also a button for clearing the field ◆ contact fields can restrict the choice of a contact by gender, contact type and also by household ◆ If you set *All members of a Household*, then when the user creates a new GYO record, he or she is prompted to choose a household, and Sumac then creates a new GYO record for each member of the household.
picture of a contact	PictureContact1	◆ in both the window for editing and entering the GYO record, and also in the list window, Sumac shows a small version of the picture from the contact record for the specified contact
dates	When1 to When80	◆ a date field that can be keyed into ◆ a button to display a calendar window for setting the date ◆ note: When1 is also displayed in the CONTACTS list when a CONTACT is expanded
amounts	Amount1 to Amount25	◆ a text field that must hold a number with decimals, typically a currency amount
events	Event1ID	◆ a drop-down menu of events
donations	Donation1	◆ a link to a donation record
colours	Colour1	◆ a drop-down menu of colour names
counts	Count1 to Count50	◆ a text field that must hold an integer
lookup list entries	Lookup1ID to Lookup28ID	◆ a drop-down menu of choices specifically for Grow-Your-Own objects ◆ add values to these drop-down menus using the Utilities/Customize Database/ Lookup Lists command in the Sumac console
long text	LongText1 to LongText31	◆ long text field with a scroll bar (hold up to 20,000 characters of data)

Type of Field	*Name in Set-up Dialog*	*Appearance in User Interface*
schema	Schema1 to Schema50	◆ schema fields are similar to lookup lists, except that they are multi-level or hierarchical: the values in the first level choice limit the values in the second level choice which, in turn, limit values in the third level choice. Schemas can have up to six levels of choices. ◆ define new schemas using the Utilities/ Customize Database/Lookup Lists command in the Sumac console ◆ add hierarchical values to a schema using the Utilities/Customize Database/Schema Entries command in the Sumac console
text	Text1 to Text30	◆ text field (Text1 is displayed in the CONTACTS list when a CONTACT is expanded)
flags	Flag1 to Flag30	◆ check box in the editing dialog
payment	Payment1 to Payment4	◆ a link to a payment record
membership	Membership1ID	◆ a link to a membership record
campaign	Campaign1ID	◆ a link to a campaign

Indicate the Name of the Field

Give the field a descriptive name. It will be used to label the field in the entry dialog and also as a column title in the list dialog. It can be very long if you need it to provide detailed instructions for website users filling in a form.

Default Schema

If the internal field name indicates that a schema is being used, and you want users to be prompted to enter a value from a specific schema, then enter the name of the desired schema in this field.

Specify A Formula

Formulas are used to specify additional information for providing a value for a field:

Numeric field	You can specify a formula for calculating the value of a field based on the values of other fields. Formulas can be simple math or use functions like Excel spreadsheet formulas. Details of formulas are specified in *Appendix A – Formulas* on page 506. The variables that are allowed in Grow-Your-Own formulas are the Internal Field Names chosen when defining the fields. Formulas can use these variables: ◆ Count1 to Count34 ◆ Amount1 to Amount25 ◆ When1 to When16 Here is an example: If Count1 is the number of days of a rental, and Count2 is the number of staff needed to support the rental, and a rental day costs $500 and a staff person costs $200 per day, this formula: `count1 * 500 + count1 * count2 * 200` gives the total cost.
Contact field	A formula assigned to a contact field should calculate the ID of the contact whom you want to assign to the field.

Date Field	Formulas can be used to specify an initial value. For example, the formula:
	`now(0)`
	specifies today's date, and this formula:
	`now(7)`
	is one week into the future.

Payment Field	The formula is used to calculate a suggested value for a payment record.
Schema Field	The formula should be the name of a schema, and will be used as the suggested schema for a user-entered value.
Text or LongText Field	If a text field or long text field is being presented as a group of checkboxes, then enter the labels (separated by semi-colons) for the checkboxes in the formula.
Lookup Lists	The formula must calculate the ID of the lookup list entry desired.

Checkbox Choices

If you define a text or long text field to hold checkbox choices, then you specify the checkbox text in the field that would otherwise hold a formula. Enter the checkbox choices separated by semi-colons. Note that checkbox choices are not allowed to contain commas.

Visibility Formula

If you specify a visibility formula, it is used to determine whether the field should be visible in the window for editing a GYO record. As a user makes choices with checkboxes and drop-down menus, and enters values into other fields, Sumac evaluates each visibility formula. If it evaluates to zero, then the corresponding field is hidden; any value other than zero causes the field to be displayed. If you would like to see a complete description of formulas and how they work in Sumac, see page 506.

Alerts

You can define a field a GYO record to be used as an alert. This works the same as the alert field in a contact record: when a person double clicks to view the record, the alert message is displayed first. Click *This Field is an Alert* on a text field or a long text field to indicate it should be treated as an alert.

Hint: Sumac will display only one alert message for a GYO record.

Display Count Fields as Time of Day

Count fields are normally entered as simple integers. But you can tell that a count field holds a time of day. In this case, the user can enter regular clock times, but the numbers that are put into count fields are calculated as the number of milliseconds past midnight, relative to GMT.

Display Count Fields as Duration

Count fields in GYO records can be shown as durations. Durations are displayed as a number of hours and minutes: 1.5 hours would show as 1:30. They are stored as a number of seconds: 1.5 hours would be stored as the number 5400.

Allow Formatted Text

Regular long text fields hold plain text. If you click this checkbox then the fields are allowed to contain formatted (html) text.

Do not display on web

If the list of GYO records is going to be displayed as a directory on your web-site, you can click this checkbox to prevent this particular field from going to the website.

Enforce unique record values for this field

If the field is a count field (a number) or a text field that you are using to hold a file number, case number, or similar unique identifier, click this checkbox and Sumac ensures that values entered into this field will be unique.

Hint: Sumac assigns a unique ID number to every GYO record, so you may not need to create one of your own.

Show Text as File Attachment

If you turn on this checkbox, then the field is used to hold the path to a file. This option is only available with text fields. When editing the GYO record, there are buttons to choose and open the file.

Show Text as Checkbox Group

A text or long text field in a GYO record can be entered using checkboxes. This standardizes spelling and choices. The available checkboxes are defined in the Formula field (see above), separated by semi-colons (;).

If you are displaying and entering a text field as a checkbox group, the labels on the user-selected checkboxes are put into the text field, separated by commas. By default, Sumac shows the text field, but you can hide it by clicking *Hide the text field in a checkbox group*. Also, by default, Sumac shows six checkboxes per row, but you can alter this too, by entering into the field *Checkboxes per row* the number of checkboxes you want.

Specify the Entry Order of the Field

Enter a positive integer to indicate the order that the field should appear in the entry dialog. Note that these numbers do not need to be sequential. It is often convenient to enter them 5 or 10 apart so that if you later need to insert a field between two others, you just enter a number between the two rather than having to re-sequence all the fields.

Indicate Which Fields Are Mandatory

Click the check box to indicate that a field must be given a value. This prevents a user from entering records that have no data in the specified mandatory field.

Indicate Which Fields Are Searchable

The list that shows Grow-Your-Own records has a search panel at the top. It provides the ability to search any field in the GYO records. Each field you wish to search is chosen from a drop-down menu.

If there are some fields you frequently search for (perhaps a contact or date field) then click *Shows in Search Pane* to cause a field to be separately identified in the list of searchable fields.

Indicate Fields To Be Used in Record Summaries

Sumac shows textual descriptions – summaries – of Grow-Your-Own objects when, in the contacts list, your click to expand a contact. You can indicate which fields of the objects should be displayed in the summary, and the order in which these fields should be presented.

Specify Pane To Hold The Field

The fields in GYO records can be divided among different panes. This enables you to present a more organized dialog for GYO records that have large numbers of fields. To use this feature, you need to specify the name of a pane to hold each of the fields in the GYO records. You also need to activate this feature using a checkbox on the Grow-Your-Own tab of the Utilities/Customize Database/Preferences dialog in the Sumac console.

> Hint: When a user is editing a GYO record, if a tab has data in it, the name of the tab will be preceded by an asterisk.

Provide a Heading

If a particular field is the first in a group of several related fields, then you can tell Sumac to put a heading immediately above the field when the field is presented in the window for editing the GYO records.

URL for Help on Web

If this field will be used in a form on your website, you can specify a link to additional information that helps people fill in the field. Put the URL in this field.

Variable Name in another record type

If fields in this GYO record can be copied to another type of record, this field tells Sumac where to put each GYO field. This field contains the variable name (mail merge code) of the field in the destination record.

At present, the only use for this field is when a form presented on your website is used to define a new contact record.

Maximum characters allowed on website

If the field is a LongText field, then you can limit how many characters a user is allowed to enter when the field is presented on your website.

Restart Sumac

After defining all the fields in the Grow-Your-Own objects, you must quit Sumac and start it again. This enables it to configure the user interface of the new objects.

Step Four – Give Users the Ability to Use the New Objects

Use the Utilities/Sumac Administration/Users command in the Sumac console to edit the capabilities of each user. Specify whether each user should be able to View, Edit, or Delete the Grow-Your-Own objects.

Step Five – Specify Values in the Lookup Lists

If any of the fields in the Grow-Your-Own objects come from lookup lists, then use the Utilities/Customize Database/Lookup Lists command in the Sumac console to specify the possible values in the lookup lists.

Appearance in the Sumac Console List

The new objects that you add to Sumac appear like another button in the Sumac Console. Clicking the button for this new object, shows a list of the objects. At the top of the window is searching, as specified in the field set up. At the bottom are the standard Sumac list buttons.

Appearance in the Contacts List

In the CONTACTS list, when a user clicks to expand a CONTACT, the Grow-Your-Own objects are displayed along with other data, indented under the expanded CONTACT. A Grow-Your-Own object is displayed if any of its CONTACT ID fields contain the ID of the CONTACT being expanded.

If the definition of the fields did not indicate which fields should be displayed, then these fields from the Grow-Your-Own object are displayed:

- the second contact in the grow-your-own record
- the first date field (When1)
- the first text field (Text1).

Linking Grow-Your-Own Records

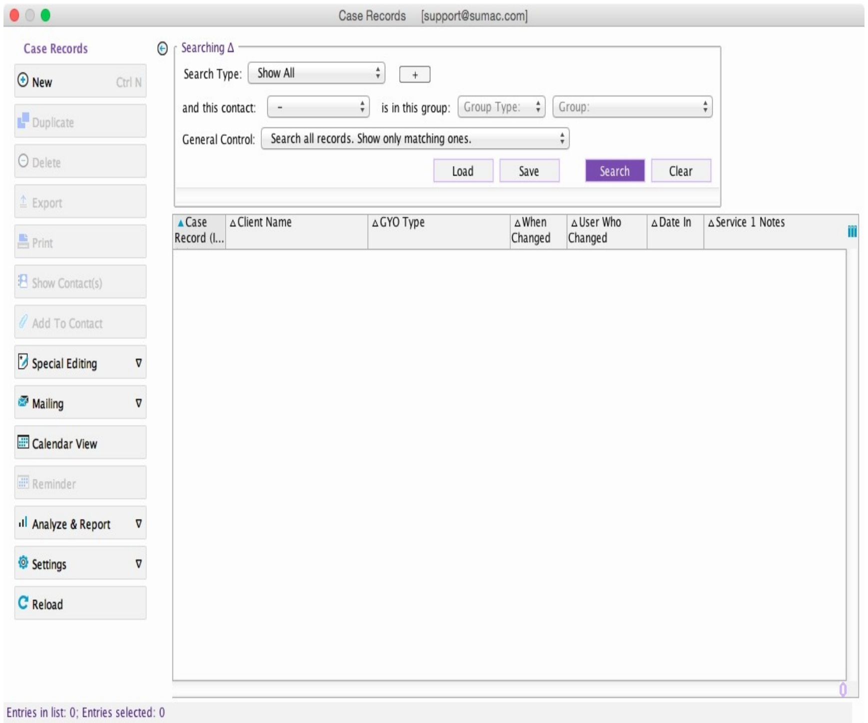
You can have more than one type of Grow-Your-Own record defined in your Sumac database. In this situation, you can link them together. Links are established by dragging and dropping objects. You drag child records from their window and drop them onto parent records in their window.

Grow-Your-Own and Web Integration

Records created through the Grow-Your-Own module are available to be displayed on your website. Refer to *Appendix B – Online Transactions* on page 529, and use the directories package.

Grow-Your-Own List

Your Sumac Administrator may have used the Grow-Your-Own feature of Sumac to create a customized Sumac module. If so, this module has features similar to other modules in Sumac. Its list window appears when you click its button in the Sumac console, and may look something like this:



The Reload button works the same as the Reload button in the Contacts list: it reloads all contacts from the database. This is convenient if Sumac users spend long amounts of time working just within a Grow-Your-Own list.

Searching

At the top of the list window, you can specify searches. Sumac provides two generic search criteria – one that searches on fields in the Grow-Your-Own records, and one that finds Grow-Your-Own records whose contacts are identified by a group (see *Search Builder* on page 485 for information about how to create groups). Depending on how your Sumac Administrator configured the Grow-Your-Own module, there may be other search criteria.

The General Control allows you to specify which records Sumac should search, and what to do with the results. For details see *The General Control* on page 87. However, GYO records have some slightly different searching capabilities from other list windows which are described below:

Search Type	*Description*
Show All	Show *all* records of the type being displayed in the window

Search Type	*Description*
Parent-child Relations	You can search to find records with one of these parentages: *Show neither parents nor children*: records that are neither the parent of another record nor the child of another record *Show parents and children*: records that are either the parent of another record or the child of another record (or both a parent and a child) *Show parents, not children*: show records that are the parent of another record but not the child of another record *Show children, not parents*: show records that are the child of another record but not the parent of another record
[GYO] Field	Choose this option to see a drop-down menu of all fields in your GYO records. You can then choose which field you want to search and specify search terms.
Event ID	Search records for those that refer to a particular event.
Event Group	Search records for those that refer to events in a particular event group.
Event Date	Search records for those that refer to events occurring in a date range.
[fields]	If there are fields in the GYO records that are searched frequently, then your Sumac administrator can mark them as searchable. This makes them appear in the Search Type menu. Hint: All fields that can be searched are available in the *[GYO] Field* search criterion (described above). But you can save time by having them appear directly in the Search Type menu.

Create New Record

As with other Sumac lists, clicking the New button creates a new grow-your-own record. If you click to select a record in the list, then the New button is relabeled to New/Duplicate; when you click it, you are given the option of creating a new record like the selected one.

In addition, you can create several Grow-Your-Own records at once by selecting several contacts in the contacts list, click Add To Contact then choose the Grow-Your-Own record.

When you are editing a single Grow-Your-Own record, it may contact a Duplicate Last button to duplicate the last record that you edited.

Linking Records

If your installation of Sumac allows two or more different types of Grow-Your-Own (GYO) records, then it is possible to make some records children of others.

Parent-Child Relations

The links or connections between two GYO records are hierarchical, in the sense that if two records are linked, one is the parent and the other is a child. If one type of record can have children of another type of record, the list windows that display the parent records have expansion icons that can be clicked to expand the parent and show its children.

Create Links

Create a link by dragging the child object from its window and dropping it onto the parent object. So if you want parent record *Parent* to have three child records *Child1*, *Child2*, and *Child3*, drag and drop the three children (all at once or one at a time) and drop them onto record *Parent*. This would give you a list like this:

- Parent
  - Child1
  - Child2
  - Child3

Delete Links

To remove a child from its parent, expand the parent, click to select the child record, then click Remove Child.

Notes in Links

When you link one GYO record to another, you are prompted to enter a note about the link. The note shows when you display the children of a GYO record: the note for each child is displayed with the child information.

If you need to edit the note on a link, click it, and revise it.

Re-Order Children

If you want the child records to be in a particular order, expand the parent, click to select a child record, then click the Move Up or Move Down button to re-position the child within its parent.

Bi-Directional Links

Maybe when you make one record a child of another, you want the links to be bi-directional, so that the child links back to the parent.

Here is an example. If one type of record describes concerts and the other type of record describes pieces of music, the concert may have pieces of music as children, indicating that the concert consisted of the child pieces of music. But if you make the links bi-directional, then whenever a piece of music is added as a child to a concert, the reverse link is created too. This ensures that the children of a piece of music will be all the concerts where the music was played.

Navigating Links

View Children

If you are viewing a list of GYO list windows than can have children, there is View Children command to open a new list window showing the children of the selected record(s).

View Parents

If you are viewing the details of a single GYO record, and that record may be the child of another GYO record, there is a link icon in the window. Click the link icon to see the parent(s) of the record you are currently viewing.

Print a Record

You can print a list of GYO records in the same way that you print contact records, or communication records, by clicking print in the list window. Or, you can print an individual record while you are viewing it by clicking print at the bottom of the record window. This option produces an HTML printable output.

Export

Export information from a GYO in the same way you export from any record list window. The only difference is the *Export Checkbox Groups as column headers* checkbox. Set this checkbox if you want Sumac to include each checkbox in a group as a separate column. This can be used for reporting and statistical purposes when analyzing data.

Grow-Your-Own and Tasks

You can integrate tasks with Grow-Your-Own records, connecting one or more tasks to each GYO record. The list of GYO records has a Task button that lets you create a task for a selected GYO record. In addition, when you click to expand a GYO record, it shows related tasks in addition to other GYO records related to the one being expanded.

Invoices

Introduction

The Invoices area of Sumac is used to keep track of money owed to your organization. You may link the following records to an invoice:

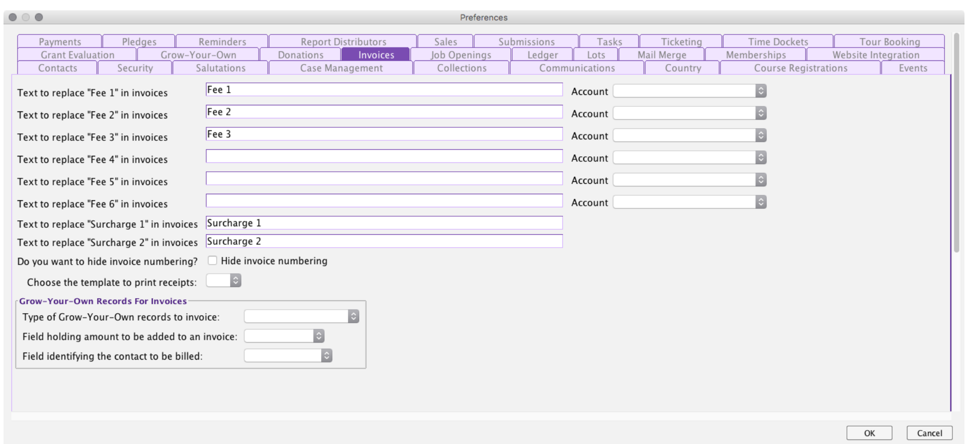
- Course registration
- Donations
- Grow-Your-Own records
- Memberships
- Pledges
- Sales
- Ticket orders
- Tour booking programs

This also allows you to link multiple charges to a single invoice for a contact who owes money for multiple items.

The invoices area also allows you to set up a payment schedule to receive recurring payments, perhaps monthly or quarterly, for the items billed in each invoice. This helps you to track how much a contact owes, as well as when you expect to receive the payment(s).

Notes for the Sumac Administrator

Use the Utilities/Customize Database/Preferences command in the Sumac console to get the Preferences dialog. Click the Invoices tab.



Fees and Surcharge Names

An invoice can have up to six distinct fee or charged amounts. They have default names *Fee 1*, *Fee 2*, and *Fee 3*. If your invoices have a standard set of fees – perhaps rental, staff, and refreshments – then enter these names for the fees so that fields in invoice records will be named appropriately.

Similarly, you can change the names of surcharges if they are always the same: e.g. shipping, sales tax, value added tax.

Every invoice saved to your database has a unique database ID record number. If, however, you want to set your own invoice numbers, independently of the database ID, then Sumac supports this. It shows the assigned invoice numbers in a special field, and can calculate the next one for you. If, however, you do not need this feature, you can click a preference check box to hide it.

Print Receipt

The window showing a list of invoices has a Print Receipt command. This command works by doing a mail merge operation on the receipt, then printing the resulting file. This can only work if you specify a template for it to use.

Choose the receipt template from the drop-down menu in this tab.

Default Billing Contact

If your invoices are often issued to a generic contact in your database, you can set that generic contact in this field. Sumac then uses this contact as the default person for invoices, but still allows you to change it in the invoice record if the invoice is being issued to someone else.

Accrual Accounting

Sumac supports an Invoices Receivable account, which is used to generate ledger entries for partially paid invoices providing full support for accrual accounting. Specify the account by using Utilities/Customize Database/Preferences/Invoices.

Invoices List

Receive Payment Button

Invoices allow you to set up a payment schedule to receive recurring payments, perhaps monthly or quarterly. If some invoices are set up in this way, you can click to select them, then click the Receive Payment button. Sumac creates payment records, and replaces the corresponding expected payment record in each invoice. If the payment record is for a credit card, then Sumac automatically processes the credit card.

Invoicing Grow-Your-Own Records

If you have Grow-Your-Own records that should be invoiced, then you can configure them here. You must tell Sumac which type of Grow-Your-Own records are invoiceable, which field holds the amount to be invoiced, and which field holds the contact to be invoiced.

Create and Show Invoices from Other Lists

The following list windows have direct integration with invoices:

- course registrations
- donations
- memberships
- payments and payment batches
- pledges
- sales
- ticket orders
- tour booking programs

These list windows have an Invoices group of commands which contains these commands:

Create Invoice

This button creates one or more invoices from the records that are selected in the list.

Show Invoice(s)

This button shows the invoice associated with records in the list – all records or just the selected ones.

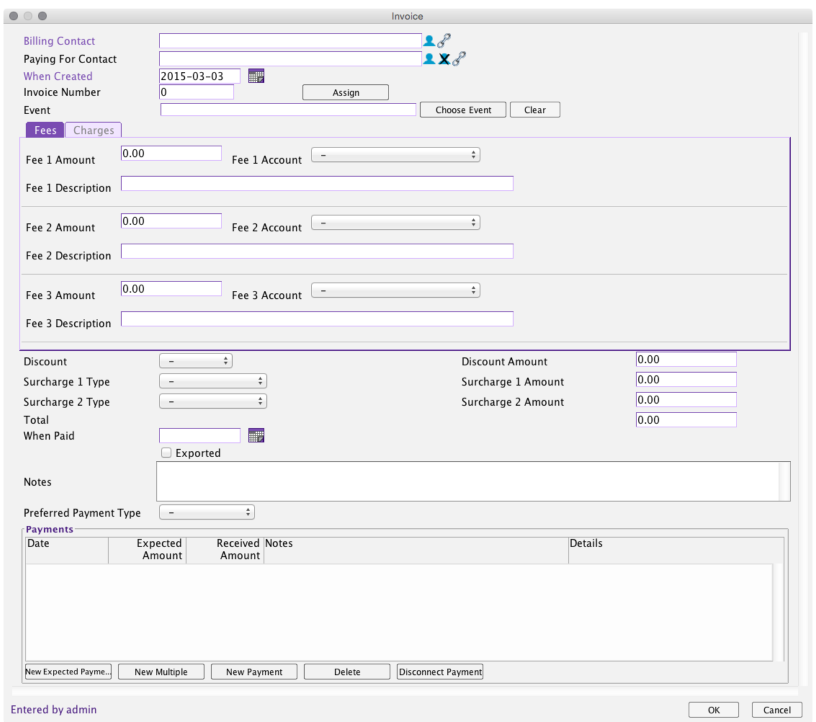
Ticket Order Invoices

When an invoice is created from a ticket order, the currency amounts in the ticket order are put into the invoice currency amount fields as follows:

Invoice Amount	*Ticket Order Amount*
Fee 1	tickets and subscriptions
Fee 2	donation entered with the ticket order
Fee 3	adjustments
Surcharge 1	first surcharge or tax
Surcharge 2	all surcharges or taxes except the first

Enter Invoices

The dialog for entering an invoice looks like this. Note that the terms Fee 1, Fee 2, Fee 3, Surcharge 1, and Surcharge 2 can be changed using preferences.



The *Billing Contact* is the one paying the bill. The Billing Contact may be paying for an invoice incurred by the *Paying For Contact*.

Fees

You can have up to six distinct fee fields. Use Utilities/Customize Database/ Preferences/Invoices to name additional ones, and they automatically appear in the user interface.

Beside each fee description is a drop-down menu that can hold standardized fee descriptions. Before you are able to use this menu, you are required to define entries in the lookup list. These can be entered by clicking Utilities/Customize Database/Lookup Lists/Area: Invoices/Lookup List: Fee Descriptions.

Charges

Items in your database that entail payments can be added to an invoice. The invoice can then be used to record expected payments and actual payments. The Charges tab has these buttons:

Link Existing Charge Button

Click Link Existing Charge to see this window, which lets you search for and find a particular record to add to your database.

New Charge Button

Click New Charge to add a new chargeable record to your database and also to the invoice.

Remove Charge Button

Click to select a charge, then click Remove Charge to remove it from the invoice.

Payments

> Hint: The list of payment information records is always sorted chronologically.

The list of payments contains entries of two types:

- *expected payments*, which indicate when a payment is expected and how much it should be
- *payments*, which indicate a payment amount that was received for this invoice

As with any list in Sumac, you can double click to edit any entry in the list. You use the buttons under the list of payments to add and remove entries from the list:

New Expected Payment Button

Create a new expected payment record.

New Multiple Button

Create several expected payment records. Sumac suggests a currency amount which spreads the total amount owed evenly over the payments; e.g. if the total of the invoice is $100, and you specify five payments, then Sumac proposes $20.00 as the amount of each expected payment.

New Payment

Create a new payment record.

Delete

Delete the selected expected payment or payment record.

Connect Payment

If a payment was entered into Sumac and that payment record should be associated with this invoice, then click this button, and enter the ID of the payment. The payment will be added to this invoice.

Disconnect Payment

Select a payment in the list. Click this button to disconnect the payment from the invoice without deleting it from the database.

Job Openings

Introduction

The JOB OPENINGS module allows you to specify attributes of JOB OPENINGS, and automatically identify contacts who can fill a job. It also expedites the communication activity for dealing with employers.

Notes for the Sumac Administrator

Use the Utilities/Customize Database/Preferences command in the Sumac console to get the Preferences dialog. Click the Job Openings tab.

To use the Job Openings module, you must create a contact type that indicates that a particular CONTACT is looking for a job. Then use this preferences tab to tell Sumac which contact type indicates a job seeker.

The Job Openings module can automatically send emails about candidates to potential employers. When it does this it can also record the COMMUNICATION that occurred. Indicate the communication type that should be used for this type of COMMUNICATION record.

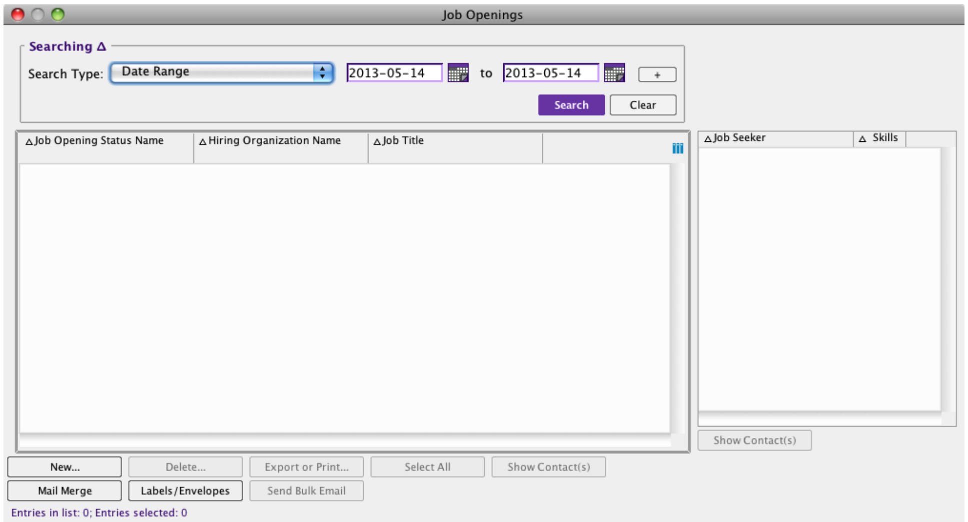
Getting Ready to Use Job Openings

Before using the job openings module, there are several preparatory steps to take:

- ✔ Define a contact type which indicates that a contact of this type is looking for a job. In the system preferences, tell Sumac which contact type is to be used for this purpose.
- ✔ Define the skills that will be used to match JOB OPENINGS to candidates. In most situations it does not work well if you define hundreds of skills, since only extremely precise matches can then be found, and close matches are not identified. Similarly, if you define too few skills, then inappropriate matches might be found. Usually it is best to start with a small number of skills and gradually add to the list as required.
- ✔ Enter appropriate values in Utilities/Customize Database/Lookup Lists/ Area: Job Openings for industries and pay time frames. These are used as drop down menus in a JOB OPENING record to help describe the job. An administrative user can also add new entries to these lists by clicking *New* at the bottom of either list as it shows in the record.
- ✔ Normally COMMUNICATION records relate to a single CONTACT. If you are using the JOB OPENINGS module, it is often useful to be able to enter multiple CONTACTS in a single COMMUNICATION record: one for the employer, one for the candidate. Use the system preferences to indicate that there should be two CONTACTS per COMMUNICATION record.
- ✔ For each job candidate:
  - Put candidate resumes and covering letters on a server, and add them to the candidate's CONTACT record (Facts tab, create External Document facts). Give them sufficiently descriptive names that you will be able to choose the correct one when sending them to potential employers.
  - In the job candidate's CONTACT record, click the contact type that indicates that the person is seeking a job.
  - Specify the CONTACT's skills in the CONTACT record (Facts tab, create Qualification facts). This enables Sumac to identify CONTACTS who have the skills for a particular job opening.

The Job Openings List

Click the Job Openings button, in the Sumac Console, to see the job openings list. The main scrolling list shows JOB OPENINGS. Job seekers are listed on the right; these are people that have a particular contact type which means they are looking for a job.



Match Job Openings to Job Seekers

If you click to select a JOB OPENING, Sumac immediately matches the skills required by the job opening with the skills of the job seekers. It uses colour to indicate which job seekers have the appropriate skills:

	Is the Job Seeker qualified for the Job Opening?
Green	The CONTACT has all the necessary skills.
Orange	The CONTACT has some of the skills needed for this JOB OPENING.
Red	The CONTACT does not have any of the skills needed for this JOB OPENING.

You can click the Skills column title to sort the most qualified job seekers to the top of the list.

Buttons

Show Contact(s) Button

Click to select a JOB OPENING in the scrolling list. Then click Show Contact(s) to see the details about one of the CONTACTS related to the JOB OPENING. If more than one CONTACT is identified by the selected records, then this button brings the CONTACTS list to the front and shows the selected CONTACTS.

Mail Merge Button

For further information, see *Mail Merge* on page 479.

Labels/Envelopes Button

For further information, see *Labels, Envelopes, and Name Tags* on page 469.

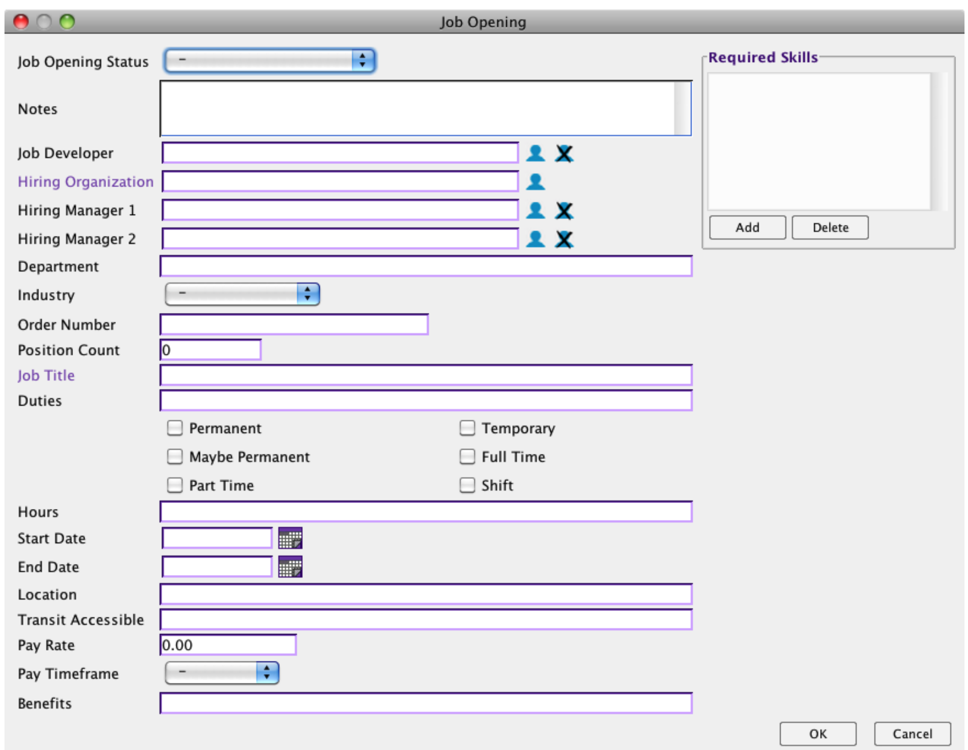
Send Bulk Email

If you wish to send an email to a hiring manager, attaching documents about one or more job candidates, then:

- ✔ Click to select the JOB OPENING.
- ✔ Click to select one or more candidates.
- ✔ Click the Send Bulk Email button
- ✔ You are asked to choose documents from the list of External Documents for each candidate. These chosen documents will be attached to the email.
- ✔ Sumac then presents a dialog describing the email it is about to send. The Sender field is filled in with the default sender email address. The subject line for the email is set to the names of the selected job candidates. The content of the email message just identifies the documents being sent; customize this with an appropriate message. When you click OK, Sumac proceeds to send the email.

Enter Job Openings

When you click the New button to create a new JOB OPENING, this window appears:



Fill in the details of the JOB OPENING. Use the Add and Delete buttons to specify the skills required to do this job.

Ledger Entries

Introduction

The purpose of ledger entries is ultimately to produce a general-ledger (G/L) style report of debits and credits that can be entered into your accounting software.

As Sumac users perform financially significant transactions – receive a donation, sell some tickets, renew a membership – Sumac automatically breaks the components of the transactions into debits and credits and saves these into ledger entries.

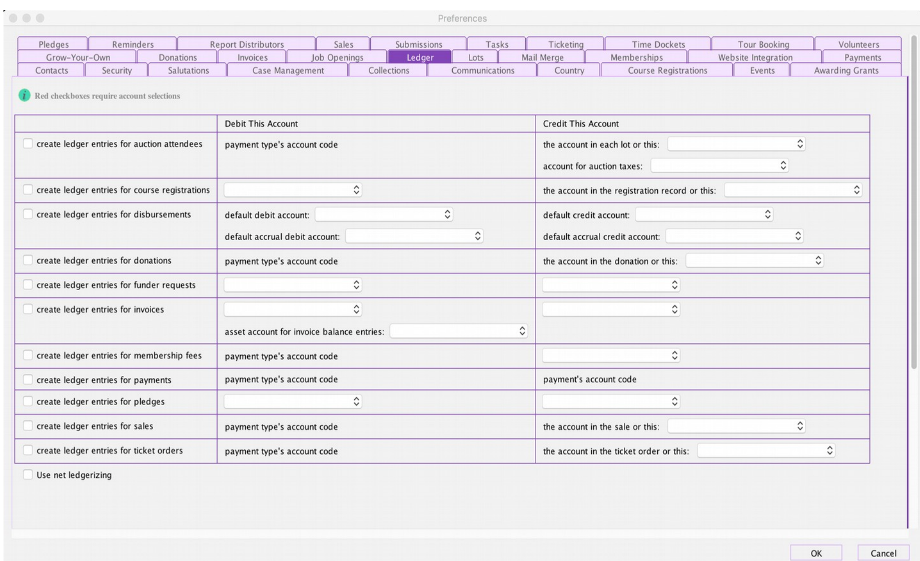
This approach separates accounting functions from other operational functions. It makes financial information available in a ledger format that is comfortable for bookkeeping and accounting staff, but does not require everyone using Sumac to become a bookkeeper.

The ledger entries themselves can be viewed in a Ledger Entries list, just like any other list of records in Sumac. Reports let you see the transactions and send them to your accounting system.

Notes for the Sumac Administrator

Preferences

You need to tell Sumac which types of transactions should be entered in the ledger. Use the Utilities/Customize Database/Preferences command in the Sumac console, then click the Ledger tab.



This allows you to click checkboxes indicating which types of transactions should be put into the ledger, and also specify some account information indicating how transactions should be added to the ledger.

Net-Ledgerizing

If the net-ledgerizing preference is on when a financial transaction (e.g. donation or membership) is edited, Sumac creates ledger entries that record the difference between what the old transaction created and what the new one requires. This enables you to keep Sumac ledger entries synchronized with ledger entries in your accounting system. Without this feature enabled, when a record that creates ledger entries is edited (e.g. a donation, an invoice), Sumac deletes all the ledger entries that relate to that record, then creates new ones.

Lookup Lists

You need to specify account codes, usually corresponding to accounts in the Chart of Accounts in your bookkeeping system. The ledger entries ultimately are summarized in a debit-credit format based on account codes, so the account codes being used need to be defined before ledger entries can work correctly.

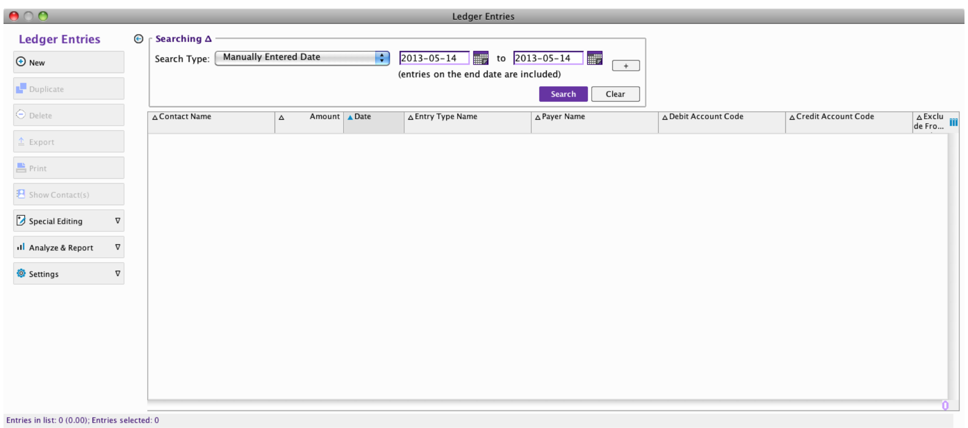
You also need to ensure that each payment type is linked to the appropriate account, since most receipts debit the payment type's account code.

You also need to ensure that each surcharge (tax) is linked to the appropriate account, since surcharge amounts credit the surcharge's account code.

You also need to associate account codes with the various items that you want entered using different account numbers. For example, if you want donations to a campaign to be entered against a different account, you need to put that account code in the record that defines the campaign.

In order to ensure that Sumac users remember to specify an account code where you require one, several tabs in the Preferences dialog allow you to indicate that in certain types of records the account code is a mandatory field.

The Ledger Entries List



Analyze & Report

There are some report available using the Analyze & Report menu. Note that, before you choose which report should be produced, you must search to find the ledger entries you want in the report.

Contact Imbalances

Show all debits and credits summarized by contact. This helps you track down and resolve imbalances in the ledger entries.

Account Summary

Choose this produce a report that summarizes ledger entries by account.

Simply (Sage 50) Accounting

This report shows ledger entries in a format appropriate for importing into Simply Accounting. Note that in this report ledger entries for payments are given special treatment:

If a payment pays for a transaction that is also in the list of ledger entries (e.g. a product sale, a ticket order), then the payment is included as part of that transaction, rather than treated as a separate Simply Accounting transaction all by itself.

How Transactions Are Added to the Ledger

This section describes how different types of transactions are added to the ledger.

General Comment About Time Stamps

As ledger entries are added to the database, they are stamped with the time and date when they were entered. The date comes from the computer that is creating the entry, but the time stamp comes from the server.

Auction Attendees

Debit	*Credit*
[payments are ledgerized as described below]	If a purchased lot, specifies an account, then the amount paid for the lot is credited to that account. If no account is specified, then the amount is credited to the default account identified in Utilities/Customize Database/ Preferences/Ledger. If the auction attendee record indicates any taxes were paid, they are credited to the account identified in Utilities/Customize Database/Preferences/ Ledger.

Course Registrations

Course registrations typically result in several credit entries.

Debit	*Credit*
	The fee plus the promotional amount is credited to the account in the registration itself or, if no account is specified in the registration, to the credit account specified in the Preferences dialog.
	The cost (the non-tax amount) of each supplementary item is credited to the account associated with the supplementary item (defined in the definition of the session) or, if no account is specified there, to the credit account specified in the Preferences dialog. Note that if a supplementary is a product with an account, then the credit entry goes to the product's account.
	For each supplementary item: add its surcharges (taxes) to the account specified in the definition of the surcharge.

Disbursements

If both a debit and credit account are present, Sumac creates ledger entries for the Total of the disbursement. Similarly, if both an accrual debit and accrual credit account are present, Sumac creates ledger entries for the Total of the disbursement.

Donations

All Scenarios:

If a donation is made in conjunction with a sale or ticket order, and the sale or ticket order will in turn be ledgerized, then the amount of the donation is not debited. This prevents double counting on the debit side, since the payment for the sale or ticket order will be ledgerized and it includes the total amount of the donation.

Scenario 1: part of donation is allocated to another contact using a soft credit and it is paying for a pledge by the other contact

Debit	*Credit*
Debit the payment type's account.	For the portion of the donation that is being allocated to a pledge, credit the account that is specified in the Preferences dialog for *debiting* pledges, typically a "pledges receivable" account.
	if part of the donation is *not* being allocated to a pledge, then credit this non-pledge amount to the account for this donation or for donation default account as specified in the Preferences dialog.

Scenario 2: donation is paying for a pledge

Debit	*Credit*
Debit the payment type's account.	If the donation is to a fund that specifies accounts, or the donation itself references an account, then credit that account. Otherwise, credit the account that is specified in the Preferences dialog for *debiting* pledges, typically a "pledges receivable" account.

Scenario 3: the donation is being received as a result of a successful funder request (it is linked to the funder request)

Debit	*Credit*
Debit the payment type's account.	Credit the account that is specified in the Preferences dialog for *debiting* funder requests.

Scenario 4: donation specifies a fund, and the fund allocates to multiple accounts

Debit	*Credit*
Debit the payment type's account.	Credit the account(s) identified by the fund, in the proportions that the fund indicates.

Scenario 5: no special circumstances, and the donation specifies an account

Debit	*Credit*
Debit the payment type's account.	Credit the account specified in the donation itself.

Funder Requests

Debit	*Credit*
The amount to be received for the funder request is debited to the account identified in the Preferences dialog.	The amount to be received for the funder request is credited to the account identified in the Preferences dialog.

Invoices

Hint: The Sumac administrator must specify default accounts for both debits and credits before Sumac will add invoice fees to the ledger.

Debit	*Credit*
Payments in the invoice are debited appropriately.	Items like donations or memberships that are listed in the *Charges* tab of an invoice are independently ledgerized so no further ledgerization is performed on them.
	Amounts in the *Fees* tab of the invoice, and its discounts and taxes, are ledgerized to the applicable accounts.

Memberships

Information in a membership record is not debited: Sumac assumes there will be a payment record which will create the debit entries.

The membership record only creates credit entries if its Payment Date has been set.

Debit	*Credit*
The amount of the payment is debited to the account associated with the payment type chosen in the payment record.	If a surcharge (tax) specifies its own account, credit that account for the surcharge amount.
	The sum of the membership fee and taxes which do not specify their own account is credited to the account identified in the Preferences dialog.

Payments

Debit	*Credit*
The amount of the payment is debited to the account associated with the payment type chosen in the payment record.	The amount of the payment is credited to the account chosen in the payment record itself.

Pledges

Here is how Sumac decides the transaction date for a pledge's ledger entry:

- If the pledge has a pledge commitment date, then use it.
- If there is no pledge commitment date, then use the date when the pledge was entered into the database.

Debit	*Credit*
The total amount of the pledge is debited to the account identified in the Preferences dialog – typically a pledges receivable account.	The total amount of the pledge is credited to the account identified in the pledge (an income account) or, if none is present, then to the account in the preferences dialog.

Sales

> Hint: You *must* specify a default credit account in the Preferences. Otherwise Sumac will not create ledger entries for sales.

The payment accounts are debited.

Credits are applied to accounts associated with each product, possibly splitting the price of each product to multiple accounts, depending on the definition of the product.

Discounts are debited separately if the discount has its own account, or included with the price of the product if not. If the discount has an account code, then the amount of the discount is debited along with the full price of the product (credited). However, if the discount does *not* have an account code, then the discount amount is *not* debited and the net (discounted) price of the product is put in the ledger (credited).

Ticket Orders

When crediting amounts associated with a ticket order, Sumac first figures out a default credit account to use. This is either:

- The account specified in the ticket order, or
- If there isn't an account in the ticket order, then use the default account specified in the Preferences dialog.

Note that all components of the pricing have the ability to specify their own account, thereby overriding the default credit account.

Debit	*Credit*
Debit the payment type's account.	For each ticket or subscription sold, credit the account for that ticket's event or the subscription package's account.
	Credit each discount to the discount's account.
	Credit each surcharge (tax) to its account.
	Credit any overall adjustment to the default credit account

Lots

Introduction

Sumac can manage lots – merchandise or services that are being sold via auction.

Notes for the Sumac Administrator

Field Preferences

Use the Utilities/Customize Database/Field Preferences command in the Sumac console to:

- re-label fields
- completely remove fields from the user interface
- make fields mandatory, or
- determine which fields should appear on a website.

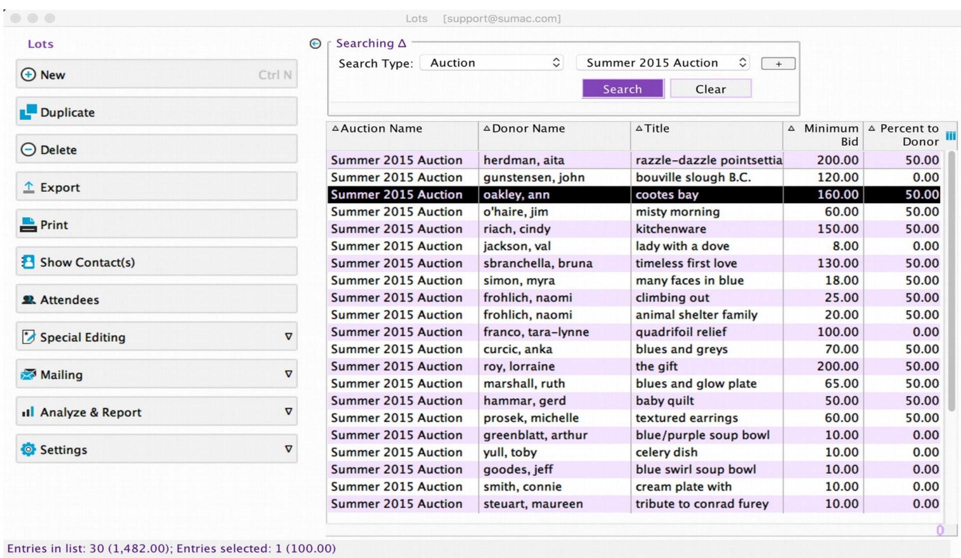
in Lots.

Additional Fields

Use the Utilities/Customize Database/Field Preferences command to rename and use several optional additional fields:

- up to four additional amount (with decimal places) fields
- up to four additional check box fields
- up to four additional count fields

The Lots List



Searching

If you search by donor, artist, or buyer name, Sumac finds lots where the donor's, artist's, or buyer's last name starts with the specified characters. So searching for *smi* finds *Smith* and *Smiley* but not *Psmith*.

If you search by the title of a lot, Sumac finds lots whose titles contain the specified text. So searching for *sun* finds *Setting Sun* and *Sunrise Over the Mountains*.

Buttons

Show Contact(s) Button

Click to select a LOT, then click this button. Sumac shows the details of the CONTACT record for the LOT. If more than one CONTACT is identified by the selected records, then this button brings the CONTACTS list to the front and shows the selected CONTACTS.

Mail Merge Button

You can produce one or more new documents – e.g. a personalized letter, invitation, renewal notice, or receipt – by merging data from the database, with a document template file that you have previously created (see *Create Document Templates* on page 499). For details on how to do merge operations, see *Mail Merge* on page 479.

Labels/Envelopes Button

Print labels or envelopes for the CONTACTS identified by the selected LOTS. See *Labels, Envelopes, and Name Tags* on page 469.

Make Donations Button

A LOT can indicate that a portion of the sold price is to be treated as a DONATION from the donor of the LOT. Once the selling price has been determined, you can use this button to automatically create DONATION records from selected LOTS.

When you click this button, you are presented with a DONATION in which you specify the details (e.g. event, date) of the DONATIONS that are to be recorded.

If you have your donation preference set to *allow donations with all zero currency amounts*, then Sumac presents a dialog asking which donations to make receipts for.

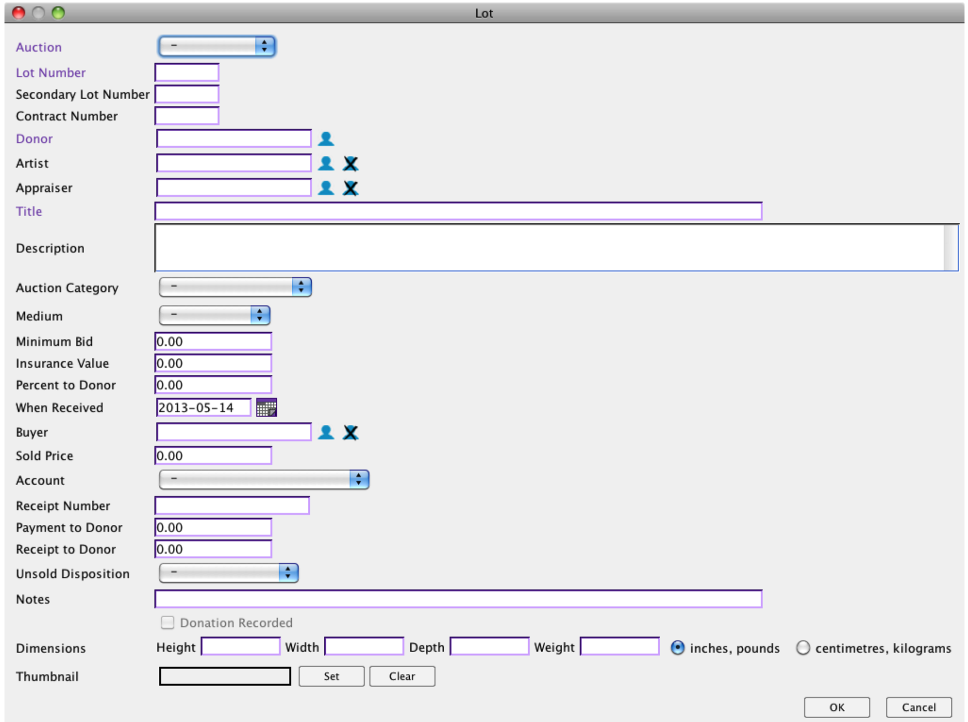
Attendees Button

This button shows a list of people (bidders) attending an auction, and the lots which they have acquired in the auction. For details about how to use the Attendees list, see *Attendees List* on page 255.

Enter Lots

Creating a New Lot

When you click the New button in the lots list, this dialog appears:



Choose which auction this lot belongs to. Depending on which auction it is, Sumac may allow you to enter a lot number, or it may automatically assign a Lot Number to the lot when you save it to the database.

The Donor is a mandatory field. Depending on the auction, when you specify a donor, the Artist may be set to the same contact.

Enter a Title for the lot. The Description field is optional but may be useful in generating bid lists or an auction catalog.

Enter Percent to Donor as the portion of the selling price that goes to the donor. For example, if the donor gets 30% of the selling price, and your organization gets the remaining 70%, then you enter *30* in this field. Later, when you enter the Sold Price, Sumac automatically calculates the Payment to Donor and the Receipt to Donor fields, based on Percent to Donor and Sold Price.

The thumbnail is a small picture (up to 120 pixels square). When you click Set, you are prompted for an image file (jpg or gif). Sumac automatically resizes it if it exceeds the maximum allowed dimensions. This picture can be used in Mail Merge operations so, for example, you can include the picture in automatically generated bid sheets.

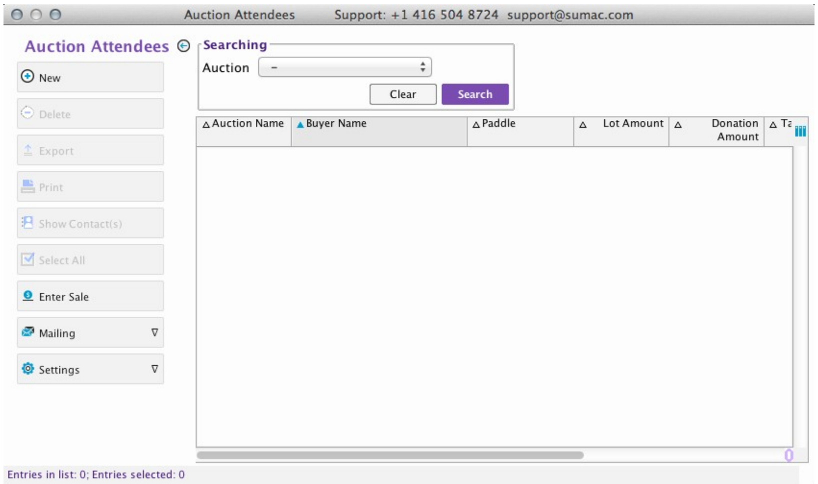
Creating a New Lot Like and Existing Lot

If you want to create a lot that is quite similar to an existing one (e.g. same donor, same auction, same Percent to Donor), you can save time as follows:

- ✔ Before you click the New button in the lots list, click to select a lot similar to the one you are about to create.
- ✔ Click the New button.
- ✔ Sumac asks if you want to create a lot like the selected one. If you click Yes, then the new lot dialog has several fields already filled in for you.

Attendees List

The auction attendees list lets you record people attending an auction, accumulate the lots that they purchase, and process payments. The appearance of the list is similar to other Sumac list windows, and the buttons do the same things:

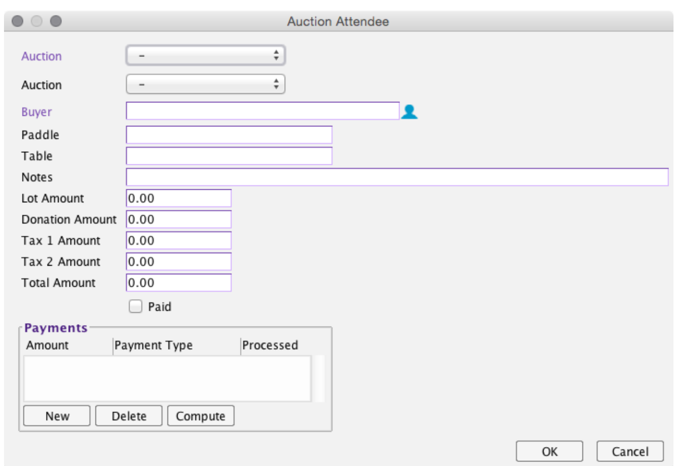


When a bidder has won some lots, they are listed under his or her Auction Attendee record.

The following sections explain how to use this list.

Check In

When a bidder comes in, you should create a new Auction Attendee record for the bidder. The record looks like this:



Indicate the auction. If you are having two auctions at once (e.g. a live auction and a silent auction) choose both of them in the drop-down menus.

Identify the buyer. If there is a live auction with assigned paddles, then record the bidder's paddle number as you hand it to him or her. If buyers are assigned to tables in the auction room, then enter the buyer's table number too.

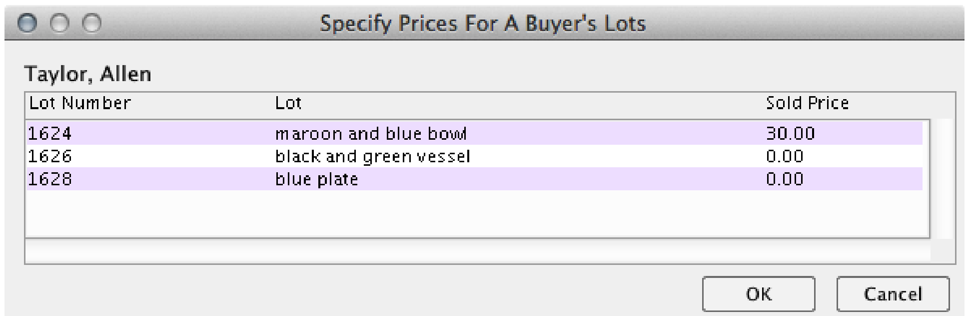
It is often useful to obtain and record credit card information as the bidders arrive, rather than during the crush at the end of the auction. Click the New button to create a payment record, and enter details of how the auction attendee intends to pay.

During the Auction

Record Sold Lots by Dragging

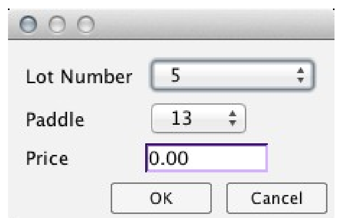
As lots are won by different bidders, you need to relate a lot to a bidder. You do this by dragging the lot from the Lots list window and dropping it on the bidder's Auction Attendee record. This updates the lot record, recording its buyer, and thereby adds the lot to the list of those won by the bidder. This also updates the Auction Attendee record, adding the purchase price of the lot to both its Lot Amount and its Total Amount.

When you drag one or more lots from the lots list and drop them onto a bidder, this window appears so you can enter the Sold Price for each lot:



Record Sold Lots by Paddle

Click the Enter Sale button to get this dialog:



Choose the lot number that identifies the lot that was sold. Choose the paddle to identify the buyer. Then specify the price for which the lot was sold. When you click OK, Sumac assigns the lot to the buyer and updates both the lot and the buyer's information.

Check Out

At the end of the evening, you can check out bidders, optionally asking for an additional donation, and collecting on their credit cards. Here are the steps:

- ✔ Find the bidder's Auction Attendee record in the list. Expand it to see the lots that the bidder has won. Confirm with the bidder that the list is correct.
- ✔ Double click it to see the Auction Attendee record details.
- ✔ Ask the bidder if he wants make an additional donation. If so, enter it in the Donation Amount field.
- ✔ Enter any tax amounts required.
- ✔ Click the Compute button. Sumac calculates the total of the lots, and also adds this, the taxes and the donation to calculate the Total Amount due from the bidder.
- ✔ Create or edit a payment record. Accept the payment. If it is being paid with a credit card, you can click to process the credit card immediately.

Memberships

Introduction

Each MEMBERSHIP record describes member information for one time period (typically a year) for one CONTACT. Create a new MEMBERSHIP record for each CONTACT when the CONTACT becomes a member or renews a previous MEMBERSHIP.

By recording each renewal separately instead of just keeping track of whether a member is current or not, you accumulate a rich source of information, useful for future CAMPAIGNS and MEMBERSHIP drives: who renewed and when, who changed MEMBERSHIP type, who did not renew.

MEMBERSHIP records are related to CONTACTS:

- Each MEMBERSHIP must identify the CONTACT who is a member.
- If a CONTACT is supposed to be in the automatically generated MEMBERSHIP directory, then there are additional fields in each CONTACT record to specify the way that CONTACT's information is to be presented in the directory. There is also a check box to indicate whether a CONTACT should be in the MEMBERSHIP directory, even if the CONTACT is not a current member.

Notes for the Sumac Administrator

Field Preferences

Use the Utilities/Customize Database/Field Preferences command in the Sumac console to:

- re-label fields
- enable extra contact fields for a membership
- remove fields from the user interface
- make fields mandatory, or
- determine which fields should appear on a website.

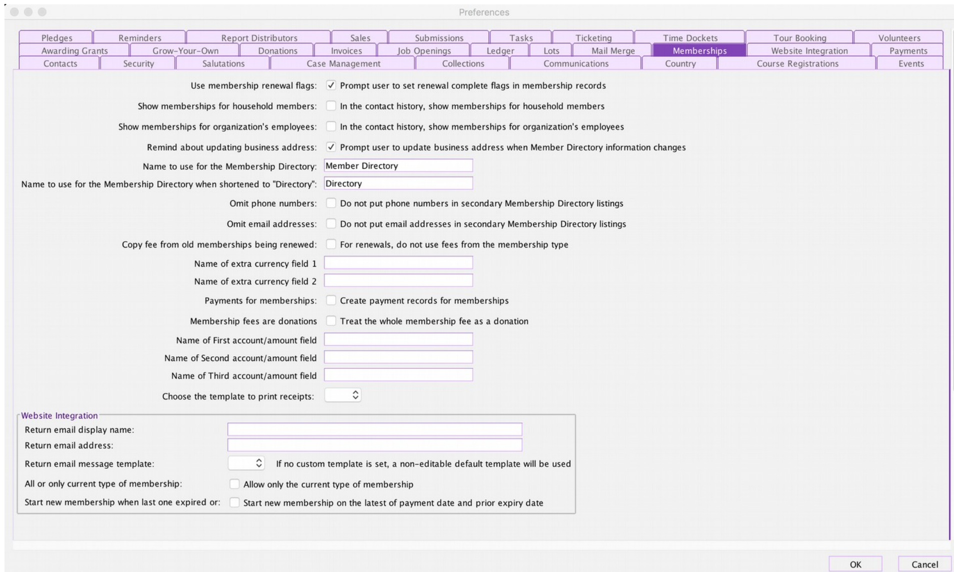
in Membership records.

Preferences

Use the Utilities/Customize Database/Preferences command in the Sumac console to get the Preferences dialog.

The Security tab lets you click a checkbox to tell Sumac to log whenever a user creates or edits a membership record.

Click the Memberships tab to see many other options applicable to memberships:



Membership Renewal Flags

Each MEMBERSHIP record has a Renewal Complete flag. Users can use this to help keep track of which MEMBERSHIP records have finished the renewal cycle and which have not.

When a user does mail merge, produces labels, or sends emails from the MEMBERSHIPS list, Sumac can prompt users, asking if they want the Renewal Complete flag to be set in the MEMBERSHIP records that were just processed. These prompts are optional, and whether they appear or not is controlled by this setting.

Membership Renewal Online

In the Preferences dialog, if you click the Website Integration tab, there is a check box that enables you to restrict renewals so that a renewing member is only allowed to renew using the same membership type that he or she already has.

Household Memberships

Tell Sumac to show the memberships of all household members in each member's contact history by setting this check box.

Organizational Memberships

Tell Sumac to show the organization's membership information in the contact history of all of their employees by setting this check box.

Remind If Directory Information Changes

In the Membership tab of a CONTACT record, there are fields that are emitted to the MEMBERSHIP directory if the CONTACT is a secondary listing in the directory. These fields contain data that may be replicated in the Business Address tab. If you click this option, then users are prompted to make sure the Business Address information is updated whenever one of the fields in the Membership tab is changed.

Membership Directory Name

If you use Sumac's membership directory feature to produce a directory with a well-established name, then enter that name. Sometimes, in the Sumac user interface (e.g. on a button to create the directory), that name has to be shortened, so you should also enter a short version of the name.

Omit Phone Numbers and Email Addresses

When Sumac generates a membership directory, if your directory template tells Sumac to include secondary contacts (i.e. information about contacts who are related to members), by default Sumac includes phone numbers and email addresses for the secondary listings. You can choose to omit phone numbers and email addresses.

For renewals, do not use fees from the membership type

This preference makes the fee in a renewed membership the same as the fee in the old membership, instead of taking the renewal fee from the membership type.

Extra Currency Fields

You can define up to two extra numeric fields in membership records. This enables you to track historical information (e.g. a member's budget size) in membership records.

Provide names for one or two extra fields, then restart Sumac. The fields appear in membership records.

Create Payment Records

Click this checkbox to tell Sumac to automatically prompt for a payment record whenever a new Membership record is created.

Treat the whole membership fee as a donation

Sumac can record a donation amount at the same time as you receive a membership fee. If you enter a new membership record with a fee of $50 and an optional donation of $25, Sumac would create a donation record for $25.

However, if you turn on this checkbox, you tell Sumac that you want both the $50 and the $25 to be treated as a donation, so the donation record would be for $75.

Rename Account Fields

Each membership record can allocate its fees to different accounts. You can give these fields names to help people remember what they are supposed to put into each one.

Print Receipts

Select the template you want Sumac to use when a user clicks the Print Receipt button in the membership list window.

Website Integration

If you allow your members to use your website to renew their membership, then there are some additional options that apply to online functionality:

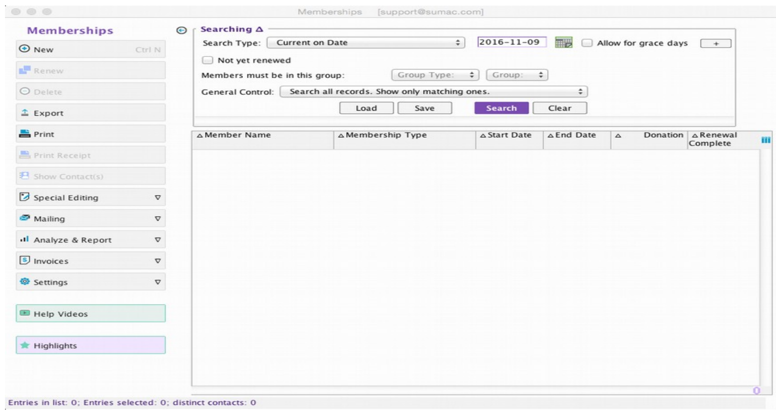
- The display name and email address to be used for emails sent to a member who renews online.
- The template to be used for the renewal email.
- Whether a renewing member should be restricted to only be able to renew with the same type of membership as he has already.

- Whether the renewed membership should start when the old one ended, or start on the date of the renewal.

Contact Preference Related to Memberships

The Contacts tab in the Preferences dialog has an option that relates to memberships: *Prompt user to set renewal date when a new membership is added*. If this option is chosen, when a user adds a new membership to the database the user is prompted to set the renewal date field in the member's contact record.

The Memberships List



In the list of memberships, entries that are current (i.e. have an end date after today) are displayed in black. memberships that have expired are displayed in grey.

When you click the expansion icon for a membership, you see all communications and donations received in the last six months from the contact identified by the membership.

Note that the status bar at the bottom of the window shows both the number of memberships being displayed, and also shows the number of distinct contacts.

Searching

Note that in addition to the Search Type options, listed in this table you can also search to find memberships that have not been renewed, and memberships for members that must be in a specific group. Groups are defined in the Contacts list using Search Builder (see page 485).

Search Criteria	*Usage*	*Applications*
Current on date	Find membership records that are current on a certain date.	You are having an annual meeting on June 15. Only members whose membership was current on May 15 are allowed to vote.
Current in date range	Find membership records that were current between two dates.	You want to know anyone who was a member at any time in 2014, so you can invite them to a special members event.

Search Criteria	*Usage*	*Applications*
Allow for grace days	Click if you want to find current MEMBERSHIPS and also allow for the number of grace days specified in their membership type records.	You want to do a mailing to current members. You allow for the grace period and send mail to some additional CONTACTS even though their MEMBERSHIPS may have expired.
Expiring in date range	Enter one or both dates. If you enter the first date, Sumac finds MEMBERSHIPS expiring on or after that date. If you enter the second date, Sumac finds MEMBERSHIPS expiring on or before that date.	Perhaps it is January, and time to send renewal letters to CONTACTS whose membership expires in March. Search to find MEMBERSHIPS expiring between March 1 and March 31.
Payment Type	Choose a specific payment type from the drop-down menu.	Find MEMBERSHIPS with the specified payment type.
Paid in date range	Enter one or both dates. Sumac finds MEMBERSHIPS that were paid in the specified date range.	You need to see which MEMBERSHIPS were paid in a particular time period. Enter the time period and click the Search button.
Member's last name	Enter the first few letters of a company name or an individual's last name.	Find MEMBERSHIP information for a particular named CONTACT.
Member's first name	Enter the first few letters of an individual's first name.	Find MEMBERSHIP information for a particular named CONTACT.
Membership Type	Choose, from a drop-down menu, the type of MEMBERSHIP.	Find MEMBERSHIP information for members of a particular type.
Receiving this benefit	Choose a particular MEMBERSHIP benefit from the drop-down menu to find all MEMBERSHIPS that receive that benefit.	Perhaps it is time to deliver that MEMBERSHIP benefit, and you want to know who is eligible to receive it. You probably would combine this search with a search for members whose MEMBERSHIP is current on a certain date.
Member Communication Preference	Find MEMBERSHIPS for CONTACTS who want to receive a particular type of COMMUNICATION.	If you are about to send out a particular type of COMMUNICATION to members, do this search to find the members that want to receive the chosen type of COMMUNICATION.

Search Criteria	*Usage*	*Applications*
Member Language	Find MEMBERSHIP records for CONTACTS whose primary language is specified as the particular chosen language.	You segment mailings to members by their language. You can find current MEMBERSHIP records by one language and click Mail Merge to generate the documents, then repeat the search for another language. Be careful because some CONTACT records may not have a language specified.
Renewal Status	Indicate if you want to find memberships that have or have not been renewed.	Find memberships expiring in a date range and combine that search with a renewal status of *Renewal not complete*. These are members that need to be reminded.
Show All	Show all membership records.	Show all memberships.
Not yet renewed	Indicate if you want to find membership records that have not yet been renewed.	Find memberships using other search criteria, then from the results remove those for a member who has a later-dated membership.

Buttons

Show Contact(s) Button

Click to select a MEMBERSHIP. Then click this button to see the details about the CONTACT for the selected MEMBERSHIP. If more than one CONTACT is identified by the selected records, then this button brings the CONTACTS list to the front and shows the selected CONTACTS.

Column Selection Icon Button

This button allows you to control which columns show in the list of MEMBERSHIP records. It works the same as other column selection icon buttons (see *Changing the Columns Showing in a List* on page 31).

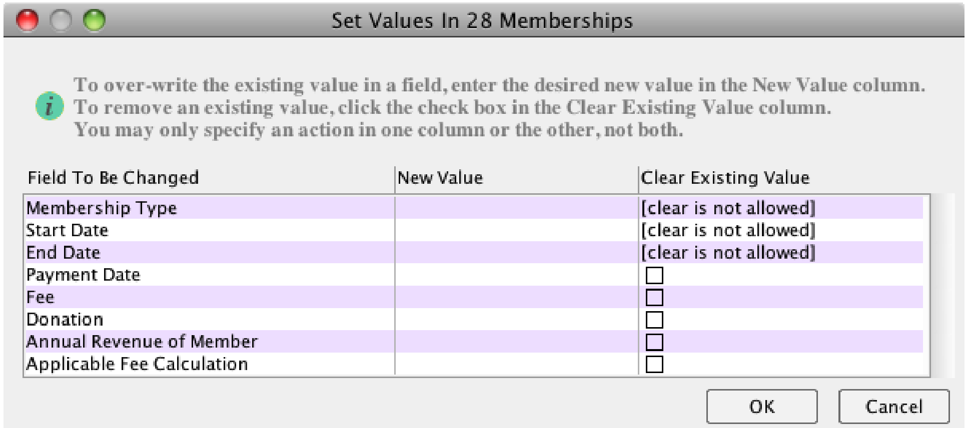
There is one special situation to note with columns in the MEMBERSHIPS list: You can show the member's organization name in the MEMBERSHIPS list, but the MEMBERSHIPS list gets this particular piece of information from the CONTACTS list, so organization names only show if the CONTACTS list is also showing organization names.

Bulk Edit Button

This button enables you to change values in several fields of several COMMUNICATIONS all at once.

Hint: Only users with bulk import capability can use this button.

When you click this button, there are warning dialogs that caution you to be very careful when setting values. Then this dialog appears:



Key in a new value for each field that you want to set. Click check boxes to indicate which fields are to be cleared (in contrast to being set to a new value).

When you click OK, the changes are made.

Mail Merge Button

For further information, see *Mail Merge With Memberships* on page 264.

At the end of the mail merge process you are asked if you wish to set the Renewal Complete flags for the selected membership records. If this Mail Merge completes the renewal process, click Yes to set the Renewal Complete flags.

Print Receipt Button

Click this button to print a receipt for a membership. When clicked, Sumac uses a template to automatically print the receipt. To specify the template to be used, go to Utilities/Customize Database/Field Preferences.

Labels/Envelopes Button

Each membership record has a Renewal Complete flag. These flags are also displayed in the membership list. These flags help you to track whether a membership record has been fully processed. Often the last step in membership renewal processing is to generate mailing labels or envelopes.

When producing labels or envelopes from the membership list, at the end of the process you are asked if you wish to set the Renewal Complete flags for the selected membership records. If this Mail Merge completes the renewal process, click Yes to set the Renewal Complete flags.

For further information, see *Labels, Envelopes, and Name Tags* on page 469.

Send Bulk Email Button

Use searching features to build a list of memberships for contacts to which you want to send email. Then click the Send Bulk Email button.

When you send email from the memberships list, you are prompted to indicate whether you want to send the email to only the members themselves, or whether you want to send to both the members and also to contacts who are related to the members. If you choose to send to contacts who are related to the members, then only related contacts whose contact records indicate a communication preferences of the type chosen in the search area of the membership list will be sent these emails.

After these membership-specific choices have been made, the email process proceeds as described in *Email* on page 400.

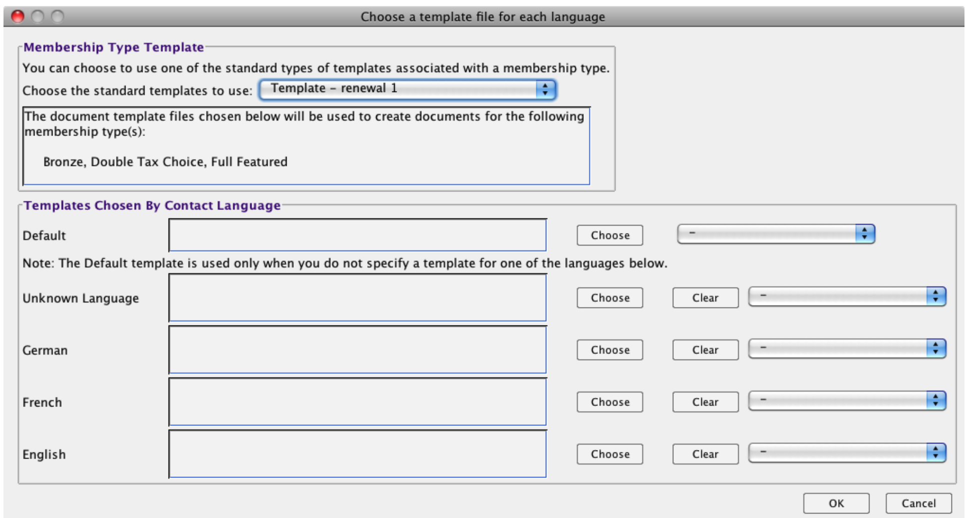
Membership Directory Button

For further information, see *Create A Membership Directory* on page 266.

Mail Merge With Memberships

Click the Mail Merge button to merge the information about listed or selected memberships with a document template, creating a new document to be printed or saved. For information on creating document templates, see *Create Document Templates* on page 499.

Each membership type can specify templates to use for various purposes. For example, each membership type may have a different thank-you letter for renewal. When you click the Mail Merge button, you are presented with the following dialog that lets you choose one of these membership type-dependent templates:



Choose from the drop-down menu to select the desired membership type-dependent template.

If the standard template is not available for all types of memberships for which a mail merge is being performed, or if you do not wish to choose a standard template from the drop-down menu, then the affected membership types (the ones for which you are generating documents and which have no chosen standard template) are identified. You can use the Choose Template File buttons to specify document template files to be used instead.

Once the necessary templates are identified, whether by using the drop-down menu or the Choose Template File buttons, click OK to cause the mail merge operation to proceed.

Enter Memberships

Enter Memberships In Contacts List

The Add To Contact button in the contacts list lets you add an identical membership record for many contacts at once.

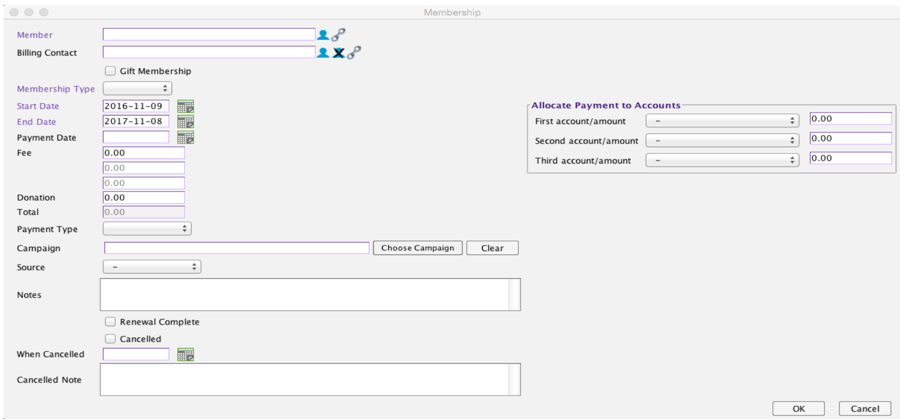
Create New Members, Renew Previous Members

If you are creating a membership record for a new member, click the New button. The dialog for a membership record appears.

If you are renewing a previous member, you can save a lot of time by clicking to select the old membership record for the contact, then clicking the Renew button. When you renew a membership, the dialog for a membership record appears with most of its fields already filled in, and with the dates advanced one year.

Specify Membership Details

Click the New button to get this dialog for entering a new membership:



You must specify the Member contact, Membership Type, Start Date, and End Date. When you choose a membership type, if the Fee field is empty then Sumac puts the standard fee for the selected membership type into the Fee field.

You can click a check box to indicate that the membership is a gift. Typically this means that the billing contact is making a gift to the member contact.

The fields that are immediately under the Fee field are for taxes or other surcharges. Depending on the type of membership chosen, a surcharge may be applied and the amount computed automatically; alternatively, you may need to choose an appropriate surcharge from a drop-down menu.

You can link the membership record to a campaign. This link helps to track campaign success. See *Campaigns* on page 138.

There is also a check box that indicates the renewal cycle processing has been completed for this particular membership. Click this check box when you have completed the renewal process for a membership record.

Finally, there is an area for cancellation of a membership at the bottom of the membership record. You are able to click a check box to cancel a membership, enter the date of cancellation and all notes below.

Enter a Donation as Part of a Membership

If the amount paid for the membership includes an extra amount for a donation, then enter the amount in the Donation field. You will note that the Total field is automatically updated as other values are entered. The Total field should indicate the full amount received.

On entering a membership entry that includes a donation amount, when you click OK to save the membership, the donation dialog appears, partially filled in. Finish filling it in, and click OK to cause a donation to be saved to the database (if you click Cancel, the donation is not saved). This enables the donation to be handled the same as other non-membership-related donations for receipting, reporting, and accounting purposes.

If a membership has a donation linked to it, then the window for editing the membership contains a link button which shows the donation.

Changing A Donation Which is Part of a Membership

If you discover that the amount of a DONATION entered as part of a MEMBERSHIP was incorrect, don't forget to change it in both the MEMBERSHIP record and in the DONATION record.

Allocate Payment to Accounts

You can allocate the non-DONATION portion of the payment to up to three accounts. Click to choose an account and enter the amount for that account.

Create A Membership Directory

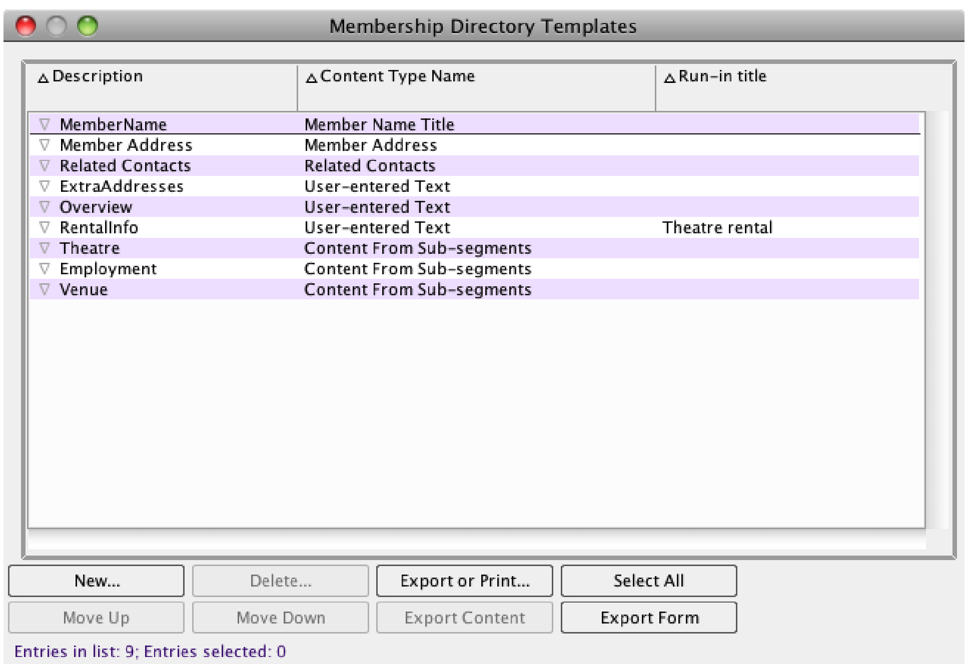
Membership Directory Contact Types

A membership directory is usually grouped by CONTACT types. The CONTACT types used for this purpose should have names that start with *md*. CONTACT types that start with *md* are displayed on the Membership tab of each CONTACT record. They also appear in a list of choices to be added to the membership directory.

Membership Directory Template

Before creating a membership directory, you need to create a template for the directory. A Membership Directory Template defines the lay-out of an entry for a single top-level entry in the directory.

In the MEMBERSHIPS list window, click the Directory Template button to get a list dialog like this:

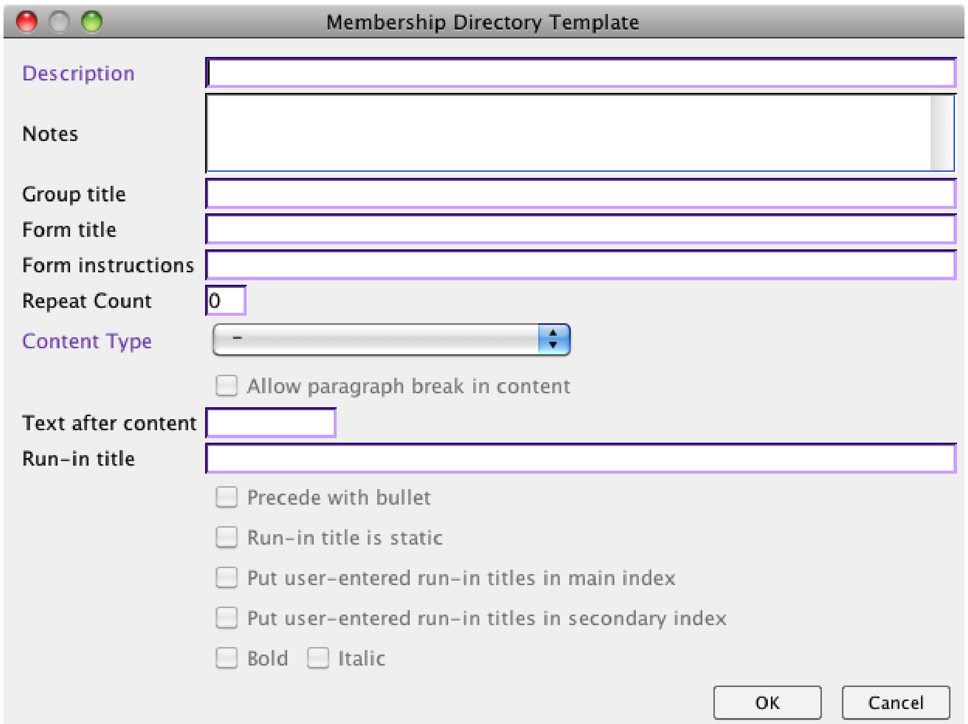


This list defines the template to be used for formatting entries in the membership directory. It also defines a form in which a user can enter additional information about each contact, to appear in the directory.

The Export Content button exports the content of directory children that you have expanded to show on the screen.

The Export Form button exports the entire membership directory form, and fills in the content for a selected contact. The *Form title* and *Form instructions* fields in the membership directory template enable you to make the exported form ready to send to your members so they can update it and return it to you for the next release of your membership directory.

Click the New button to add a new entry to the directory template. This window appears:



Field	*Description*
Description	This is used as a prompt when the user is entering information about a contact
Notes	Notes to yourself about the template entry.
Group title	If several entries in the template have the same group title, then the group title is emitted into the membership directory only once at the start of the group of entries.
Form title	The content of this field appears as the title of the field when you use the Export Form button (see above).
Form instructions	The content of this field appears as instructions for entering the field when you use the Export Form button (see above).
Repeat Count	If this entry can repeat, indicate how many times. Note that if you enter, say, 3, there will be a total of four occurrences of the entry.

Field	*Description*
Content Type	This drop-down menu lets you choose what type of content Sumac should put into the directory. ◆ Nothing (title only) ◆ Member Name Title: Insert the title for a member (the name plus whatever extra fields start with md) ◆ Member Address: Insert the address and phone information for a member. ◆ Related Contacts: Insert the list of related contacts. ◆ User-entered Text: The text for this entry comes from a user, entering information about a contact. ◆ Content From Sub-segments: The text for this entry comes from child entries.
Allow paragraph break in content	Most fields have just a few words of text. If the text can be very large (e.g. an extra mailing address), then this option enables the user to enter the text in a scrolling text field.
Text after content	If this text should be followed by something to separate it from the next piece of text (e.g. a space or a semi-colon followed by a space), enter the desired separator text here.
Run-in Title	If this piece of text should be preceded by a run-in title, enter the text of the title here.
Precede with bullet	If the run-in title should have a bullet in front of it, click this option.
Run-in title is static	If the run-in title is static (i.e. entered in the Run-in Title field), then click this. If the text is not static, then a user will be prompted to enter an appropriate run-in title
Index the user-entered run-in titles	If the user-entered run-in titles should be indexed, click this option.
Bold, Italic	The run-in title should be bold, italic, both, neither.

Directory Contents

Sumac can automatically export CONTACT information into a formatted word processing (rtf or docx) document that is a MEMBERSHIP directory. It is organized as follows:

Level 1: Member Type

Content: The names of the CONTACT types you chose to include at the time of creating the MEMBERSHIP directory. These are presented as titles.

Sorting: MEMBERSHIP types are presented in the order in which you choose them in the dialog where you are asked to specify the types to be included in the directory.

Level 2: State Where The Member Resides

Content: At the time of creating the MEMBERSHIP directory, you are given the option of breaking up each type of member – the level one headings – by state (province).

Sorting: By the state (province) field in the CONTACT records for the members.

Level 3: Detailed Entry for Individual Member

Content: Regular fields in CONTACT records. You specify which CONTACTS should be included in the directory: those with current MEMBERSHIPS, or those who have the Include In Directory check box set in their CONTACT records. The title of each detailed member entry consists of the name of the member. In addition, if there are extra fields of information in the CONTACT record for the member, and the name of the extra field starts with *md* (membership directory), then the value of these extra fields is appended to the title (ordered by the names of the extra fields). This allows you to show special fields (e.g. member classifications) in the directory.

Sorting: By CONTACT name.

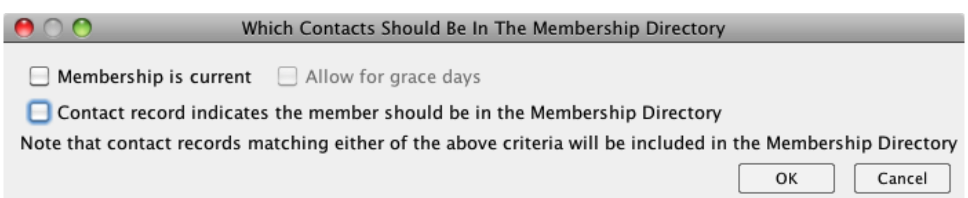
Level 4: Summary Entry for Relation of Individual Members

Content: These are abbreviated entries for CONTACTS related to members shown in the third level entry. The information in the fourth level entries comes from special MEMBERSHIP fields in CONTACT records. Every CONTACT record has data fields to be included in the MEMBERSHIP directory: title, phone and extension, and email address. When including related CONTACTS, Sumac considers only those that are related to the detailed member entry by a relation type whose description starts with the letters *md* (membership directory).

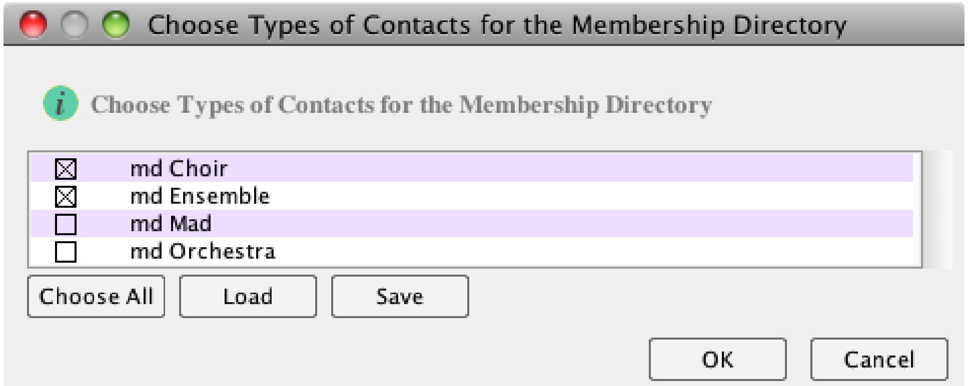
Sorting: Under the entry for each CONTACT in the MEMBERSHIP directory, Sumac places the names of CONTACTS related to the one being listed. It puts these related CONTACTS in order, in the MEMBERSHIP directory under each member, by sorting the names of the Relation Types. Because of this ordering, if you want related CONTACTS to be listed in a certain order, it is often best to start the names of Relation Types with *md* followed by a digit, e.g. md1Chairman, md2Board Member, md3Sales, md4Administration.

Creating The Directory

When you click the Membership Directory button in the MEMBERSHIPS list, you are presented with this dialog for deciding which CONTACTS to include in the directory:

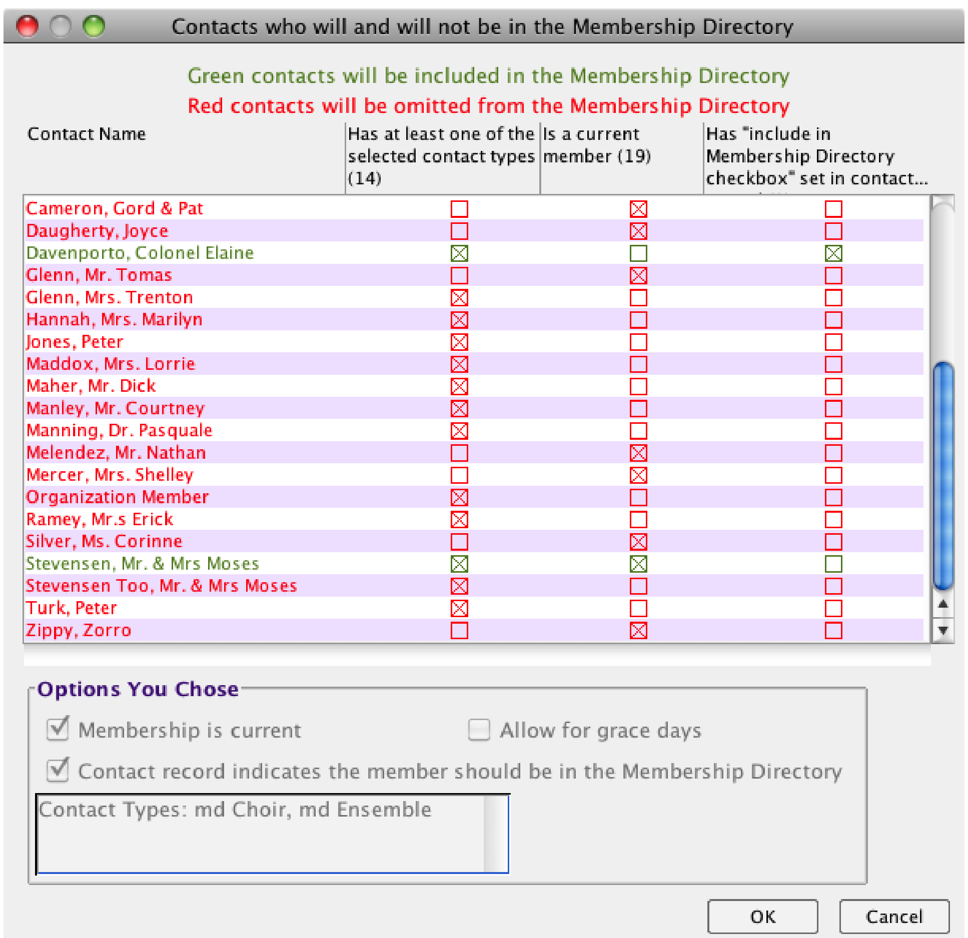


Make your selection and click OK. Then use the following dialog to choose the types of CONTACTS to be included in the directory:



Drag CONTACT types from the available list on the left, to the list of ones to be included in the directory on the right. Note that the MEMBERSHIP directory contains the CONTACTS in the order of CONTACT types that are specified in this dialog, so drag CONTACT types to put them in the desired order. For example, if your organization is an umbrella group whose members are performing musical groups, and the CONTACTS are different types of music groups, you may choose to list orchestras then ensembles then choirs as shown in the picture above.

Based on your choices in the preceding two dialogs, some CONTACTS will be included and some will be excluded from the directory. This dialog indicates who is in and who is out, and asks you to confirm.



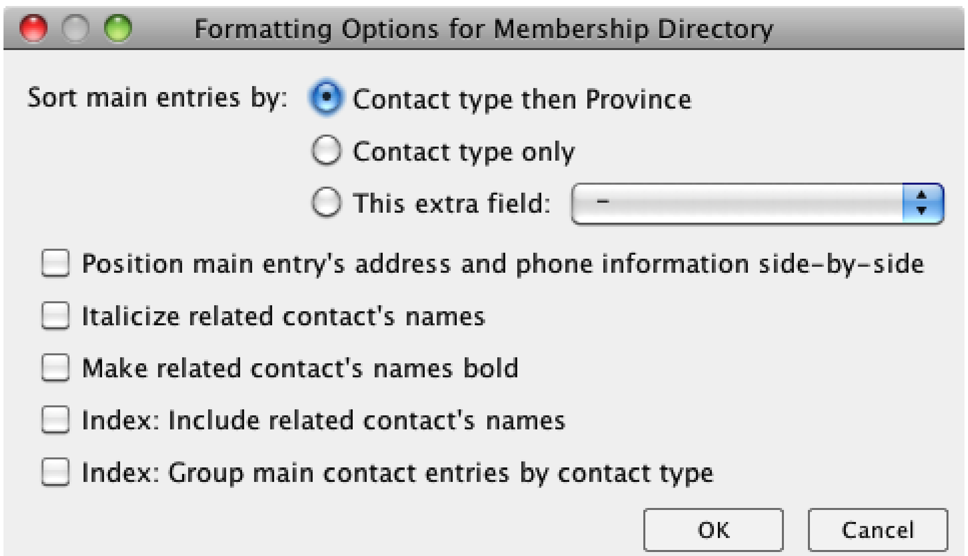
The dialog shows any contact that has any possible inclusion criteria:

- one of the chosen CONTACT types
- a current MEMBERSHIP
- CONTACT record indicates inclusion

Based on your selection criteria, CONTACTS to be included are green, CONTACTS to be excluded are red.

Click OK if the list is as expected. Click Cancel if something is wrong and you need to change some data or start the directory process over again, making different selections in the previous dialogs.

Now you are prompted to make choices about how the membership directory should be formatted:



Formatting Option	*Description*
Sort main entries by:	◆ Contact type then state (province) • Level 1 titles: contact type • Level 2 titles: state • Level 3 titles: member name ◆ Contact type only • Level 1 titles: contact type • Level 2 titles: omitted • Level 3 titles: member name ◆ This extra field: • Level 1 titles: the chosen extra field • Level 2 titles: omitted • Level 3 titles: member name
Position main entry’s address and phone information side-by-side	If the directory is going to be printed in fairly wide columns, then the side-by-side format works best. If the directory is to be formatted in fairly narrow columns, then do not choose this option.
Italicize related contact’s names	The names of secondary CONTACTS – those related to CONTACTS at the top level of the directory – can be plain or italicized.

Formatting Option	Description
Make related contact's names bold	If the names of contacts who are related to a main member contact should be made bold, then click this option.
Index: Include related contact's names	If the names of contacts who are related to a main member contact should be in the index, then click this option.
Index: Group main contact entries by contact type	In the index, you can group the entries for the main member contact by contact type by clicking this option. If the option is not clicked, then these index entries are just arranged alphabetically like all others.

Finally, you are prompted for where to put the output file. Then Sumac creates the MEMBERSHIP directory as requested.

Creating an Index in a Membership Directory

Sumac creates the membership directory in RTF format. When you open the RTF document with your word processor, there is no index. However, all the appropriate entries in the directory are tagged so that your word processor can automatically create an index.

In your word processor, click where you want the index to be inserted. Then choose the appropriate commands to tell the word processor to gather tagged entries and create an index.

Create Membership Cards

Sumac can print MEMBERSHIP cards the same way that it prints labels, envelopes, and name tags. It assumes printing on sheets containing multiple cards arranged in rows and columns.

For more information on printing labels, see *Labels, Envelopes, and Name Tags* on page 469. For information on laying out how you want Sumac to print a MEMBERSHIP card, see *Layouts* on page 473.

Procedure: Email A Newsletter To Members

This procedure suggests steps for sending a newsletter to your members and to some CONTACTS related to your members. It assumes that you have set up the newsletter as a COMMUNICATION type, and that the CONTACT records for the members and their related parties indicate the newsletter as a communication preference.

- ✔ Open the MEMBERSHIPS list.
- ✔ Search to find the members who are to receive the newsletter:
  - Choose the newsletter from the Communication Preferences drop-down menu.
  - In the *Members current on this date* field, specify the date for which a MEMBERSHIP record must be current in order to receive the publication.
  - Click *Allow for grace days*, if appropriate.
  - If you want to send a different newsletter for different languages, then choose the language from the drop-down menu.
  - Click Search to find the target MEMBERSHIP records.
  - Now you have a list of the members who should get the newsletter, perhaps in one language variant.
- ✔ Click the Send Bulk Email button.

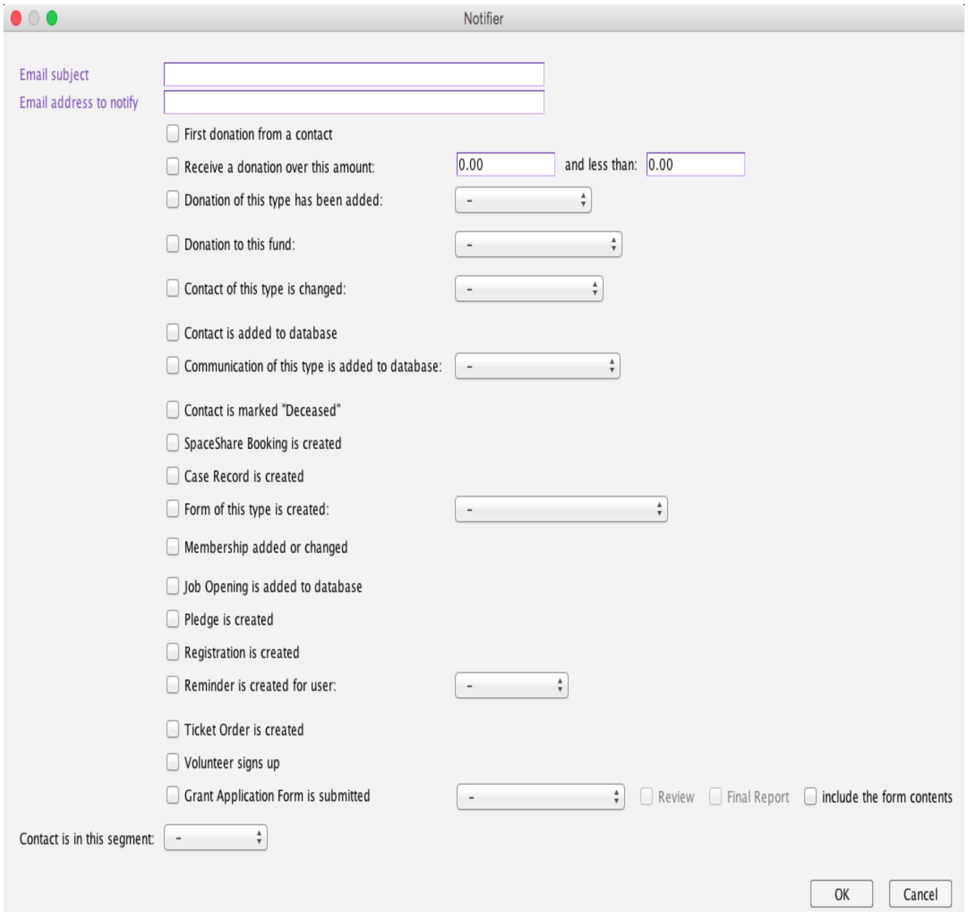
- ✔ You are asked if you want to send to only the members, or to CONTACTS related to the members receiving the email. Make the appropriate choice. Note that Sumac uses the setting of the Communication Preferences drop-down menu to ensure that the related CONTACTS want to receive the specified type of COMMUNICATION.
- ✔ If you chose to send to related CONTACTS, then you are also asked to specify the relationships which should cause a CONTACT to receive the newsletter. In this window, you select the relationships by dragging them from the left-hand list to the right.
- ✔ The next dialog is the standard dialog for setting up and sending emails. Fill it in appropriately and click Send.
- ✔ Then you are asked if you want to save COMMUNICATION records for each CONTACT who is sent the newsletter. If you do, then fill in the fields for the COMMUNICATION record and click Yes. Otherwise, click No.

At this point, the emails are generated and transmitted and, if you chose to do so, COMMUNICATION records are saved for each email that is sent.

Notifiers

Notes for the Sumac Administrator

Only a Sumac Administrator can create notifiers. Choose Utilities/Customize Database/Notifiers in the Sumac console.



Notifiers

A Notifier automatically sends an email to a specified email address when one of these things happen:

Donations

- A donor makes his or her first donation.
- A donor makes a donation within a certain range of values..
- A donor makes a donation of a certain type.
- A donor donates to a particular fund.

Communications

- A communication of a certain type is added to the database.

Contacts

- A contact of a certain type is changed.
- A contact is marked deceased.

- A contact is added to the database.
- A volunteer signs up

Grow-Your-Own Records

If your database has defined GYO records, then the Notifier window has checkboxes that let you notify someone whenever a GYO record is created.

Forms

If your database has defined Forms, then the Notifier window has a checkbox that lets you notify someone whenever a new form record is created.

Grant Applications

Specify whether the notifier email should include the contents of a grant application form. A notifier can be set for the following conditions:

- A specific application form is submitted
- An application form is reviewed
- An application form final report is submitted

Job Openings

A job opening is added to the database.

Membership

A membership record is added or changed.

Pledge

A pledge record is created.

Registrations

A new course registration record is created.

Reminder

A reminder is created for a particular user. If you do not choose a user, then the notifier sends a message whenever any reminder is created.

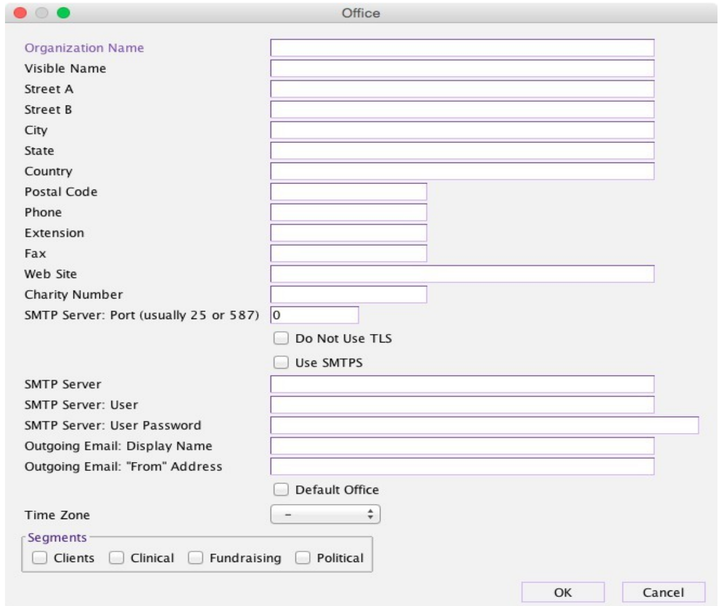
Ticket Order

Send a message whenever a ticket order is created.

Segments

If your database uses contact segments, then notifiers can be restricted to specific segments. If you choose a segment when creating a notifier, then the notifier is only activated when the current user is in the specified segment.

Offices



Office Records can be used to put information like your website, address, or charitable registration number into mail merge documents. They can also indicate the address of the office, which can be used to remove countries from labels. Office records also define the servers that Sumac should use to send bulk email in each office location.

Notes for the Sumac Administrator

To set up an office in your Sumac database, go to Console/Utilities/Customize Database/Offices. From here, you can fill the following fields:

Organization Name and Visible Name

The Visible Name of an office is the name that appears in drop-down menus when a user needs to choose an office. If this field is empty, Sumac shows the Street A field.

Address Fields

Fill out your office address details in the provided fields. Sumac uses this information in mail merge operations.

Charity Number

This field holds you government-issued charity number. It is accessible with a Mail Merge code, so Sumac can include it in a variety of mailing outputs.

SMTP Server

If you use Sumac to send bulk email, enter the information needed to send emails from your office. Sumac needs to know information about your SMTP server so that it knows how it should send emails. This information can usually be acquired from your Internet Service Provider (ISP). This field holds a maximum of 100 characters.

Outgoing Email

Sumac uses the outgoing display name and addresses as the default when sending bulk emails. You can set whatever email you wish recipients to see when they receive your email.

Default Office

The default office is the one that Sumac uses to calculate licensing information. If you change which office is the default, or if you change the Organization Name in this default office record, you must re-enter the licensing information for your Sumac installation. Contact Sumac to obtain new licensing information, if necessary.

> Hint: For a step by step guide of how set up an office record, please view our training video here: http://sumac.com/videos-database-administration/

Payments

Introduction

Sumac can record payment information. Credit card payments can be cleared instantly using an Internet-accessible credit card payment processing company.

Notes for the Sumac Administrator

Field Preferences

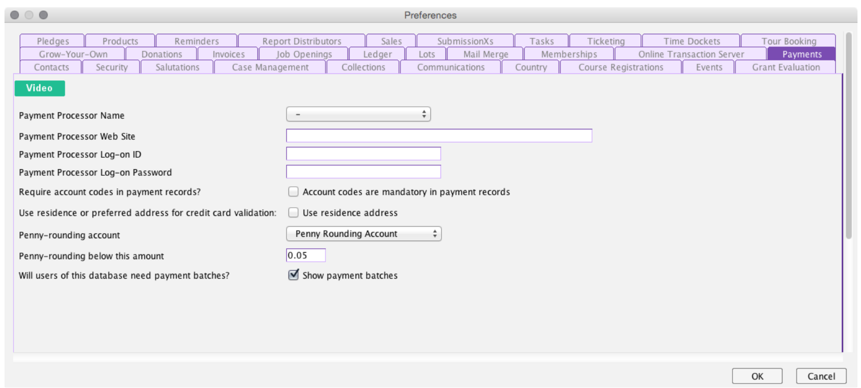
Use the Utilities/Customize Database/Field Preferences command in the Sumac console to:

- re-label fields
- completely remove fields from the user interface
- make fields mandatory, or
- determine which fields should appear on a website.

in PAYMENT records.

Preferences

Use the Utilities/Customize Database/Preferences command in the Sumac console to get the Preferences dialog. Click the Payments tab.



This tab allows you to:

- set up how Sumac should connect to a payment processor (if you are using one),
- indicate if account codes are mandatory in payment records
- specify whether residence (instead of preferred) address should be used for credit card validation
- set up penny rounding
- tell Sumac that you want to use Payment Batches.

Penny Rounding

Some countries have eliminated very small denomination coins. For example Canada used to have one-cent coins (pennies) but now its smallest denomination coin is five cents. So now, cash transactions are rounded up or down to the nearest five cents like this:

Payment Owing	*Payment Made*	*Result*
0.01	0.00	under pay by 0.01
0.02	0.00	under pay by 0.02
0.03	0.05	over pay by 0.01
0.04	0.05	over pay by 0.02
0.06	0.05	under pay by 0.01
0.07	0.05	under pay by 0.02
0.08	0.10	over pay by 0.01
0.09	0.10	over pay by 0.02

In practice, the amounts are trivial. but they do cause ledger entries to be out of balance. You can tell Sumac to solve this problem as follows:

- Create a debit account for penny-rounding amounts. Use Utilities/Customize Database/Lookup Lists/Payments.
- In the preferences window above:
  - Choose the penny-rounding account from the drop-down list of accounts.
  - Specify the amount that below which penny rounding applies. This will typically be the value of the smallest coin in circulation.
- Make sure that for each payment type that uses penny rounding (usually just cash payments, since credit cards can use exact amounts), make sure the checkbox *Round amounts in accordance with Preferences* is set. This also is done with the Lookup Lists command: choose Utilities/Customize Database/Lookup Lists/Payments

Payment Processor Identification

Enter the name of your payment processor in the name field. Then enter the processor's web site (where Sumac should send payment transactions). Here are values for some payment processors currently supported by Sumac.

Bambora (BeanStream)

Sumac connects to Bambora using their *Transaction Processing API*, so when you speak with Bambora, tell them you need access in that way.

Bambora requires two-character abbreviations for state and province names. If a state or province field contains something that is not two characters long, then Sumac attempts to convert long-form state and province names into two-character abbreviations.

Hash Validation

Bambora has instituted a security protocol that requires some organizations to change the text they enter in the Log-on Password field in Sumac. To get the new passcode, follow these instructions: https://help.na.bambora.com/hc/en-us/articles/360001533087-Enabling-Passcode. Once you have generated the passcode, enter it into Sumac's Password field, and click OK to save.

Field	What to Enter
Name	Bambora (BeanStream)
Web Site	api.na.bambora.com/scripts/process_transaction.asp

Log-on ID	a 9-digit number optionally followed by a space then a username
	`e.g. 123456789`
	`e.g. 123456789 TestUserName`
	Note that the username is not required by Sumac. It is only supported to handle legacy security settings in your Bambora account. If other software is clearing payments through your Bambora account, and that other software requires the username field to be set, then the configuration of your Bambora account requires Sumac to specify the username too.

Log-on Password	an alphanumeric password Hint: This password must be valid in a URL. In particular, it must not contain an ampersand.

BluePay

Field	What to Enter
Name	BluePay
Web Site	secure.bluepay.com/interfaces/bp20post
Log-on ID	a 12-digit number
Log-on Password	a 32-character long “secret key”

Century Business Solutions

Field	What to Enter
Name	Century Business Solutions
Web Site	payments.ebizcharge.com/web_services/webterm/transaction_processing.asmx
Log-on ID	merchantID-space-PIN e.g. `123456789012 4321`
Log-on Password	a 32-character long “source key” `e.g. fa9RY235E50Uq8kR0oVZvB34WbCHqL3u`

If you process payments using Century Business Solutions, in addition to processing credit card payments, you can also process payments that take funds directly from the payer’s bank account using ACH (Automated Clearing House).

Hint: ACH can only take funds from a U.S. bank account.

Chase Paymentech

Sumac integrates with Chase Paymentech using their Orbital Gateway. You need to get access to the Orbital Gateway, and when you do, Chase Paymentech will provide you with a user ID, password, and other required information as described below.

Field	*What to Enter*
Name	depending on your processing connection, enter one of the following: Chase Paymentech Salem Chase Paymentech PNS
Web Site	orbital1.paymentech.net
Log-on ID	orbitalUserID-space-merchantID-space-terminalID e.g. `CHARITY123 700000203516 001`
Log-on Password	orbitalPassword-space-currencyCode e.g. `CHARITYPA55WORD 124`

Here are explanations of the terms used in the above table:

orbitalUserID	between 8–32 characters (a-z, A-Z, 0-9)	
merchantID	a 6-digit Salem Division Number or a 12-digit PNS Merchant ID	
terminalID	between 001 and 999; typically 001	
orbitalPassword	between 8–32 characters (a-z, A-Z, 0-9)	
currencyCode	Australian Dollar	036
	British Pound	826
	Canadian Dollar	124
	Euro	978
	U.S. Dollar	840

Hint: When you use Chase Paymentech it is imperative that the Payment Processor Code field in the payment types for Visa and Discover be filled with *Visa* and *Discover* respectively.

Chosen Payments (Canada)

Choose this payment processor for processing payments in Canada (see below to use Chosen Payments in the U.S.). You need four pieces of information:

- company key/request key: a four-digit number
- terminal ID: a four-digit number
- currency code: a three-digit number (*124* for CAD, *840* for USD)
- PIN: a four-digit number

Chosen Payments will supply you with a company key/request key, terminal ID, and PIN.

These pieces of information are entered into the Sumac fields as described here.

Field	*What to Enter*
Name	Chosen Payments
Web Site	prd.txngw.com
Log-on ID	company key – space – terminal ID e.g. `5990 6177`
Log-on Password	currencyCode – space – PIN e.g. `840 1234`

Chosen Payments (US)

TGate (Chosen Payments operating in the U.S.) will supply you with a user name, and password. These are entered into the Sumac fields as described here:

These pieces of information are entered into the Sumac fields as described here.

Field	*What to Enter*
Name	Chosen Payments (US)
Web Site	gateway.itstgate.com/SmartPayments/Transact.asmx/ProcessCreditCard
Log-on ID	alphanumeric user name
Log-on Password	alphanumeric password

Converge (Elavon)

Elavon will supply you with a merchant ID, user ID, and PIN. These are entered into the Sumac fields as described here:

Field	*What to Enter*
Name	Elavon
Web Site	api.convergepay.com/VirtualMerchant/processxml.do
Log-on ID	merchant ID – space – user ID e.g. `000051 000053`
Log-on Password	PIN: a six-character string e.g. `0GLEYJ`

iATS (Canada and US)

iATS (International)

Field	*What to Enter*
Name	IATS
Web Site	Canada and U.S.: www.iatspayments.com/Netgate/processlink.asmx International: www.uk.iatspayments.com/Netgate/processlink.asmx
Log-on ID	use your IATS Link user ID (an alphanumeric ID)
Log-on Password	use your IATS Link user password (an alphanumeric password)

Moneris

A special warning about Moneris integration: By default Moneris enables Verified by Visa and Mastercard Secure Code, but Sumac does not support these services in its Moneris integration. You must tell Moneris to turn off these two features to prevent payment errors in the user interface. This is mandatory for ensuring Sumac can process payments using Moneris.

Sumac connects to Moneris using *DirectPost* which is part of *eSELECTplus*, so when you speak with Moneris, you must tell them you need access in that way. This is also mandatory for ensuring Sumac can process payments using Moneris.

On the Moneris website, you can configure DirectPost. It asks you:

✔ Transaction Type: choose Purchase

✔ Response Method: choose XML.

Field	*What to Enter*
Name	Moneris
Web Site	www3.moneris.com/HPPDP/index.php
Log-on ID	the generated DirectPost store ID (random looking text about 10 characters long)
Log-on Password	the generated DirectPost key (random looking text about 10 characters long)

PaySafe (Optimal Payments)

Field	*What to Enter*
Name	PaySafe (Optimal Payments)
Web Site	there are two URLs: one for credit cards and one for ACH (EFT), separated by a space: api.netbanx.com/cardpayments/v1/accounts/ webservices.optimalpayments.com/directdebitWS/DirectDebitServlet/v1
Log-on ID	CCAccount – space – ACTAccount – space – StoreID This field must contain three items items separated by spaces: CCAccount: your account number for processing credit cards ACTAccount: your account number for doing ACH (EFT) transactions StoreID: your store ID
Log-on Password	APIKey – space – StorePassword This field must contain two items items separated by a space: APIKey: the key to be used for credit card payments StorePassword: store password

Hint: If you are only doing credit card transactions, i.e. not doing ACH/EFT payments, you can use “x” as your ACTAccount.

Hint: The APIKey that you get yourself from the PaySafe website is incomplete. You need to contact Paysafe technical support directly a proper APIKey.

PayPal

The following information will help you set up your PayPal account:

✔ Get a PayPal Business Account.
  - Canada: https://www.paypal.com/ca/webapps/mpp/merchant
  - U.K.: https://www.paypal.com/uk/webapps/mpp/merchant

- U.S.: https://www.paypal.com/us/webapps/mpp/merchant

✔ Get PayPal/Website Payments Pro
- Canada: https://www.paypal.com/ca/webapps/mpp/paypal-payments-pro
- U.K.: https://www.paypal.com/uk/webapps/mpp/pro
- U.S.: https://www.paypal.com/us/webapps/mpp/paypal-payments-pro

✔ Request API Credentials from your PayPal Business Account.
- Profile/My Selling Tools/API Access(Update)/View API Signature
- Required Credentials: API Username, API Password, Signature

✔ Get Currency Code
- https://developer.paypal.com/docs/classic/api/currency_codes/

✔ Enter the appropriate information into Sumac:

Field	*What to Enter*
Name	PayPal
Web Site	api-3t.paypal.com/nvp
Log-on ID	APIUsername – space – signature
Log-on Password	APIPassword – space – currencyCode

Hint: If you submit proof of non-profit status your fees are reduced.

Hint: If you receive many very small payments, you should inquire about PayPal's microtransaction option.

Vanco Services

Field	*What to Enter*
Name	Vanco
Web Site	www.vancoservices.com/cgi-bin/ws2.vps
Log-on ID	This contains two items separated by a space: first your Client ID, then a space, then your User ID. A Client ID is usually a number preceded by *ES*, like *ES1234*. A User ID is eight characters long, mostly alphabetic.
Log-on Password	Use your Vanco Web Services Password – a random looking group of alphanumeric characters.

If you process payments using Vanco, in addition to processing credit card payments, you can also process payments that take funds directly from the payer's bank account using ACH (Automated Clearing House).

Hint: ACH can only take funds from a U.S. bank account.

A Sumac payment record for an ACH transaction must specify at least these fields:

✔ Bank Number-Bank Transit: This field is also sometimes referred to as a routing number.

✔ Bank Account: Enter the payer's bank account.

✔ Is Savings Account: If the account is a savings account, click this checkbox. if the checkbox is not clicked, Sumac assumes the account is a chequing account.

Vantiv Integrated Payments (formerly Mercury Payment Systems)

Field	*What to Enter*
Name	Vantiv (Mercury Payment Systems)
Web Site	w1.mercurypay.com/ws/ws.asmx
Log-on ID	This is sometimes called a Global Merchant Number, a Merchant Number, and occasionally a Terminal ID Number. It is a numeric ID around 10 digits long. In the U.S.A., it usually starts with either *0087* or *884*. In Canada it usually starts with *44*.
Log-on Password	Use your merchant password – a random looking group of alphanumeric characters.

Payments for Donations

If you click this check box, then Sumac asks a user to create a PAYMENT record for each DONATION. These PAYMENT records are displayed when the DONATION is later edited or examined. They also appear in the PAYMENTS list.

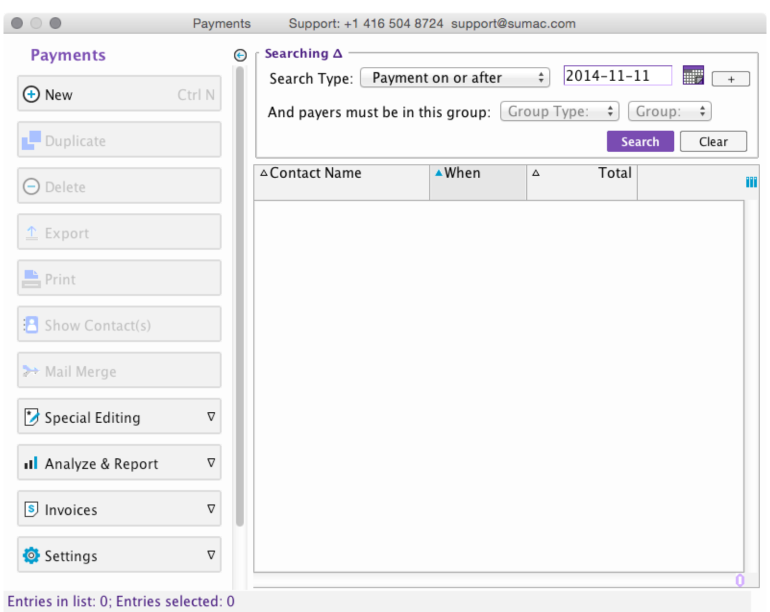
Account Codes Are Mandatory

Click to select check boxes that indicate account codes must be specified in various types of records.

Use Residence Address

When a payment processor requires address verification, Sumac normally uses the payer contact's preferred address (residence or business). But if you want to force Sumac to always use the residence address, click this checkbox.

The Payments List



Searching

Search Criteria	*What Is Found*
Payment Date	Find PAYMENTS dated in the specified date range. Note that you can specify a start date, an end date, or both.
Payer	Find PAYMENTS made by a specific CONTACT.
Payer's Last Name	Find PAYMENTS made by CONTACTS whose last or company name starts with the letters entered.
Payment Purpose	Find PAYMENTS for a particular purpose.
Linked Information	Find PAYMENTS linked to a particular type of record (e.g. a donation, a pledge, or a ticket order).
Payment Type	Find PAYMENTS of a particular payment type.
Processed Status	Find PAYMENTS that have or have not been processed.
Reconciled Status	Find PAYMENTS that have or have not been reconciled.
Account	Find PAYMENTS for a particular account.
Payment Batch	Choose a payment batch and find its PAYMENTS.

You can also specify a Group. Sumac finds only those payments whose payer is in the chosen group.

Special Editing

Clear

This command is a security feature. It removes credit card information from old payment transactions. This must be done periodically needed to ensure complete compliance with PCI-DSS standard for the safe handling of credit card information. Typically, you should clear credit card information from any payments that are over 90 days old, but if your contract with a payment processor contains special settlement provisions you may want to increase this a bit.

Search to find the transactions whose payment information should be removed. Then choose this command.

Process

Choose this command to process PAYMENTS that are showing or selected. Processing causes Sumac to send messages about each PAYMENT to the payment processor that the Sumac Administrator has configured Sumac to use.

As each credit card PAYMENT is processed, an authorization code is received from the payment processor, and is stored in the PAYMENT record. In addition, the verification value (CVV2) is cleared, to comply with PCI-DSS security standards.

Refund

Click to select one credit card payment that is to be refunded. Then click Refund. This causes Sumac to show you a PAYMENT like the one being refunded, but with a negative amount. If you click the Process button in the PAYMENT, then the PAYMENT is refunded to the payer's credit card.

Analyze & Report

The Analyze & Report menu lets you produce several reports, including these:

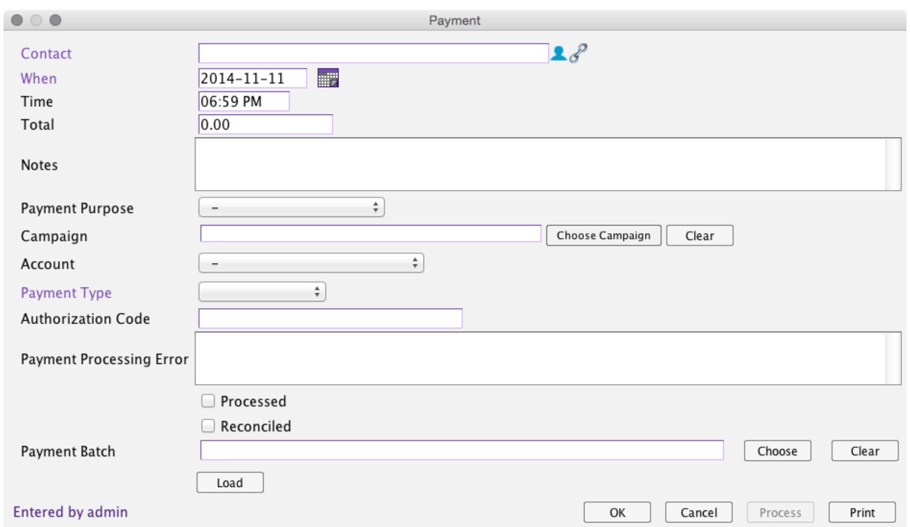
Report	*Usage*
Summary by Purpose	Each row of this report shows a contact. The columns indicate the total of payments by each contact broken down by payment purposes. Search to find all the payments of interest, then then choose the report from the drop-down menu.
Send to Bank	This button is used to put several payment records, which represent transfers from payers' bank accounts to you, together into a single file. The file is then sent to the bank for batch processing. When you click this button, you are asked to pick a Payment Batch Specification. For more information, see *Payment Batch Specifications* on page 630.

Invoices

An invoice can contain several charges and several payments. Commands in this window let you can create an invoice to include a payment. If there is already an invoice for a payment, you can show that invoice.

Enter Payments

If you are creating a payment from scratch, click the New button. If you are creating a payment that is similar to another payment in the list (e.g. because it is a similar value payment from the same contact, or if you are adjusting or refunding a payment), then click to select the similar one, then click New. This dialog appears:



Choose a contact, and specify the date and total amount of the payment. If appropriate (e.g. if the payment is unusual or for an adjustment), then enter notes.

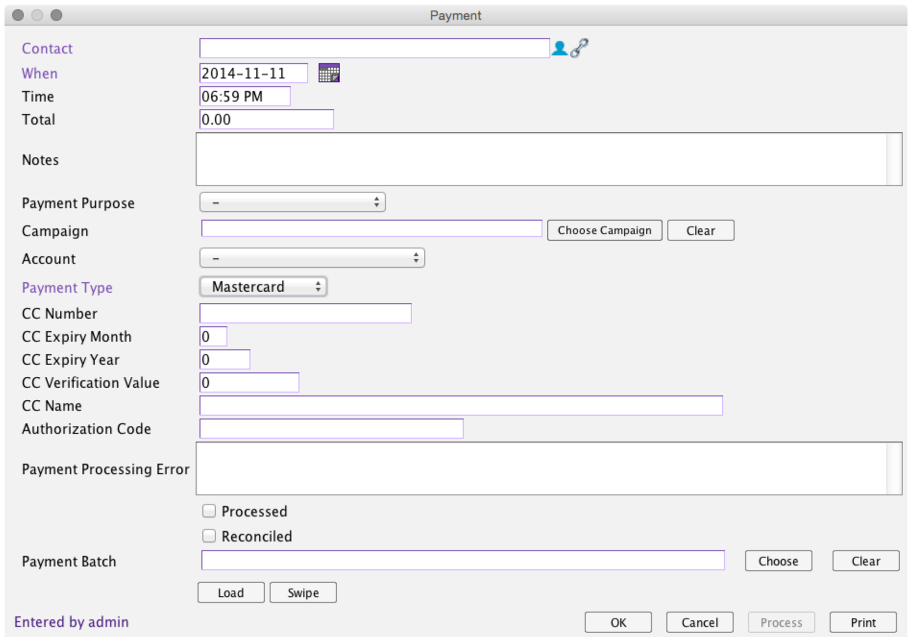
If the payment record is created manually in the payments list, then it is not linked to what it paid for. If, however, the payment was created from a donation or ticket order, it is linked to the donation or ticket order. In this case, the Paid For field shows what the payment was for.

Cash Payments

If a cash payment is being entered, Sumac shows two additional fields:
One allows you to enter the amount of cash that was tendered. The other automatically calculates the amount of change that is due to the payer. Note that these calculations factor in penny-rounding if it is in use (see *Penny Rounding* on page 279).

Credit Card Payments

The appearance of the dialog changes depending on the PAYMENT type. For example, if you choose a credit card PAYMENT type, the PAYMENT dialog looks like this:

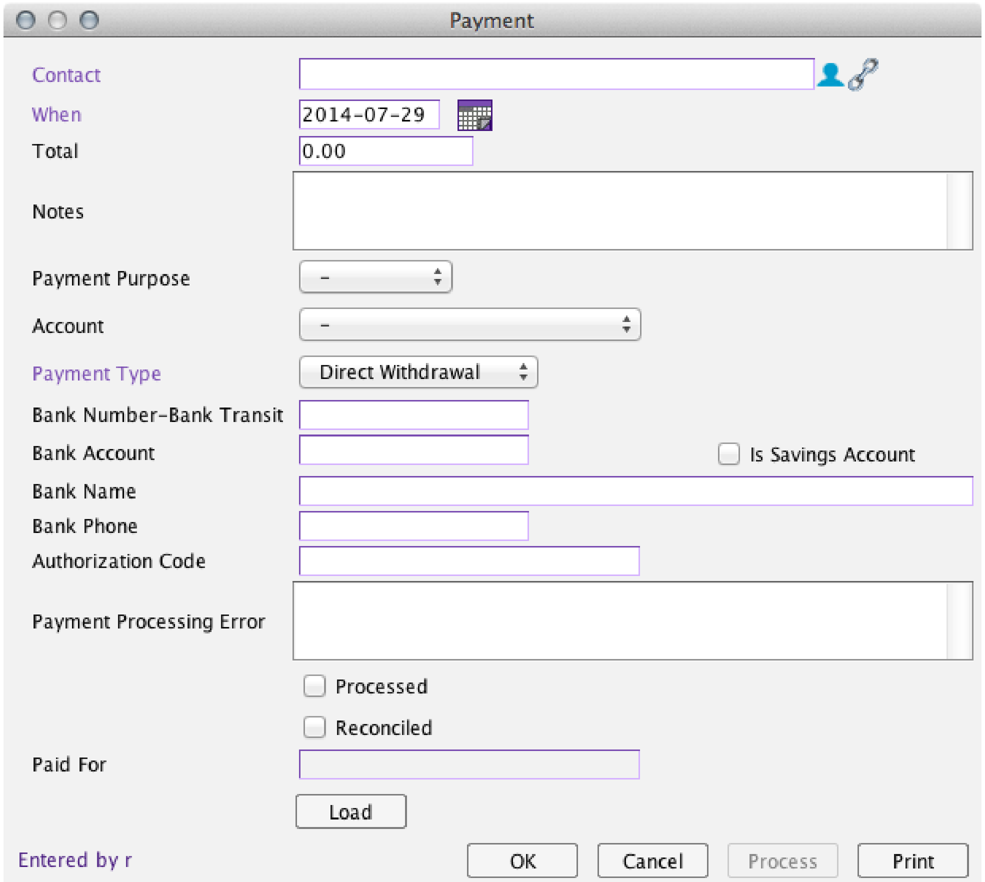


The following fields should be considered:

CC Number	Enter the primary credit card number.
CC Expiry Month	Enter the expiry month of the credit card.
CC Expiry Year	Enter the expiry year of the credit card.
CC Verification Value	(optional) Enter the CVV2 value, normally a three or four digit number.
CC Name	Enter the name of the person as it appears on the credit card.
Authorization Code	When you click Process, Sumac fills this field with an authorization code returned by your payment processor.
Payment Processing Error	If a processing error occurred (e.g. card has been cancelled, card declined), the error message is displayed in this field.

ACH or EFT Payments

If the payment type you choose is for a direct withdrawal from a bank account, the Payment window looks like this:



The following fields should be considered:

Bank Number – Bank Transit	Different countries have different formats for the data that identifies the bank that holds the account from which funds are being withdrawn. These numbers go in this field. Note that when working with these number, leading zeroes matter: e.g. do *not* change the bank number *012* into *12*. USD: Routing number (9 digits) CAD: Bank number (3 digits) - transit number (5 digits) GBP: Sort code (6 digits)
Bank Account	Enter the bank account number.
Bank Name	(optional) it is helpful to have the Bank Name, in case you need to follow up later
Bank Phone	(optional) it is helpful to have the Bank Phone, in case you need to follow up later
Is Savings Account	If the account is a savings account, click this checkbox.

Authorization Code	When you click Process, Sumac fills this field with an authorization code returned by your payment processor. Note that bank transfers can fail. About 24 hours after processing the payment, use your payment processor's website to see whether the transaction succeeded.
Payment Processing Error	If a processing error occurred (e.g. card has been cancelled, card declined), the error message is displayed in this field.

Load Button

Sometimes a patron wants to make a payment using the credit card details they used in their last payment. The Load button searches to find the most recent payment by the selected patron, then puts that previous payment's details into the one you are entering. This saves you the need to find the transaction and copy it manually.

Processed Check Box

Each payment has a Processed check box. A payment is considered to be processed when the amount to be paid has been collected from the payer.

When your installation of Sumac is configured to use a payment processor, this check box is controlled automatically for PAYMENTS that the payment processor can handle (typically, credit cards). If you do not use a payment processor, or if the PAYMENT is of a type that cannot be sent to the payment processor, then you should manually click to indicate when a PAYMENT has been processed.

Reconciled Check Box

This check box is purely for your convenience. Click this checkbox as you reconcile payments in Sumac with statements from your bank or payment processor.

Card Reading Devices

Magnetic Stripe Card Readers

Sumac supports card swipe machines to save time entering credit card information into Payment records. For our in-house testing, we use a MiniMag II device from IDTech. But any USB credit card magnetic stripe scanner which emulates a keyboard, and does *not* mask or encrypt its output, should work fine.

When you are entering a payment record, here is what to do to use a card swipe machine:

- ✔ Choose a payment type which is a credit card type of payment (e.g. Visa, MasterCard).
- ✔ Click the *Swipe* button. This tells Sumac to start listening for keyboard input that comes from a card swipe device.
- ✔ Swipe the card. The card number, expiry date, and name field are filled into the appropriate fields in the dialog.
- ✔ If you clicked *Swipe* by mistake or change your mind after clicking *Swipe*, use your mouse to click in the dialog. This returns Sumac to its normal keyboard mode.

Payment Machine: Moneris iCT250

Introduction

Sumac can work with the Moneris iCT250 card reading device. This machine can read many types of payment cards. Sumac can use this machine to process payments and also to process refunds.

Acquiring

When you acquire your iCT250, make sure to mention that it will be used with Sumac. Moneris may require the Sumac VAR Code. It is *SA-ICT-41*. This tells Moneris how to configure the machine to work with the options that are available in Sumac.

Configuration

The supported configuration is to have the iCT250 connected to the same Ethernet network as the computer(s) running Sumac, and the iCT250 should have access to the Internet so it can connect to Moneris to process transactions.

Here are steps for setting up a Moneris iCT250 to work with Sumac:

- ✔ Decide on or gather the following information for setting up the terminal:
  - IP address and subnet mask: An internal static IP address for the terminal
  - Gateway Address: the IP address of the gateway of the network that the machine is connected to
  - Primary DNS address: IP address of the DNS of the network the iCT250 machine is connected to
- ✔ Decide on or gather the following information for setting up Sumac:
  - Port Number: A common port number that is open on all of the computers meant to communicate with the iCT250 machine.

  Hint: The above can either be setup or retrieved by a tech person. The *ipconfig* command on Windows machines and the *ifconfig* command on Macintosh and Linux machines should help.

- ✔ Download the manual *Using Your Semi-Integrated Terminal Moneris® iCT250*:
  - http://www.moneris.com/merchant-support/downloadable-guides/~/media/Files/ICT250/ict250_v2-43_si-uyt-e.ashx
- ✔ Download the manual *Setting up Your Terminal Moneris® iCT250*:
  - http://www.moneris.com/merchant-support/downloadable-guides/~/media/Files/ICT250/ict250_v2-43_syt-e.ashx
- ✔ Follow steps on page 4 the *Using* guide.

  Hint: In the terminology of these two manuals, you are setting up the iCT250 machine in *Semi-Integrated* mode. Also, when the manuals refer to an *ECR*, they are referring to the computer(s) that Sumac is running on.

- ✔ Once completed one additional step must be performed in order to avoid an *ECR Printing Error* from appearing on the terminal after each transaction. Follow these instructions, swiping the administrator card whenever the machine asks you to:
  - Press “.,#* button twice, enter in the admin code 08 and then click the green button.

- Scroll down to “SEMI-INTEGRATE” and click the green button.
- Scroll down to “RCPTS AT TERM” and then click the green button.
- After this we need to reinitialize the machine so press the red button once and the # button once, enter the admin code 01, press the green button and allow the machine to restart.

✔ Tell Sumac about the payment machine. In the Sumac console window, click Utilities/Customize Database/Lookup Lists/Payments/Payment Machines. See *Payment Machines* on page 631.

✔ When the iCT250 processes a payment, it sends a code to Sumac to indicate what type of payment occurred. These are the codes that may be returned: AMEX, DISCOVER, FLASH, INTERAC, JCB, MASTERCARD, VISA. In order for Sumac to understand these codes, you must create a payment type (see *Payment Types* on page 632) for each of the types of payments that you allow (for example, if you do not allow JCB cards, then you do not need a payment type for JCB), and enter the iCT250 into the Payment Processor Code fields of the payment type record.

Usage

Use the iCT250 to process payments:

In the payment record, make sure you have chosen a payer contact, a date, and an amount greater than 1.00. If you record a negative payment amount, then Sumac treats the payment record as a refund and instructs the iCT250 to process a refund of the specified amount.

Click the *Use Machine* button. Choose the appropriate payment processing machine from the drop-down menu of choices. This causes Sumac to send transaction details to the iCT250 and wait for it to respond.

The iCT250 then leads you through the remaining steps necessary to process the payment.

When it is done, Sumac either closes the Payment window if the payment succeeded or displays an error in the Payment Processing Error field.

You must click the green button one final time, after the payment is done, to return to the *READY WELCOME/BONJOUR* message on the machine.

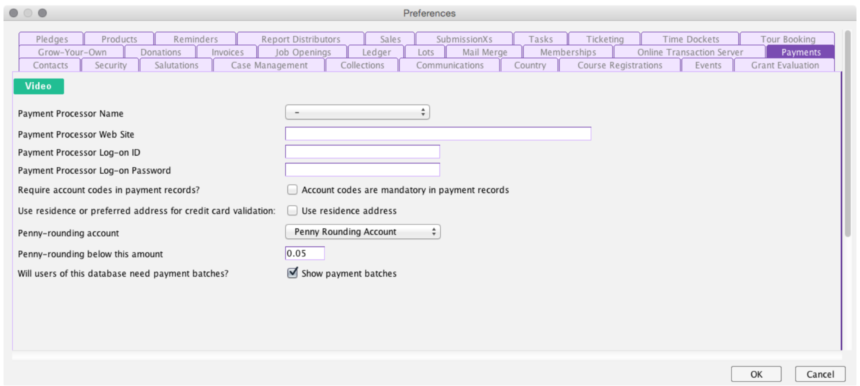
Payment Batches

Introduction

These let you record payments in batches then, using invoices, indicate what the payments have paid for (e.g a donation and a membership).

Notes for the Sumac Administrator

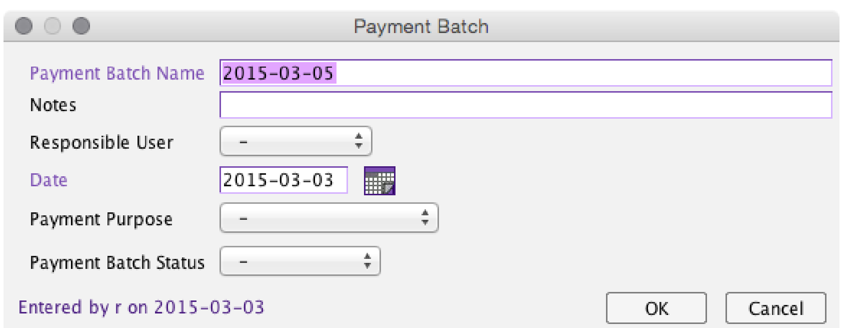
Use the Utilities/Customize Database/Preferences command in the Sumac console to get the Preferences dialog. Click the Payments tab.



You must click the last checkbox – *Show payment batches* – to see payment batches in the Sumac console window.

Using Payment Batches

Click New to add a batch of payments.



Payments

With a payment batch selected, click New to add a payment records to the batch. The Payment Purpose entered in the payment batch will be used in the payments that are entered for the batch.

Click the expansion icon for a payment batch to show the payments that are part of it. You can list payments sorted either by payer names or by entry order.

Invoices

With a payment selected, you can click Create Invoice to create an invoice for that payment. The invoice lets you record what the payment paid for.

Note that a payment that has a related invoice is displayed in different colour, according to the Sumac colour scheme you are using.

If a payment has an invoice, when you click to select the payment you can click Show Invoice to see the related invoice.

Pledges

Introduction

A PLEDGE is a promise from a CONTACT that the CONTACT intends to make one or more DONATIONS. A PLEDGE may include detailed payment instructions to enable you to collect the funds pledged.

DONATIONS can be made from PLEDGES. Such DONATIONS are linked to the PLEDGE which created them.

Notes for the Sumac Administrator

Field Preferences

Use the Utilities/Customize Database/Field Preferences command in the Sumac console to:

- re-label fields
- completely remove fields from the user interface
- make fields mandatory, or
- determine which fields should appear on a website.

in Pledges.

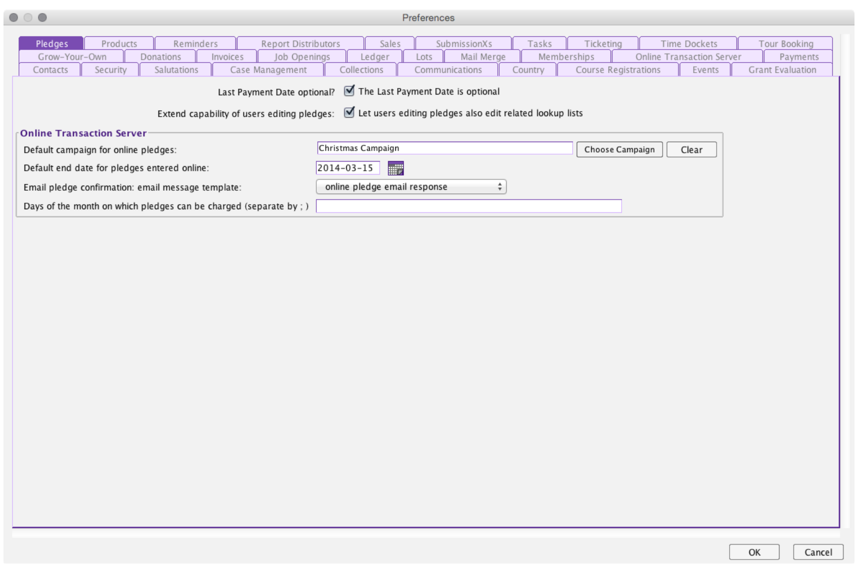
Preferences

Security Tab

You can set check boxes to tell Sumac to automatically log the creation, editing, and deleting of pledges.

Pledges Tab

Use the Utilities/Customize Database/Preferences command in the Sumac console to get the Preferences dialog. Click the Pledges tab.



You can specify that you do not want Sumac to require a last date for each pledge. If you do not specify this option, then Sumac requires each pledge to have a final payment date.

If users who enter pledges should be allowed to edit the lookup lists that affect pledges, click the *Let users editing pledges also edit related lookup lists* check box. If you click this check box, then users who can alter pledges will have a Utilities menu in their Pledge list window that lets them alter these lookup lists: Accounts, Donation Types, Funds, Pledge Statuses and Payment Types. They are also given an option to edit certain lists from within the pledge record by selecting *New* in the appropriate drop down menu.

Pledges On Your Website

If you are licensed to use Sumac web integration and the Pledges module, then you are also able to accept pledges online through your Sumac donation page. The fields in the *Website Integration* section of your PLEDGES preferences tab apply preferences to how Sumac handles online PLEDGES:

Preference	*Impact on Pledges from Website*
Default campaign	When a donor submits a pledge online, they are not able to specify a campaign. If you would like Sumac to assign all pledges to a specific campaign, select it from your campaigns list. For campaign set up instructions, see page 138.
Default end date	When a donor submits an online pledge, you can tell Sumac to assign an automatic end date for each pledge.
Template for email confirmation	Specify a template for Sumac to send after a pledge is submitted online.
Days of the month on which pledges can be charged	When a pledge is submitted online, the donor is able to choose the day of the month for funds to be charged. Enter the days of the month on which pledges can be processed. Note that the days must be between 1-28.

The Pledges List

Sumac automatically calculates actual values for pledges, and shows them in the Actual Receipts column. When actual receipts are displayed, the ones that are less than the amount Expected By Now are shown in red.

Searching

For more powerful multi-step searches, use general control. General control specifies what Sumac should do with the pledges it finds. For more information about general controls, see page 87.

Search Criteria	*What Is Found*
Payments span this date	Find PLEDGES whose payment stream is in effect at a particular time
End Date	Find PLEDGES whose end date is in a date range.
Status	Show PLEDGES whose status is the status chosen in a drop-down menu.

Search Criteria	*What Is Found*
Completed & Not Yet Renewed	Find PLEDGES that have been completed (the value of donations to this pledge is at least the total amount pledged) and which have not been renewed (there is no subsequent pledge from the same donor).
Donation Type	PLEDGES whose donations are of a particular donation type.
Payment Type	PLEDGES that specify a particular payment type.
Event	PLEDGES made as a result of a particular event.
Campaign	PLEDGES whose donations are being recorded against a specific campaign.
Campaign and its Children	PLEDGES whose donations are being recorded against a specific campaign or children of that campaign.
Fund	PLEDGES to make DONATIONS for a particular fund.
Fund Type	PLEDGES to make DONATIONS for a particular type of fund.
Fund Code	Enter the pattern of characters you are looking for in your structured fund codes. There are two special characters to use in this searching: % matches any number of characters _ matches any single character. For example, to find PLEDGES for funds that have 456 in their four, fifth, and sixth positions, search for this (do not include spaces between characters, they are just there to clearly separate the three underline characters and the three digits): `_ _ _ 4 5 6`
Account	PLEDGES whose donations being recorded against a specific account.
Donor Last Name	PLEDGES from a particular CONTACT.
Donor Communication Preference	Find PLEDGES from contacts with a specified communication preference.
Soft Credit Name	Find PLEDGES whose soft credit contact name matches what you enter.
Solicitor	Choose a contact. Find all pledges whose solicitor is the specified contact.
Day of Month	Find PLEDGES which are paid on a certain day of the month.
Commitment Date	Show PLEDGE by their commitment date. Note that this is often the same as the date when the PLEDGE was added to the database.
Total Amount	Find pledges whose total pledged amount is in a range of values.
Entered By	Search by the user who entered the PLEDGE.
Show All	Show all PLEDGES.

Search Criteria	What Is Found
*** Due this month	Find PLEDGES that indicate a payment in a particular month. Click *Not processed in this month* to find PLEDGES that are due in the specified month but have not been processed (i.e. used to generate a DONATION) in the specified month.
*** Last payment soon	Finds PLEDGES that are going to expire within the specified the number of days from today.
*** Credit card expires soon	This search helps you keep credit card information in the PLEDGES up to date. Once you find credit cards that are about to expire, you should communicate with the CONTACT to obtain updated payment information, then save it in the PLEDGE record.
Overdue Pledges	Finds all PLEDGES that are overdue as of search date.
Irregular Payments	Finds PLEDGES with regular or irregular payments.
Group	You can search to find PLEDGES where the donor is in a particular group of contacts.

Hint: If you specify more than one search criterion, then all criteria are used.

Hint: If you want to find PLEDGES that need to be processed on a particular date, search for PLEDGES due in a particular year/month, then click the column title to sort by Day of Month. You can then type the desired day of the month and Sumac scrolls the PLEDGES list to the first PLEDGE payable on that day.

Buttons

Show Contact(s) Button

Click to select a PLEDGE in the scrolling list. Then click Show Contact(s) to see the details about the CONTACT who made the PLEDGE. If more than one CONTACT is identified by the selected records, then this button brings the CONTACTS list to the front and shows the selected CONTACTS.

Mail Merge Button

For further information, see *Mail Merge* on page 479.

Labels/Envelopes Button

For further information, see *Labels, Envelopes, and Name Tags* on page 469.

Process Pledges Button

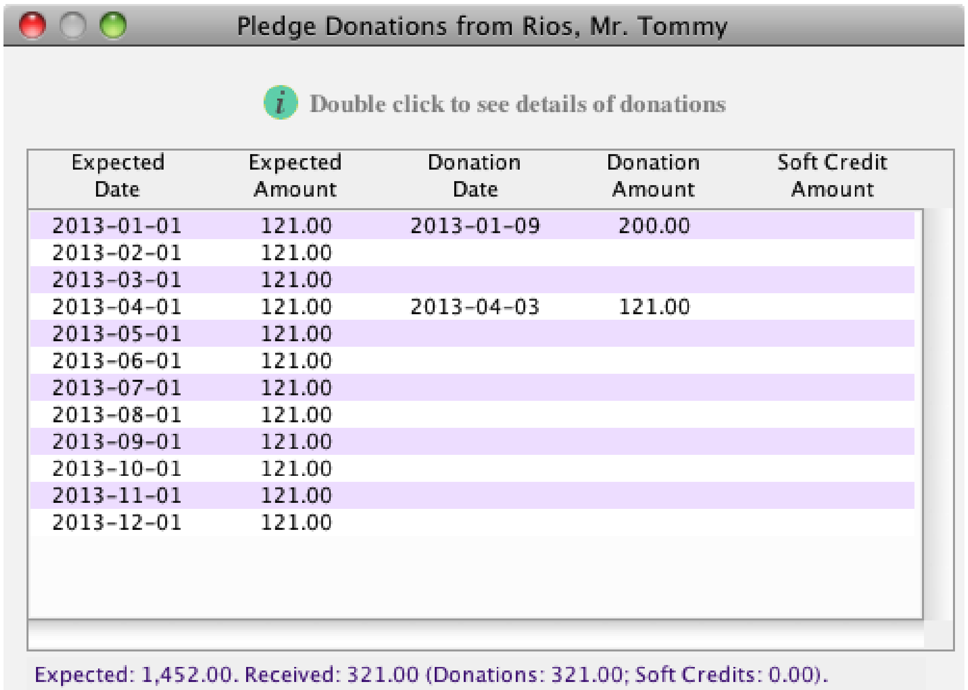
The PLEDGES showing in the list (or just those selected) are used to create DONATION records, recording each DONATION made by the relevant CONTACT. This would typically be done once the payment has been received or is about to be received.

When you click Process Pledges, Sumac checks to determine if any DONATIONS were created from the chosen PLEDGES in the last three weeks. If so, it warns you and lets you stop the operation. This helps to prevent you from accidentally creating DONATION records from the same PLEDGES more than once in a month.

The Process Pledges button also gives you the option of specifying a payment date for the donation and payment records that are created.

Show Donations Button

When you click to select a PLEDGE in the scrolling list, then click this button, a dialog like this appears:



Expected Date	Expected Amount	Donation Date	Donation Amount	Soft Credit Amount
2013-01-01	121.00	2013-01-09	200.00	
2013-02-01	121.00			
2013-03-01	121.00			
2013-04-01	121.00	2013-04-03	121.00	
2013-05-01	121.00			
2013-06-01	121.00			
2013-07-01	121.00			
2013-08-01	121.00			
2013-09-01	121.00			
2013-10-01	121.00			
2013-11-01	121.00			
2013-12-01	121.00			

Expected: 1,452.00. Received: 321.00 (Donations: 321.00; Soft Credits: 0.00).

This dialog shows (first two columns) the payments expected from the chosen PLEDGE over its entire duration. It also shows (third and fourth columns) payments that have actually been received. The last column shows amounts that have been soft-credited to this pledge.

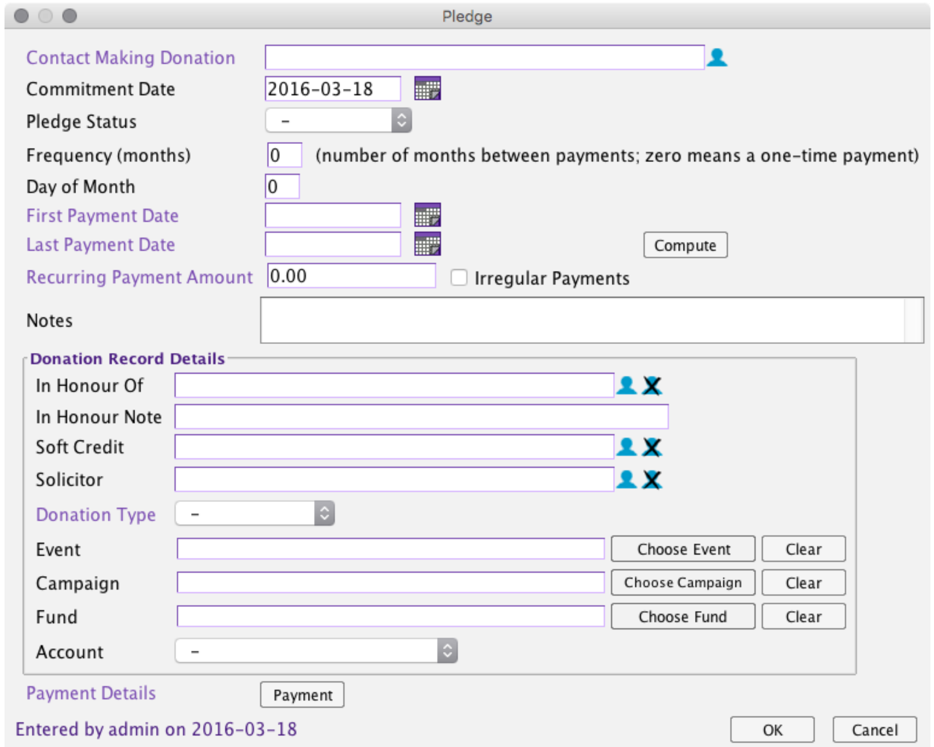
Where possible, Sumac matches up received payments with expected payment dates. If some received payments do not match, they are placed at the bottom of the list.

Any row that shows a donation can be double clicked to view the details of the donation.

Note that the status bar at the bottom summarizes the various actual payments.

Enter Pledges

- ✔ Show the PLEDGES list and Click the New button. Alternatively, show the CONTACTS list, click to select a CONTACT, and choose Pledge from the New drop-down menu. This dialog appears:
- ✔ Specify the CONTACT making the PLEDGE. If you started creating the PLEDGE from the CONTACTS list, then the CONTACT has already been specified.
- ✔ Specify the dates, frequency, and amounts. If you want some help with calculations, click the Compute button. You can enter the figures that you know, and Sumac will calculate the others for you.



- ✔ Specify the date when the donor committed the pledge. This date is optional, and Sumac gives it a default value of the current date.
- ✔ If payments under this PLEDGE are to be regular, equal amounts recurring in a predictable manner, then:
  - In the Frequency field, enter the number of months between payments. For example, for a monthly payment enter 1, for a quarterly payment enter 3. If the payment is a one-time only payment, enter zero into this field.
  - In the Day of Month field, enter the day within each month the payment is to be processed.
  - In the First Payment Date field, enter the date of the first payment.
  - In the Last Payment Date field, enter the date when your organization will receive the last payment.
  - In the Recurring Payment field, enter the amount of each individual payment.
- ✔ If payments under this PLEDGE are expected to be irregular, and you only really know the time period and total amount pledged, then:
  - Click the Irregular Payments check box. You will note that when you do this, the Recurring Payment Amount field gets re-labeled to be the Total Amount field.
  - Enter the Total Amount of all the pledged payments.
  - In the First Payment Date field, enter the expected date of the first payment.
  - In the Last Payment Date field, enter the date of the end of the period by which you should have received the whole pledged amount.
- ✔ If there are special considerations for this PLEDGE, document them in the Notes field.
- ✔ Specify details about DONATION records that are going to be created from this PLEDGE by entering values for the appropriate DONATION fields.

- ✔ Click the Payment button to see a standard PAYMENT details record. Choose the payment type, then specify any additional fields required for that payment type.
- ✔ Click OK to add the PLEDGE to the database.
- ✔ At this point, Sumac asks you to confirm the number of payments and their total value. If they are correct, click Yes. If not, then click No and change the PLEDGE fields to get the correct number and value of the payments.

Link Donations to Pledges

When you use the Pledge module, the donations it creates are automatically connected to the relevant pledge. However, if you have entered donations that need to be connected to or disconnected from a pledge, here is what to do:

- ◆ You can connect a single donation to a pledge by editing the donation, and choosing Link to Pledge from the Links drop-down menu.
- ◆ If a donation is already connected to a pledge when you edit the donation, the Links menu contains a command to *disconnect* the donation from the pledge.
- ◆ If you want to connect several donations to a single pledge, then search in the donations list window to show the donations and search in the pledges list window to show the pledge. Then select and drag the donations from the donations window and drop them on to the pledge.

Process Monthly Pledge Payments

Determine Which Pledges Are To Be Paid

To see which PLEDGES should produce a DONATION in the month:

- ✔ Open the list of PLEDGES.
- ✔ Using the *Due in this year/month* fields in the list of PLEDGES, enter the year and month of interest, then click Search. Usually you should also click *Not processed in this month* to show only the PLEDGES for which you have not already created DONATION and PAYMENT records in the specified month.
- ✔ A list of all the PLEDGES for which you need to process a payment appears.
- ✔ To see which PLEDGES are due on a particular day, click the Day of Month column to sort by day, and type the desired day to scroll to the ones due on that day.

Process Each Payment

Once you have the list of PLEDGES due in the month, examine each one and take whatever actions are necessary to cause the payment to occur (e.g. process a credit card payment). As you process payments, be sure to record a corresponding DONATION in Sumac.

You can cause DONATION and PAYMENT records to be created automatically from PLEDGE records as follows:

- ✔ In the list of PLEDGES, click to select the PLEDGE(S) for which you want to create a DONATION record.
- ✔ Click Special Editing/Process Pledges.
- ✔ You are asked to enter the date for the donations and payments being created. Perhaps you are preparing the data a few days in advance so specify the date when the payments will actually be processed.
- ✔ Confirm that you want to record a DONATION and a PAYMENT for the selected PLEDGE(S). If one of the selected PLEDGES is irregular (i.e. not recurring pay-

ments all of the same amount), then Sumac asks you to specify the amount of the DONATION being made under this irregular PLEDGE.

- ✔ Sumac immediately creates a DONATION and a PAYMENT for each selected PLEDGE.
- ✔ If some of these PAYMENT records are for credit card or bank transfer payments, you should open the PAYMENTS list window, search to find unprocessed payments, and click to process them.

Pledge Renewals

Determine Which Pledges Need Renewing

You can regularly search to find PLEDGES that are about to expire, and therefore, the CONTACT who must be mailed or phoned for renewal.

The list of PLEDGES has a search field labeled *Last payment will be within this many days*. Enter the number of days (perhaps 60, to provide you with enough lead time to get the PLEDGE renewed), then click Search. A list of all the PLEDGES that are about to expire appears.

Update The Pledge

You can easily communicate with each CONTACT whose PLEDGE needs to be renewed. This can be done in Sumac with a letter that is generated by means of a document template and using the Mail Merge button in the PLEDGES list. Alternatively, you can phone each CONTACT to confirm their renewal. For more information on creating document templates, see *Create Document Templates* on page 499.

When you receive the renewed commitment from the CONTACT:

- ◆ if the frequency, amount, and payment method of the recurring payments has not changed, then update the PLEDGE record with a new end date
- ◆ otherwise, create a new PLEDGE record that reflects the new details.

Run A Pledge Program

A PLEDGE is a promise to make a series of payments – usually DONATIONS – in the future. The PLEDGES list has several search options but these ones should be used on a regular basis, probably at least monthly, to manage PLEDGES.

- ◆ Due This Month
- ◆ Last Payment Soon
- ◆ Credit Card Expires Soon

Credit Card Expiry

Search by *Credit Card Expires Soon*: enter the year and month for the upcoming month, and click Search. This shows you PLEDGES whose credit card information is about to expire.

Phone each of the CONTACTS, to get updated credit card information and put this new credit card information in the PLEDGE record.

Pledge Expiry

Search by *Last Payment Soon* and enter a number of days – perhaps 60 – in the field, and click Search. This shows a list of PLEDGES that are about to expire.

PHONE EACH OF THE CONTACTS and confirm that he or she is willing to extend the PLEDGE:

- ◆ If the CONTACT agrees to extend the PLEDGE on the same terms, then the PLEDGE record can be manually edited, entering the new Last Payment Date.

- If the CONTACT agrees to extend the pledge but changes the terms, then a new PLEDGE record, with dates picking up from where the old one leaves off, should be created to reflect the new terms of the PLEDGE.

Collect Pledged Amounts

At the start of each month, do a *Due This Month* search and enter the year and month for the current month in the fields. If some PLEDGE payments dues this month may have been collected already, click *Not processed in this month*. Click Search. Now you have a list of PLEDGES for which you need to obtain payments this month.

Perform whatever actions are necessary to collect a payment based on each of the PLEDGES: cash a cheque, put a charge through on a credit card, etc.

In the PLEDGES list, choose the PLEDGES that have been collected, then click the Process Pledges button. This button causes Sumac to create a DONATION record (with the current date) and, if the Sumac Administrator has indicated it should do so, a PAYMENT record for each of the selected PLEDGES.

If you use Sumac's automated payment processing capability, then you can click the Payments button in the Sumac Console. Click to search for unprocessed payments. Then click the Process button to process them.

Web Integration for Pledges

If you have Sumac web integration, you are able to collect PLEDGES from your donation page. On the donation page, the donor has the option of indicating whether their donation is a monthly gift. The donor can then choose when they would like their pledge to be processed.

The information a donor enters on the webpage information is automatically saved into your Sumac database.

Set Up Web Integration

Only an administrative user can make changes to how Sumac handles PLEDGES submitted through your webpage. To find settings for your pledges web integration, go to Console/Utilities/Customize Database/Preferences/Pledges. In the preferences tab, you can set the following:

- Default campaign for PLEDGES to be linked to
- Default end date for PLEDGES entered online
- Email template for Sumac to send when a PLEDGE is received
- Suggested days of the month for PLEDGES to be processed

> Hint: When a donor makes a pledge, Sumac may and may not process an immediate donation- the first in the pledge. If the pledge is being made less than two weeks after the regular pledge processing date, then the donation is processed immediately.

Products

Introduction

The list of PRODUCTS are used by two different modules: the Sales module, and the Course Registration module. PRODUCTS is where you track and enter items that you have for sale. These can be sold individually, or paired with course registration purchases.

Notes for the Sumac Administrator

Field Preferences

Use the Utilities/Customize Database/Products command in the Sumac console to:

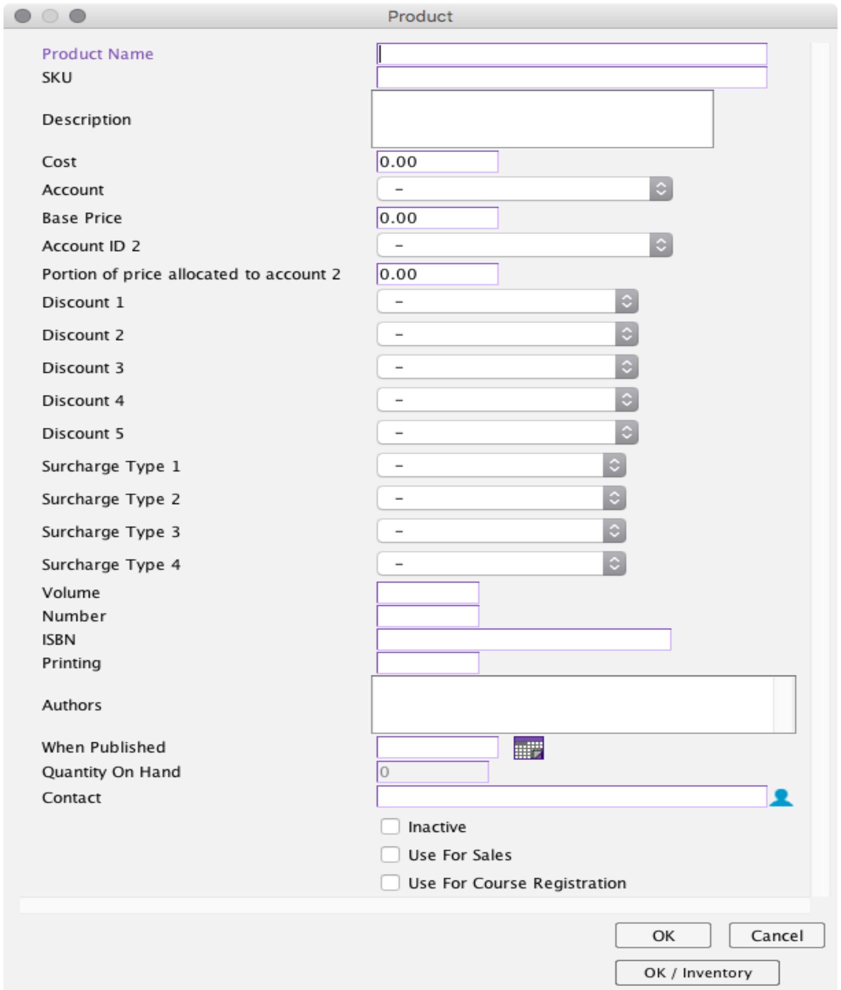
- re-label fields
- completely remove fields from the user interface, or
- make fields mandatory

Product List

To view your PRODUCTS list, go to: Console/Utilities/Customize Database/Products.

Recording a New Product

Click the new button in the PRODUCTS list window.



Specify the product name.

The SKU field can hold a lot of data, so if several SKUs apply to a single product, you can enter all of them.

If you wish to track the cost of the product, then enter it.

Specify the base price. Note that you can specify an account for ledgerizing sales of this product. If you need to split the base price, allocating part of it to a separate account (perhaps for commissions), choose a second account and enter the portion of the price to be allocated to that account.

Choose discounts and surcharges that are applicable to the product. If the product is a book or a number of a magazine, then there are additional fields for specifying details about such published materials. The *Inactive* check box lets you specify that this product can no longer be ordered.

Note the two check boxes: Use For Sales and Use For Course Registration. By default products are available to both of these add-on modules. But you can restrict the product to be use for just one or the other.

Note that you can specify a contact field in a product record. This enables consignment selling, since you can record the consignor in the product record, and find sales based on the consignor.

When you are finished entering a product, you can click OK/Inventory. This is the same as clicking OK – it saves the product into the database – but in addition it takes you straight to the window for entering a new inventory record for that product. This saves time when you need to enter starting inventory for a lot of new products.

If you need to specify a product type, you can enable two drop down fields in Utilities/Customize Database/Field Preferences/Products to indicate product types. One you have enabled these drop down menus, you can add to them in one of two ways. First, within the product record, you can click *New* within the list to add a new entry. Second, you can edit the entries in Utilities/Customize Database/Lookup Lists/ Area: Products/ Lookup List: Product type As and Bs.

Sumac automatically creates an inventory record for all new products.

Product Inventory

Open the product inventory list to view changes in inventory levels of products. This can be done by Utilities/Customize Database/Product Inventory or Specialized/Sales/Utilities/Product Inventory.

In this window you are able to search any single or combination of products in your database. Sumac brings up a list of inventory entries for that product. Whenever the product is sold or returned in the Sales or Course Registration modules, Sumac records changes here and automatically calculates the QOH.

Click new to create a new entry for inventory adjustment. Here you are able to choose the product, link it to a contact and enter relevant notes for the inventory adjustment.

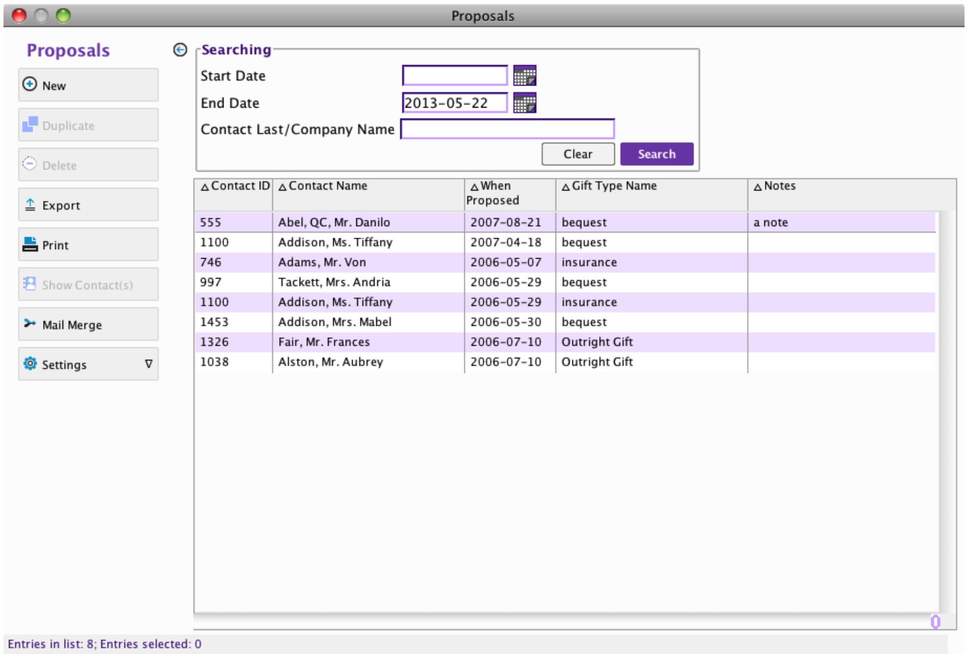
From this window you are able to export, print, or analyze and report on inventory data using the buttons along the side.

Proposals

Introduction

Sumac supports generation and tracking of sophisticated proposals for (potential) large gifts.

The Proposals List



Searching

Search Criteria	*What Is Found*
Start date	Find proposals that occurred on or after this date.
End date	Find proposals that occurred on or before this date.
Contact Last/Company Name	Find proposals to contacts whose last name starts with the entered text.

Buttons

Show Contact(s) Button

Click to select a proposal. Then click this button to see the details about the contact for whom you are making the proposal. If more than one contact is identified by the selected records, then this button brings the contacts list to the front and shows the selected contacts.

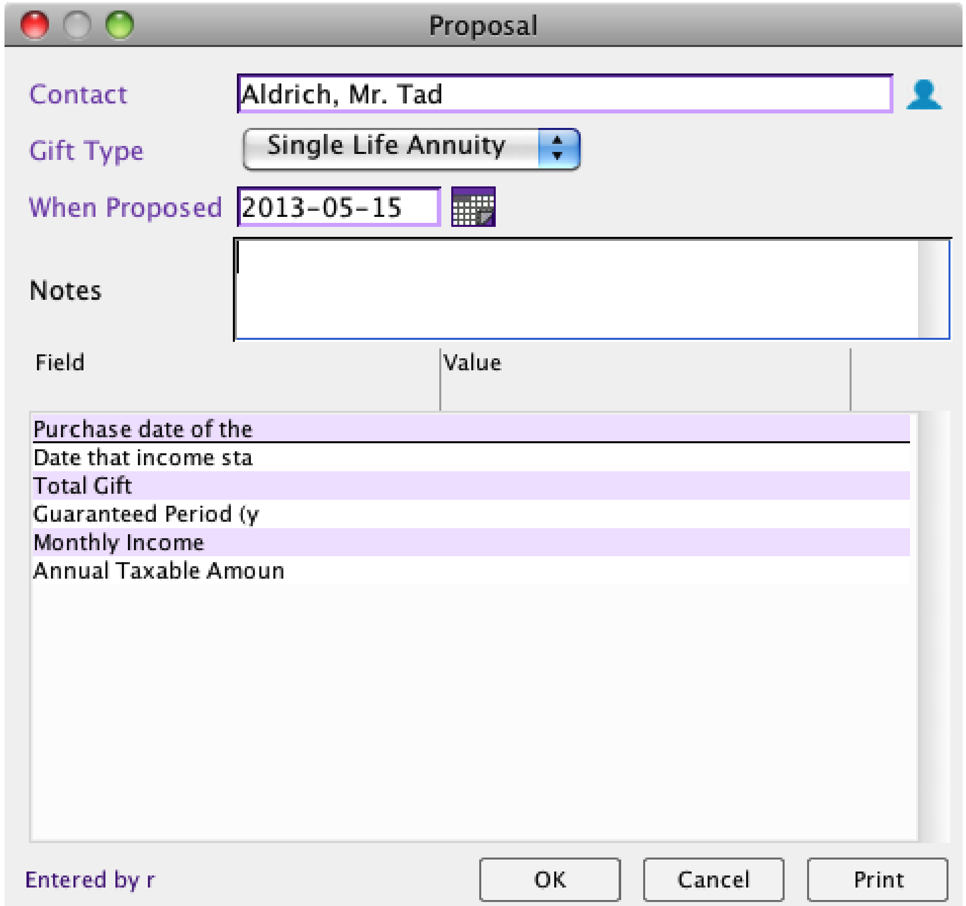
Mail Merge Button

For further information, see *Mail Merge* on page 479.

Enter Proposals

Here is how you record a proposal:

- ✔ Show the Proposals list.
- ✔ Click the New button. This dialog appears:



- ✔ Click to choose the Contact who is the potential donor for the proposal.
- ✔ Choose the Gift Type. When you specify a gift type, the scrolling list of fields is filled in with a list of facts that need to be gathered in order to make a proposal for the specified type of gift.
- ✔ Specify the date when you are going to make the proposal to the Contact.
- ✔ Fill in the values of the listed fields. Do this by clicking in the Value column beside each field name, and entering the required information.

Prospect Rating

Introduction

Prospect rating is a way to examine data in your Sumac database. After performing large numbers of calculations, Sumac ultimately provides a single percentile score for every CONTACT in the database. Depending on how you set up the calculations, to weight some factors more or less than others, you can find prospects for different purposes like:

- prospective candidates for a moves management effort to increase their DONATIONS
- prospective donors for a capital campaign
- prospective board members
- prospective volunteers

Prospect rating assesses each contact on five aspects of their relationship to your organization:

Commitment	the CONTACT's commitment to and involvement with your organization
Concern	the CONTACT's concern about your organization's cause
Giving	the CONTACT's demonstrated ability to make financial contributions to your organization
Capacity	the CONTACT's ability to make donations based on facts known about the CONTACT: planned gifts, gifts to other organizations, and assets
Network	the extent to which a the CONTACT knows other people, based on the number of CONTACTS that the particular contact is related to

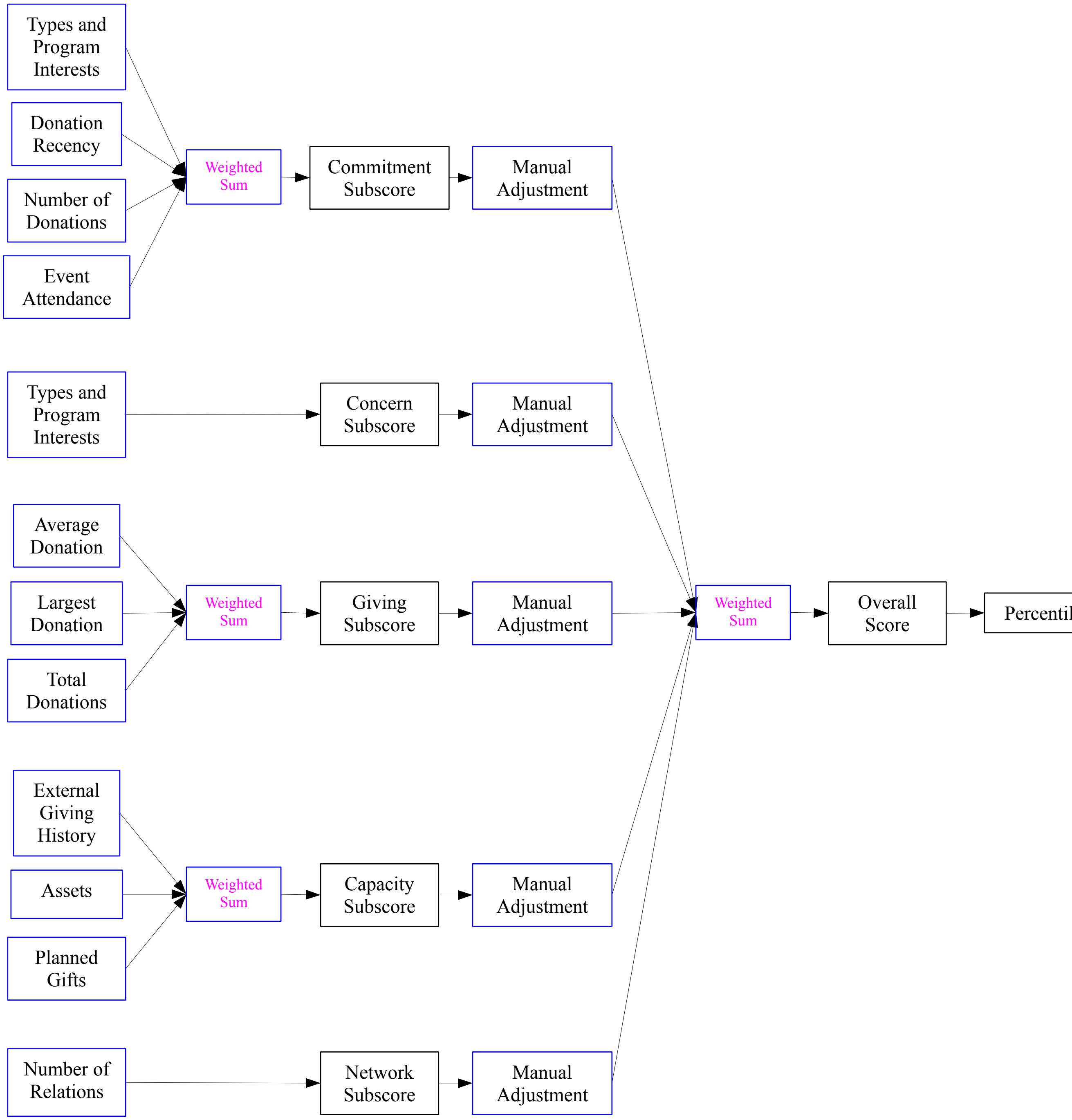
Depending on what sort of prospects you are seeking, you adjust the weights of these five factors. For example, if you are trying to find likely volunteers to work with your organization, financial capacity is not relevant, but concern and commitment are important. Similarly, if you are looking for a donation of $100,000, giving and capacity should be heavily weighted.

Since you may be looking for prospective donors at the same time as you are looking for prospective volunteers, Sumac allows you to simultaneously define and use as many different prospect ratings as you want. Each is calculated independently of the others and can be reviewed separately or at the same time as other ratings.

How It Works

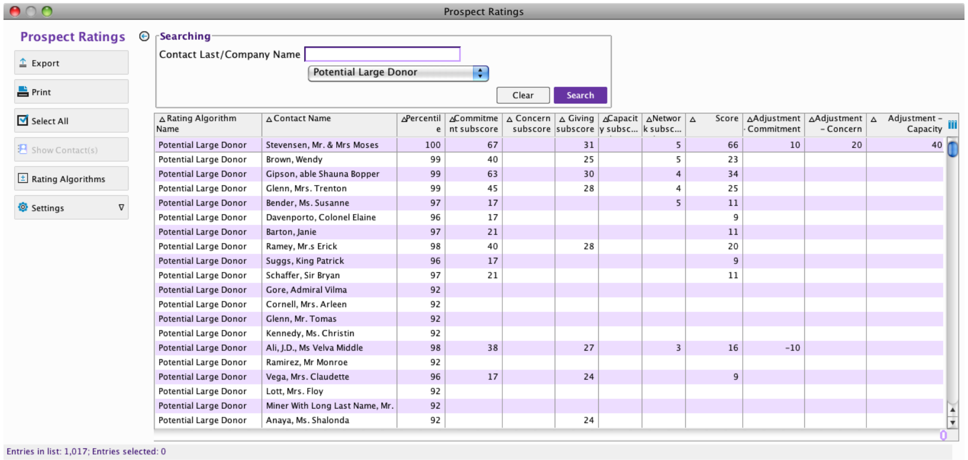
This diagram indicates how Sumac calculates prospect ratings. The calculation proceeds from left to right:

- ✔ Data from the Sumac database is gathered and summarized.
- ✔ Sumac applies your weights to produce subscores for each of the major areas.
- ✔ You can manually adjust the subscores for any particular CONTACTS if you know something about the contacts that Sumac doesn't know.
- ✔ Sumac produces an overall score from the subscores, and your adjustments and weights. The overall score is converted to a percentile.



The Prospect Ratings List

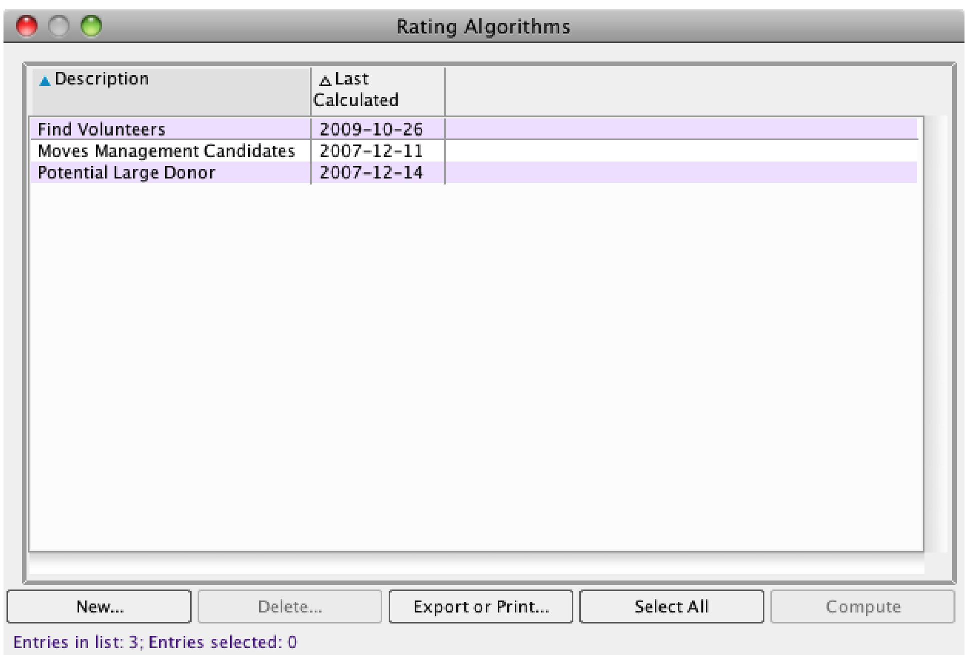
Click the Prospect Ratings button in the Sumac console to get this window:



It shows a list of ratings calculated for a particular algorithm.

Before any ratings can be calculated, you must define and calculate at least one rating algorithm. Here is how to do this:

- ✔ Click the Rating Algorithms button in the prospect ratings list. This presents a list of rating algorithms that have been defined.



- ✔ Click the New button and define a new rating algorithm. For further information, see *Define A Rating Algorithm* on page 312.
- ✔ Once you have defined the rating algorithm, it appears in the rating algorithms list. Click to select it, then click the Compute button. This causes Sumac to calculate prospect ratings based on the algorithm you have defined.
- ✔ Close the rating algorithms list window.

- ✔ In the Searching area of the prospect ratings list window, choose the rating algorithm whose results you want to see. Click the Search button.
- ✔ Sumac then shows you the prospect ratings it has calculated.

Buttons

New and Delete Buttons

These buttons are always disabled because prospect rating records are created automatically by the Compute button in the prospect ratings list, and are deleted when their rating algorithm is deleted.

Show Contact(s) Button

Click to choose a single prospect rating, then click the Show Contact(s) button to see the record for the contact. If more than one CONTACT is identified by the selected records, then this button brings the CONTACTS list to the front and shows the selected CONTACTS.

Rating Algorithms Button

Click this button to see a list of the rating algorithms and when they were last calculated. Define new rating algorithms, and re-compute existing ones.

Define A Rating Algorithm

First you must define a rating algorithm – a set of steps used to perform a calculation.

You get the list of rating algorithms by clicking the Rating Algorithms button in the Prospect Ratings list. To create a new rating algorithm, click the New button in the rating algorithms list.

By defining a rating algorithm, you are telling Sumac how you want it to calculate the scores that lead to a rating. A higher score indicates that the contact is a better prospect, perhaps more likely to be able and willing to donate to your organization. The score is derived by following these steps:

- ✔ Sumac extracts from the database information about:
    - contact types
    - program interests
    - event attendance
    - donations
    - facts of these types: giving history, asset, and known planned gift
    - relations between all contacts

  and uses this information to produce subscores for each of commitment, concern, giving, capacity, and network.
- ✔ These five subscores are then adjusted by any manually entered adjustments you may have made.
- ✔ The adjusted subscores are then weighted and added together to get an overall score.
- ✔ The overall scores for all contacts are then sorted and Sumac calculates percentile rankings.

Overall Score

The Overall Score is a weighted total of the contact's commitment, concern, giving, capacity, and network subscores. It is calculated by adding together these five numbers:

- ◆ (Commitment Subscore + Commitment Adjustment) × Commitment Weight

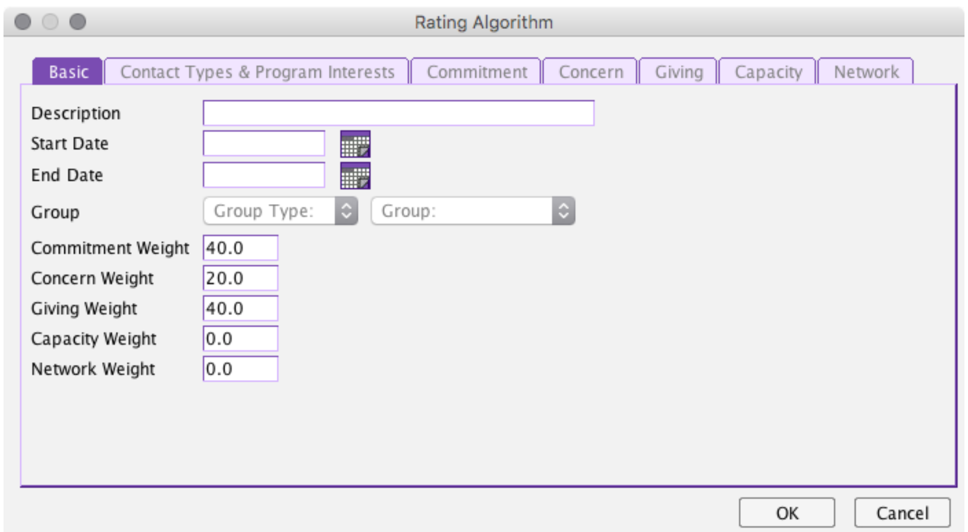
- (Concern Subscore + Concern Adjustment) × Concern Weight
- (Giving Subscore + Giving Adjustment) × Giving Weight
- (Capacity Subscore + Capacity Adjustment) × Capacity Weight
- (Network Subscore + Network Adjustment) × Network Weight

You specify the adjustments and the weights. The five *weights* must add up to 100. They are entered in the Basic tab of a rating algorithms. The *adjustments* are entered in the prospect rating record for each contact. Note that these records do not exist until you have computed the algorithm for the first time.

Percentile

The ultimate summary number is a percentile. This is a number from 0 to 100. It indicates which percentage of the list of contacts has an Overall Score that is higher or lower. For example, if a contact has a percentile of 70, this means that her Overall Score is lower than 30% of your contacts and higher than 70% of your contacts. The best prospects have high percentile numbers.

Basic Algorithm Information



The description should briefly indicate what this rating algorithm is for: for finding large donors, for identifying potential volunteers, etc.

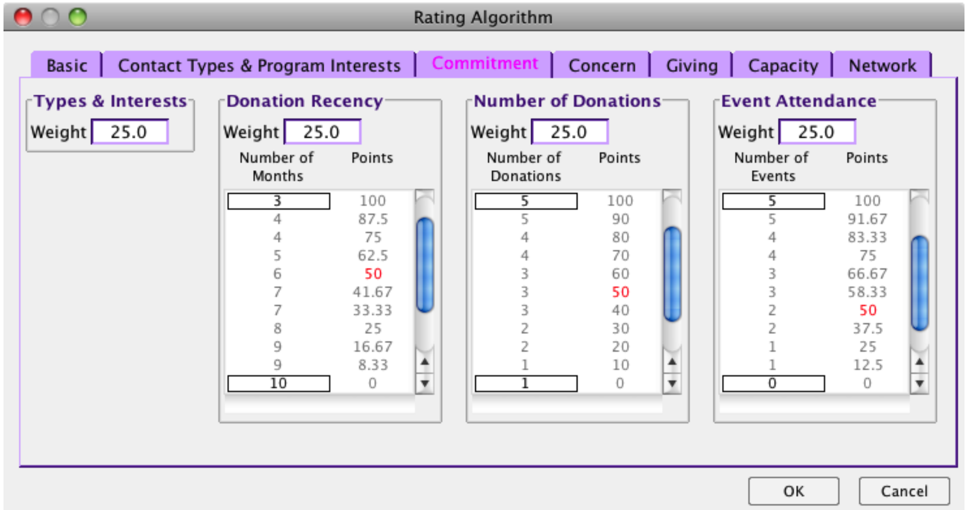
The date range indicates which donations and event attendance information should be considered in doing the calculations. Both dates are optional. If the start date is omitted, Sumac uses data back to the beginning, if the end date is omitted then Sumac uses data up to the most recent.

If you want to restrict the ratings to only contacts in a specific group, choose the relevant group.

The weights are described above (see *Define A Rating Algorithm* on page 312).

Commitment Subscore

The Commitment Subscore evaluates the extent to which a contact is committed to your organization. It is calculated using rules defined in the Commitment tab:



The Commitment Subscore consists of a weighted sum of four components:

- The contact's types and expressed program interests.
- The recency of the contact's most recent donation.
- The number of donations the contact has made in the period.
- The number of events the contact has attended in the period.

It is calculated as the sum of these four numbers:

Types & Interests Weight × Types & Interests Points
Donation Recency Weight × Donation Recency Points
Number of Donations Weight × Number of Donations Points
Event Attendance Weight × Event Attendance Points

Weights

Enter a weight to be applied to each of the four components. If your Sumac database does not contain information about one of the components (e.g. event attendance) then set that component's weight to zero, so that it will not influence the outcome. The four weights must add up to 100. The points are calculated as defined in the following sections.

Types & Interests Points

The points for this factor come from the Contact Types & Program Interests tab. On that tab, you can specify how many commitment points should be given to a contact for each contact type and program interest. See *Contact Types & Program Interests* on page 317.

Donation Recency Points

How many months is it since the CONTACT's last DONATION? The smaller the number of months, the more points a CONTACT gets for this factor. 100 points are earned if the CONTACT made a DONATION within the number of months specified. If more than the maximum number of months have passed since the CONTACT made a DONATION, then no points are earned. In-between, Sumac assigns different numbers of points depending on the actual number of months since a DONATION was made. It also adjust the points based on how you have positioned the red 50: closer to the top to weight more recent DONATIONS more heavily, closer to the bottom to increase the number of points for DONATIONS made longer ago.

Number of Donations Points

Specify points for a CONTACT based on the number of DONATIONS the CONTACT has made in the relevant time period – a larger number of DONATIONS gets more points.

Event Attendance Points

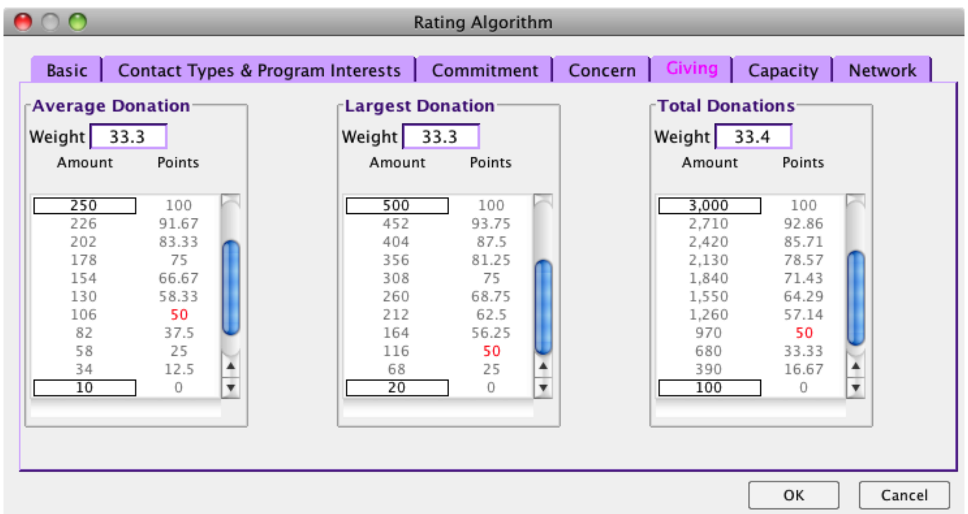
Specify points for a CONTACT based on the number of events the CONTACT has attended in the relevant time period – a larger number of attendance records gets more points.

Concern Subscore

The Concern Subscore evaluates the extent to which a CONTACT is concerned about your organization's cause or mission. The Concern Subscore comes entirely from values entered in the Contact Types & Program Interests tab. See *Contact Types & Program Interests* on page 317.

Giving Subscore

The Giving Subscore evaluates a CONTACT's giving history.



It consists of a weighted sum of three currency amounts:

- The CONTACT's average donation in the period.
- The CONTACT's largest donation in the period.
- The CONTACT's total donations in the period.

In the Capacity tab you specify how points from 0 to 100 are assigned to each of these three components, and also specify the relative weights of these three components.

It is calculated as the sum of these three numbers:

Average Donation Weight × Average Donation Points
Largest Donation Weight × Largest Donation Points
Total Donations Weight × Total Donations Points

The three weights must add up to 100. Remember that you can set a weight to zero if you want to exclude a factor from consideration.

Up to 100 Giving points can be given to a CONTACT based on each of the three components. The points are calculated as defined in the following sections.

Average Donation Points

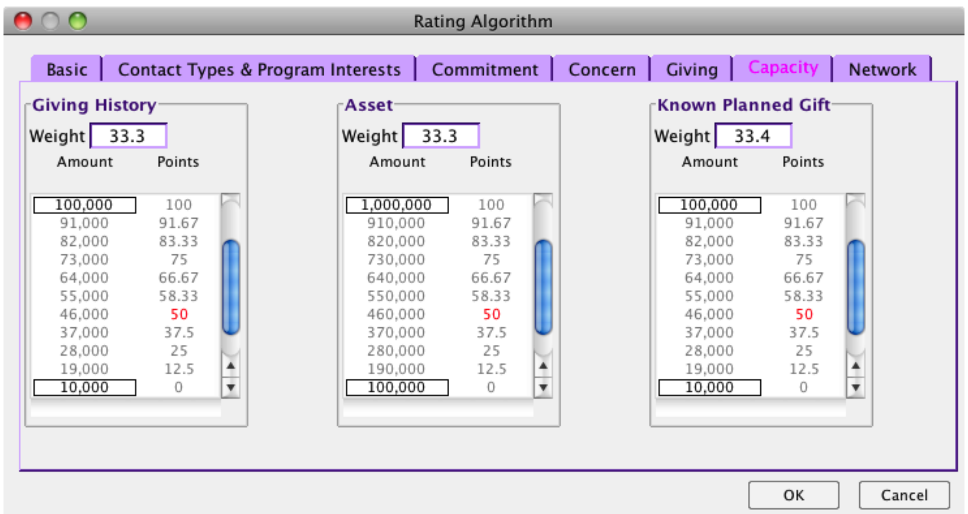
When entering the values for average donation, keep in mind possible interaction with a monthly giving or other pledge program and how that might lower average donation size but significantly increase total donations.

Largest and Total Donation Points

Adjust the number of points to be awarded for the largest donation in the time period and the total of all donations in the time period. Make sure that the values you enter are appropriate for ranking and identifying contacts who can make donations of the size you seek. For example, if you seek people to make very large donations (e.g. $100,000), then you should use larger numbers for these two factors than if you are looking for relatively modest donations (e.g. $1000).

Capacity

Capacity indicates the ability of a contact to make a donation.



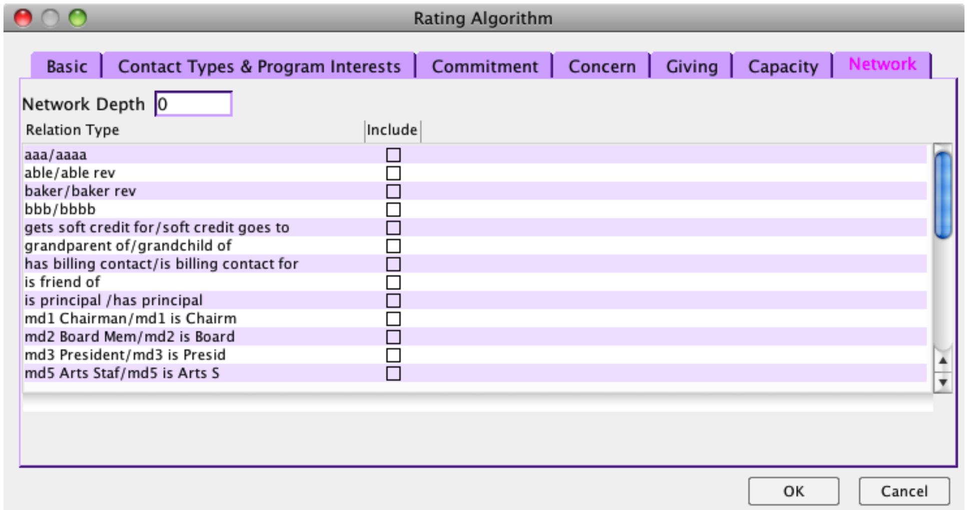
Capacity is based on facts that have been entered in the Facts tab of each contact. Three types of facts are used:

- Giving History
- Asset
- Known Planned Gifts

For each of these types of facts, you can specify what financial level earns 100 points, what level gets zero points, and use the sliders to indicate what level is 50 points.

Network

The network score is an indication of how the extent of a CONTACT's network of associated CONTACTS.



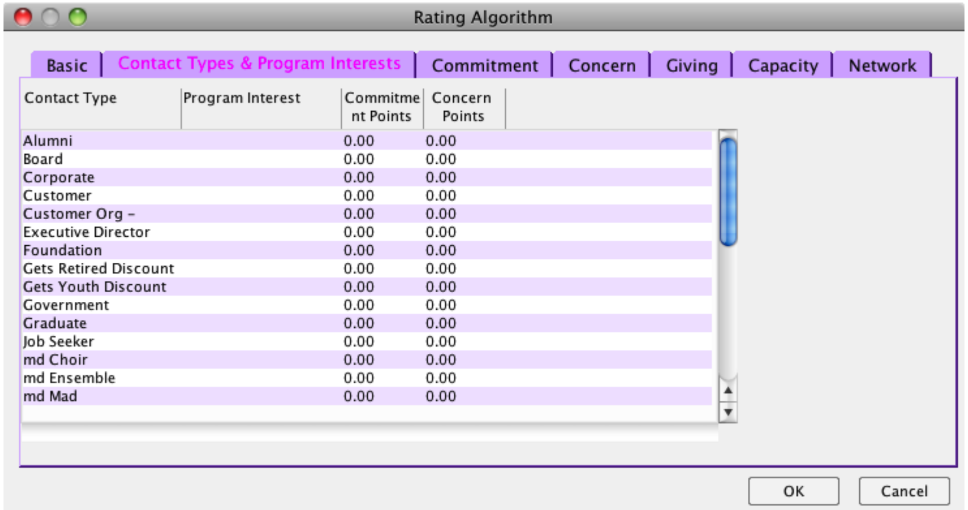
A CONTACT who is widely connected may be a better prospect, perhaps for a board position, than one who is less well connected. You can tell Sumac how to calculate the network subscore by specifying two things:

- ✔ Indicate the network depth that should be calculated. The network depth is how many levels removed the CONTACT is from related CONTACTS. A level of 1 means that Sumac should count only those CONTACTS who are directly related to the CONTACT being scored. A network depth of 2 tells Sumac to count the people directly connected to the CONTACT being scored and also to count the CONTACTS connected to those CONTACTS. Network depth should be at least 1 and probably no more than 2 or 3.
- ✔ Indicate which relation types should be counted for the purposes of this score. Click the check box for each relation that you want counted.

Contact Types & Program Interests

Contact types are recorded in the Basic and Membership tabs of each CONTACT's record. Program interests are recorded in the Facts tab of each contact's record.

Sumac can use contact types and program interests to calculate part of the Commitment subscore and also to calculate the Concern subscore.



Beside each Contact Type or Program Interest that signifies commitment to your organization or concern about its cause, enter the number of points that the particular type or interest should add to the CONTACT's commitment or concern score.

Reminders

Introduction

Overview

Sumac can assist you in managing and planning activities involving interaction with CONTACTS:

- REMINDERS support scheduling of meetings at specific times, and also check-lists of things that need to be done.
- You can set up action plans which provide a set of standard actions to be performed in a structured sequence of activities.
- REMINDERS can be created by following the sequence of actions in an action plan, or entered *ad hoc*.
- Action steps in action plans can use standard document templates chosen from a lookup list.
- Each time Sumac starts, if there are incomplete REMINDERS for you, the REMINDERS list window is displayed.

Types of Reminders

REMINDERS are used to indicate to-do items. Although any REMINDER can be managed like any other, you can keep track of three basic types of to-do items using Sumac Reminders:

Type of Reminder	*Description*
basic REMINDER	An indication of a task that needs to be performed by a certain time.
action plan progress	Like a basic REMINDER, except that it indicates an action step within a pre-configured action plan. This type of REMINDER can be seen as progressing through, and checking off, items in the action plan as they are completed.
meeting	Reminds you to attend a meeting at a specific time and place.

Associated With a Contact

Each REMINDER is associated with a CONTACT. When you expand a CONTACT in the CONTACTS list, you can see each REMINDER associated with the CONTACT.

Notes for the Sumac Administrator

Field Preferences

Use the Utilities/Customize Database/Field Preferences command in the Sumac console to:

- re-label fields
- completely remove fields from the user interface
- make fields mandatory, or
- determine which fields should appear on a website.

in Reminders.

Preferences

Use the Utilities/Customize Database/Preferences command in the Sumac console to get the Preferences dialog. Click the Reminders tab.

Sharing Reminders

You can set check box to specify that users should be allowed to see and change REMINDERS for other users as well as for themselves.

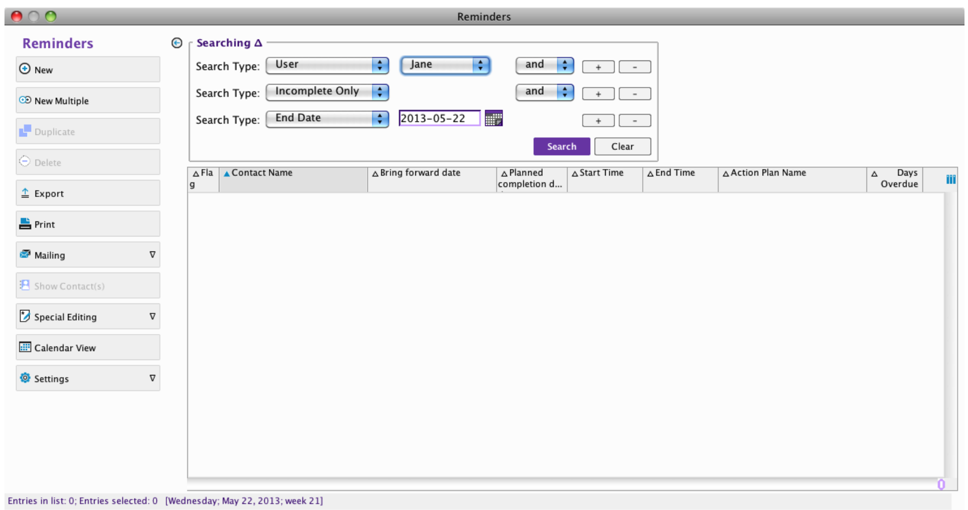
Reminders In Contact History Tab

Sumac displays incomplete reminders in the history tab of the window for editing and viewing a contact. You can set a check box to specify that the history tab should also show complete reminders.

Automating Reminders

Action Plans (see page 597) allow you to define checklists of steps to be performed with a reminder, and also allow a level of automatic processing.

The Reminders List



Flag

This column provides you with a way to group the REMINDERS you want to work on. You click to turn the flag on and off. For example, at the start of your day, you may select several REMINDERS which require phone calls, turn on their flags to indicate that you are going to work on them, then proceed to do them, one after another, turning off their flags as you complete the tasks.

Searching

When you first open the REMINDERS list, the search criteria are set up to find incomplete REMINDERS for the current user (you) that have bring forward dates before or up to the current date. If you just click the Search button (or press the Enter key), this already set-up search shows the REMINDERS you probably want to see.

Search Criteria	*What Is Found*
Starting Date	REMINDERS whose bring forward date is on or after this date.

Search Criteria	*What Is Found*
End Date	REMINDERS whose bring forward date is on or before this date.
When Created	REMINDERS created in a specified date range
Completion Status	Find REMINDERS with a specific completion status (completed or incomplete).
Contact Name	REMINDERS for CONTACTS whose last names start with the characters typed into this field.
Action Plan	All REMINDERS created using a specific action plan.
What To Do	Find REMINDERS with the specified text in the what-to-do field.
User	Only REMINDERS for the chosen user.
Event	Find REMINDERS relating to a chosen event.
Event Group	Find REMINDERS relating to a chosen group of events.
Campaign	REMINDERS that are related to the chosen CAMPAIGN.
Status	Find REMINDERS with a specified status.

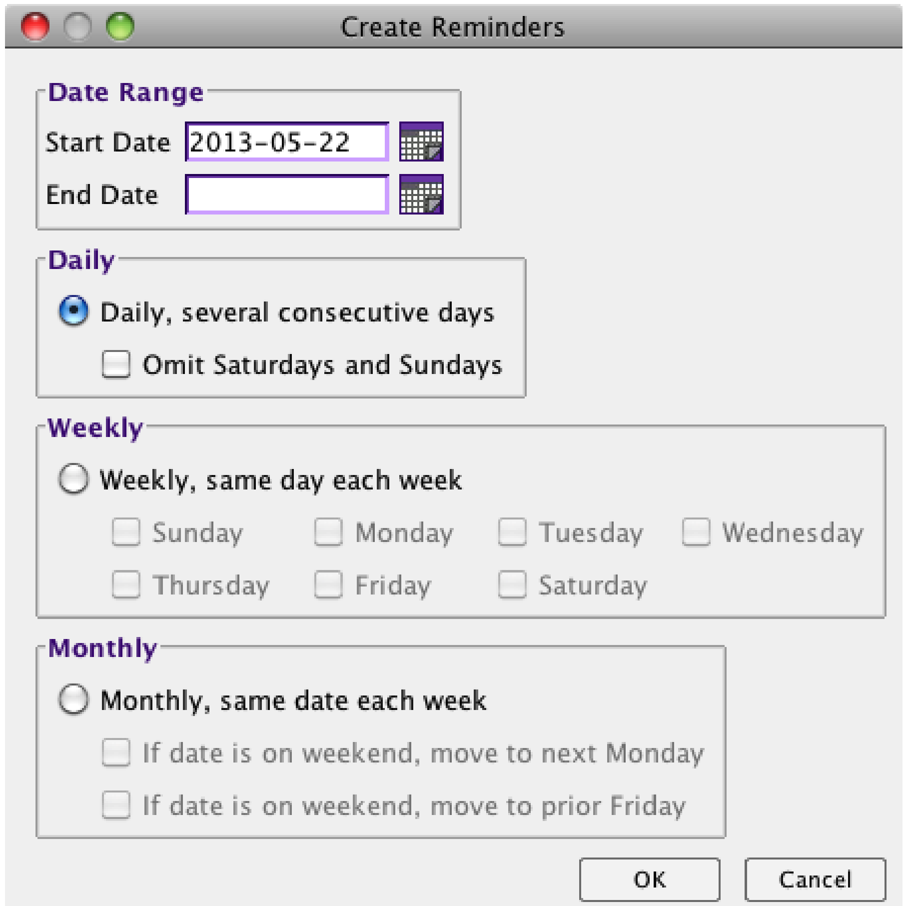
Note that if you only want to find reminders for a particular group of contacts, you can choose the group of interest.

Once you have specified the search criteria, click Search to cause the desired REMINDERS to be found, and displayed in the REMINDERS list.

Buttons

New Multiple Button

Click this button to create many reminders at once, based on repeating dates, e.g. consecutive days, repeating each week, or the same date each month. When you click the button, this window appears:



Specify which dates apply for the reminders to be created, then click OK. Sumac then prompts you to enter the details of the reminders to be created.

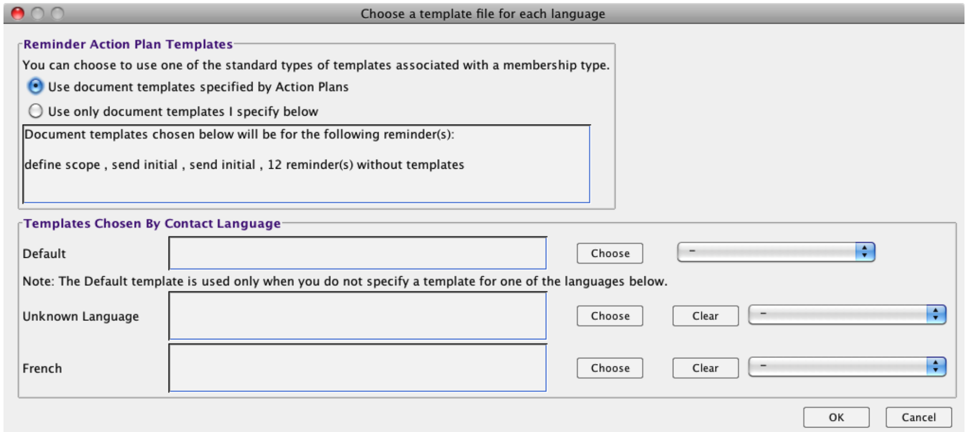
Show Contact(s) Button

Click to select a reminder. Then click this button to see the details about the contact associated with the reminder If more than one contact is identified by the selected records, then this button brings the contacts list to the front and shows the selected contacts.

Mail Merge Button

Mail merge for reminders proceeds much like a generic mail merge. See *Mail Merge* on page 479.

However, some reminders are based on action plans, and the individual action associated with the reminder specifies a template to be used for Mail Merge operations. So when you do a Mail Merge from the reminders list, you are asked if you want the (possibly present) document templates associated with a reminder to be used instead of the ones you choose using the standard template selection dialogs:



Export To Calendar Button and Import From Calendar Button

Sumac Reminders integrates with other calendars (e.g. Outlook, Google Calendar, iCal). This is done by exporting and importing calendar entries using the standard .ics file format.

Select Complete Steps Button

The Select Complete Steps command finds all reminders in the list:

- whose bring forward date has passed
- which use action plans, and
- whose current step is flagged to complete when bring-forward date passes.

This button is usually used before the Mark Step Completed: you identify which reminders to mark, then mark them.

Complete Steps Button

The Complete Steps command marks the current step in all selected reminders as completed, then moves each reminder on to the next step. If the current step specifies things to do (e.g. send an email), then Sumac does them before moving to the next step.

Mark Step Completed

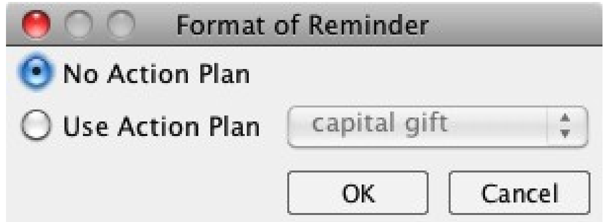
If a reminder is using an action plan, click this button to mark its current step as completed, move it to the next step, and change its bring-forward date.

Calendar View Button

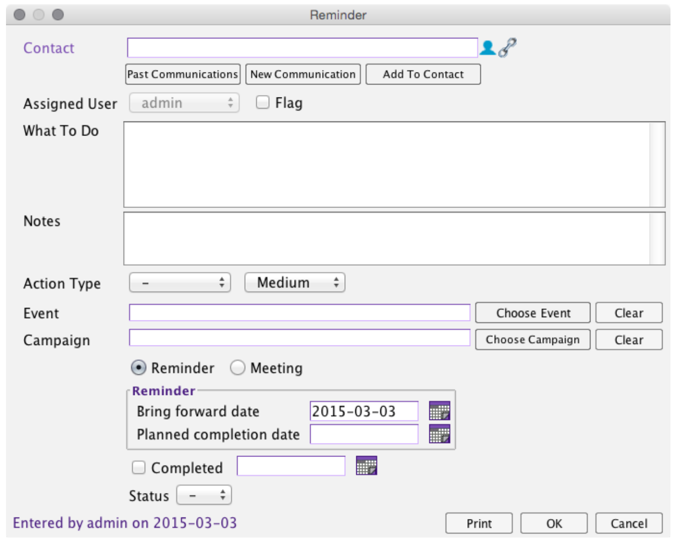
Click this button to see reminders in a calendar format. You can change between day, week, and month views. You can also filter the view to show only reminders for selected users or selected action plans.

Enter Reminders

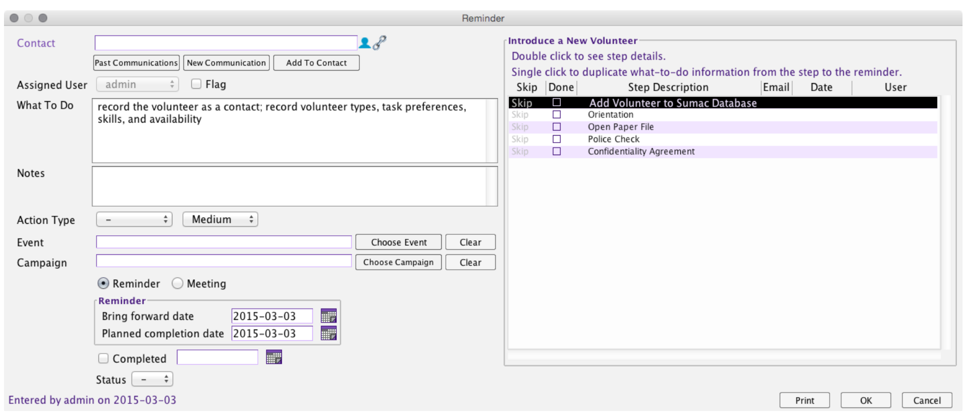
When you click the New button in the REMINDERS list, this window appears:



If you choose to create a REMINDER without using an action plan, then this dialog appears:



If you want to create a reminder using an action plan, then click the Use Action Plan radio button, choose from the drop-down menu which action plan you want to use. The resulting REMINDER looks like this:



There is a scrolling list of steps, taken from the action plan, at the right hand side. When you click the check box on one of the steps, to indicate it is complete, its completion date is automatically entered.

For all types of REMINDER, you fill in the fields as follows:

- ✔ First identify the CONTACT that this REMINDER relates to.
- ✔ Underneath the field showing the CONTACT's name are two buttons: Past Communications and New Communication.
  - Past Communications shows COMMUNICATIONS with the CONTACT.

- If you have performed activities relevant to this REMINDER, perhaps making a phone call, then click New Communication, and enter a COMMUNICATION record.

✔ If this REMINDER is for a different user other than yourself, then use the drop-down menu to identify the other user.

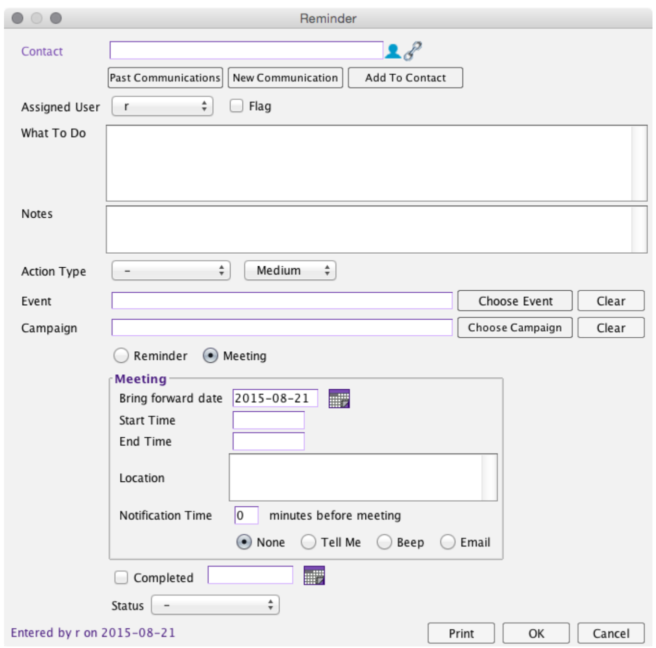
✔ What To Do indicates what you plan to do for this REMINDER.

✔ If the REMINDER shows the steps in an action plan, then you can:
- Click a completion check box to indicate that one of the checklist items is completed. Click directly on the date if you want to change it.
- Click elsewhere in a step to show its What To Do information.
- Double click the step to see details describing what is to be done.

✔ Use drop-down menus to choose the type of action to be performed, and the priority.

✔ If the REMINDER is associated with a CAMPAIGN, then choose the CAMPAIGN from the drop-down menu.

✔ Now click one of the radio buttons to indicate whether this REMINDER is a Reminder of some action to be performed, or is a scheduled Meeting. If you choose Reminder, the dialog looks like the pictures above. If you choose Meeting, then it changes to this appearance:



✔ If you want to be notified when a meeting is about to happen, you can specify how many minutes in advance of the meeting you want to be notified, and the type of notification desired:
- Tell Me: a message appearing in a window on your screen
  Beep: a distinctive sequence of beep sounds
- Email: an email (sent to an email address that you specify).

✔ Enter Reminder details:
- Bring Forward Date: when the REMINDER should appear in your list of things to do
- Planned Completion Date: when you expect to complete this activity

✔ Alternatively, enter Meeting details:

- Bring Forward Date: when the meeting will occur
- Start Time: when the meeting is expected to begin
- End Time: when the meeting is expected to end
- Location: where the meeting is taking place

✔ If you have performed the actions necessary to finish the REMINDER, click the Completed check box. The completion date fills in beside it.

Complete A Reminder

Once you have finished the activities described by a REMINDER, here are some things to do:

✔ In the REMINDERS list, double click the REMINDER. Click the New Communication button, and create a COMMUNICATION record that indicates the final activity that occurred.

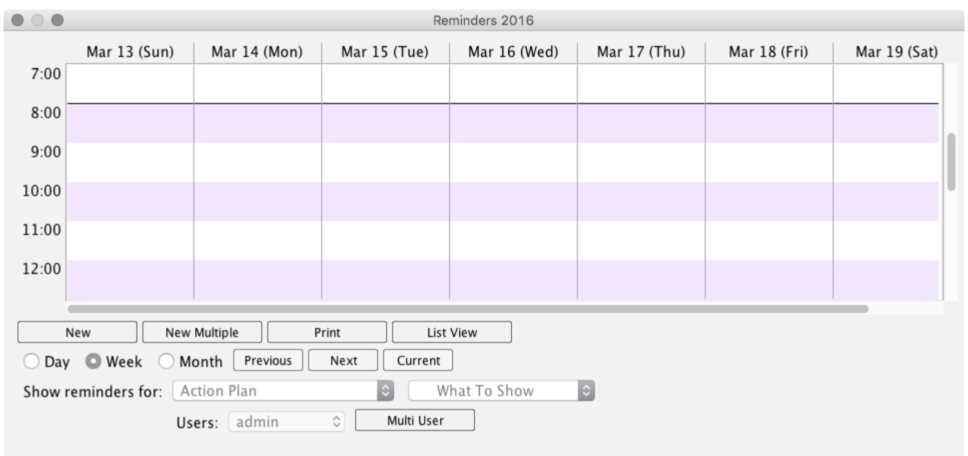
✔ If you are going to keep (i.e. not delete) the REMINDER, click its Completed check box, then click OK and save it into the database. If you intend to delete the REMINDER, then after you have created a COMMUNICATION record, click the REMINDER'S Cancel button.

✔ If you do not keep completed REMINDERS, then click to select the REMINDER, and click the Delete button to discard the REMINDER.

Reminders in a Calendar View

Showing the Calendar View

Click the Calendar View button in the reminders list to see a calendar view of the reminders.



Which Reminders Are Displayed

When you start the calendar view, it looks at the search criteria in the reminders list to see which user's reminders are being displayed. It then shows only the reminders for that user.

You can tell Sumac to show reminders for any single user by choosing the user from the drop-down menu at the bottom of the window. Alternatively, to show reminders for several users at once, click the Multi User button and select the users of interest.

It shows appointments in their appropriate date and time slots. It shows reminders in the 6:00 a.m. slot based on their bring forward dates.

Entries that are dim (grey) are completed, reminders in black are yet to be performed. Entries showing in colour are appointments: dark colour for the current date, lighter colour for other dates.

Note the green bar down the left side of the cells under the appointment in the above calendar. This bar indicates that the appointment continues through the cells below it.

Navigating in the Reminders Calendar

The Reminders Calendar starts in a Week view, but you can click radio buttons to change it to show Day and Month views. You can also click row and column titles to move from one view to another. Clickable titles have a shaded appearance like a button.

Current View	*Click Row Title*	*Click Column Title*
Day	–	Month view
Week	Week view	–
Month	–	Day view

A single click on a reminder opens it for editing. If the cell that was clicked contains more than one reminder, then you are asked which one you want to edit.

Buttons

Button	*Function*
New	create a new reminder
New Multiple	create several new reminders on a range of dates, for multiple users
Print	prints the view that is on the screen
List View	switch to the reminders list window
Day	switch to day view
Week	switch to week view
Month	switch to month view
Previous and Next	move forward and backward a day, week, or month
Current	jump to the current day, week, or month

Drop-Down Menus

Button	*Function*
Action Plan	show only reminders related to the specified action plan
User ID	choose which user's reminders to show
What To Show	click to show reminders, meetings, or both

Sales

Introduction

The sales feature enables you to create a list of products or services, then take orders for the products.

Notes for the Sumac Administrator

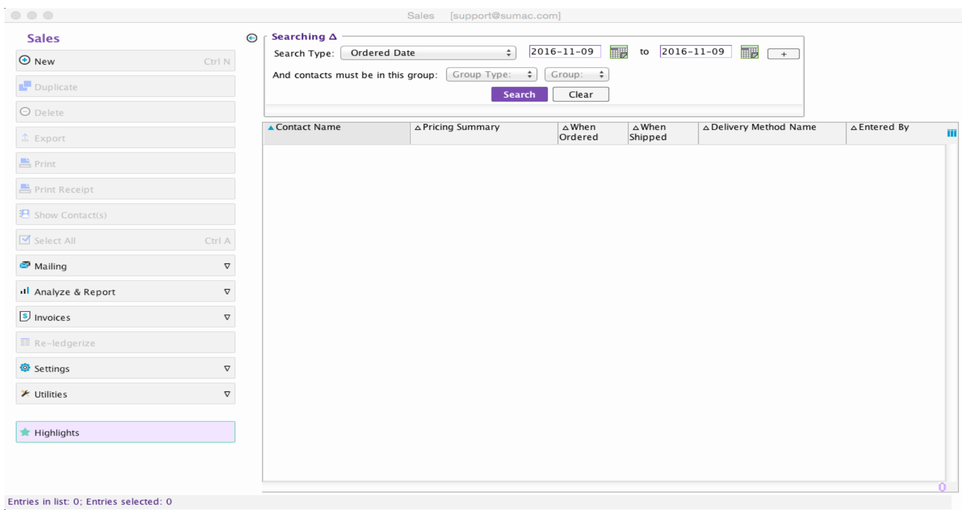
Field Preferences

Use the Utilities/Customize Database/Field Preferences command in the Sumac console to:

- re-label fields
- completely remove fields from the user interface
- make fields mandatory, or
- determine which fields should appear on a website.

in Sales records.

The Sales List



Searching

Search Criteria	*What Is Found*
Ordered Date	Find SALES that were ordered in this date range. You may specify either or both of the dates.
Shipped Date	Find SALES that were shipped in this date range. You may specify either or both of the dates.
Contact	Find SALES to a particular contact.
Contact Last/Company Name	Find SALES to CONTACTS whose last name starts with the entered text.
Order is paid	Find SALES that are or are not paid.
Product	Show SALES of a particular product.
Product Contact	Show SALES to a particular CONTACT.
Surcharge	Find SALES to which a particular surcharge has been applied.

Search Criteria	*What Is Found*
Delivery Method	Find SALES that are to be delivered using the delivery method chosen from the drop-down menu.
Discount	Show the SALES with a particular discount applied.
Sales ID	Find SALES based on their ID number.

If you specify more than one search criterion, then all criteria are used. For example, you can find SALES after a date that are to be delivered by a certain delivery method.

Buttons

Show Contact(s) Button

Click to select a SALE. Then click this button to see the details about the CONTACT for the selected SALE. If more than one CONTACT is identified by the selected records, then this button brings the CONTACTS list to the front and shows the selected CONTACTS.

Labels/Envelopes Button

For further information, see *Labels, Envelopes, and Name Tags* on page 469.

Mail Merge Button

You can produce one or more new documents – e.g. a thank-you letter, invitation, renewal notice, or receipt – by merging data from the database, with a document template file that you have previously created (see *Create Document Templates* on page 499). For details on how to do merge operations, see *Mail Merge* on page 479.

Invoices

Shows invoices created from within the SALES list, as well as invoices created from outside of the SALES list that included sales. For more on invoices see *Invoices* on page 237.

Re-ledgerize

Search to find SALES that need to be re-ledgerized. Then click this button. Sumac re-generates the ledger entries for the selected SALES. This command enables you to fix systematic SALES entry errors.

Utilities

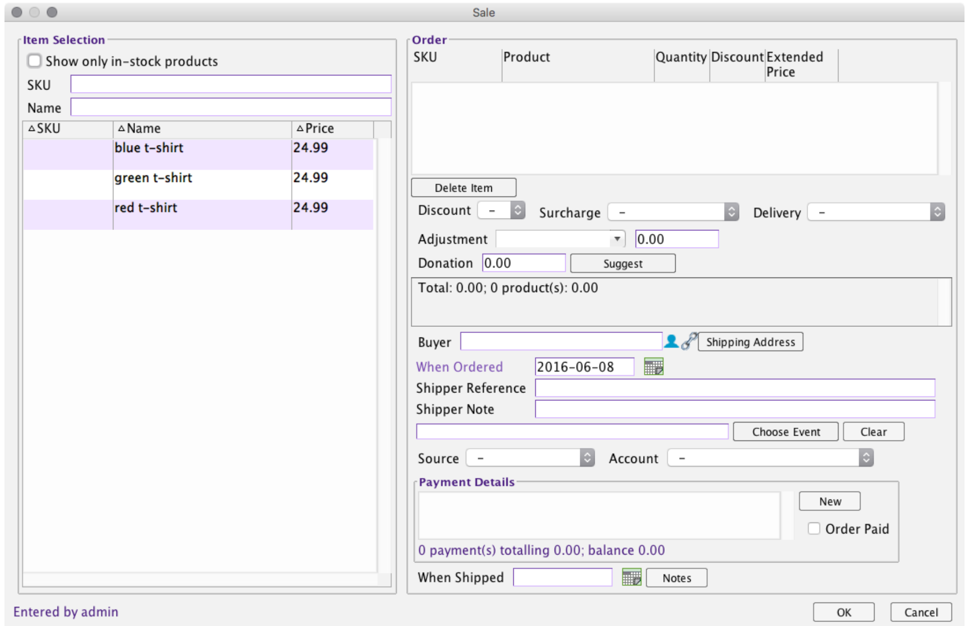
Access product list and product inventory records from within the SALES list window

Enter Sales

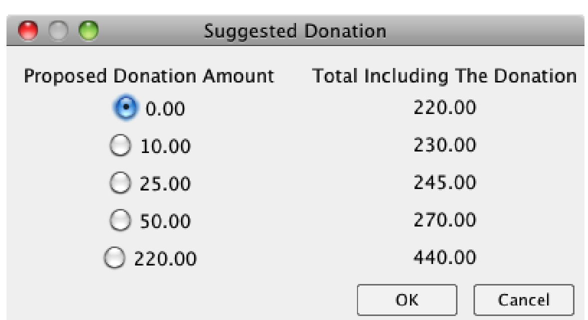
There are two ways to create a SALE:

- in the SALES list window, click the New button
- in the CONTACTS list window, select a contact, click Add To Contact, then choose Sale

Use this dialog for specifying a sale:



- ✔ On the left side is a list of products available to be ordered. Click one of them, and specify its quantity. It appears in the list on the right side, and the total amount owing is immediately recalculated. Note that you can click to show only in-stock products, or enter part of the product's SKU or name to show products with that SKU or name. You can also click to sort the products by SKU, name or price.
- ✔ If you are allowed to adjust pricing, then you can double click a product that is part of the order and change its unit price.
- ✔ If an item should be discounted, choose it in the right hand list of ordered items, then choose the applicable discount from the Discount drop-down menu.
- ✔ If a surcharge should be added to the order, choose it from the Surcharge drop-down menu.
- ✔ Choose an appropriate delivery method from the Delivery drop-down menu.
- ✔ If there is an adjustment to the order, enter a few words to describe it or choose a standard adjustment from the drop-down menu. Then indicate the amount of the adjustment.
- ✔ If the contact is making a DONATION at the same time as placing the order, you can enter the DONATION amount into the Donation field. The new DONATION record gets linked to the SALE, and entered automatically. If you want suggestions for donation amounts, click the Suggest button to get this dialog:



- ✔ Click the radio button corresponding to the amount the CONTACT is donating, then click OK; the DONATION amount is filled into the SALE, and totals adjusted appropriately. Note that the proposed amounts include some round numbers and also include numbers that make the total a round number.
- ✔ If the CONTACT placing the order is willing to make a DONATION in conjunction with this SALE, enter the amount of the DONATION. When you click OK to save the SALE, you are prompted to fill in the details of a partially completed DONATION record.
- ✔ Shipping: If the order is to be shipped to a different address from the buyer's address, click Shipping Address and enter the shipping address. Note that there are also fields for entering a shipper's reference number (e.g. a waybill number), and also for a note to the shipper (like "Leave on the front porch", or "no signature required").
- ✔ If the order is being placed by a CONTACT who is already in your database, click the icon to choose the CONTACT. Alternatively, click Create Contact to create a new CONTACT record.
- ✔ Use the Source drop-down menu to record, for marketing purposes, the source of this SALE.
- ✔ Click New to specify payment information for the SALE.
- ✔ Click Notes to add supplementary notes about the SALE.
- ✔ Finally, click OK to save the SALE into the database.

Merchandise Returns

If a sale took place, then merchandise is returned, you can enter a sale as you usually would, but specify a negative quantity for the items being returned. Then Sumac calculates the appropriate tax and surcharge refunds. You can then process a payment (for a negative amount) indicating a return.

Submissions

Introduction

SUBMISSIONS are proposals received from other parties. They may be unsolicited, e.g. a theatre company receives an unsolicited manuscript for a play, a gallery receives a portfolio of art to exhibit. They may be solicited, e.g. the same theatre company decides to put on a festival next year, and asks artists to send proposed events to be part of the festival.

SUBMISSIONS can be made for the purpose of entering a contest (e.g. the best new artist of 2007), or obtaining entry into the organization (e.g. an audition).

SUBMISSIONS typically go through an evaluation process, where they are assessed for quality and appropriateness. Then they are accepted or rejected (winners, losers).

The SUBMISSIONS feature of Sumac is used to keep track of these proposals and assist in the evaluation process.

Notes for the Sumac Administrator

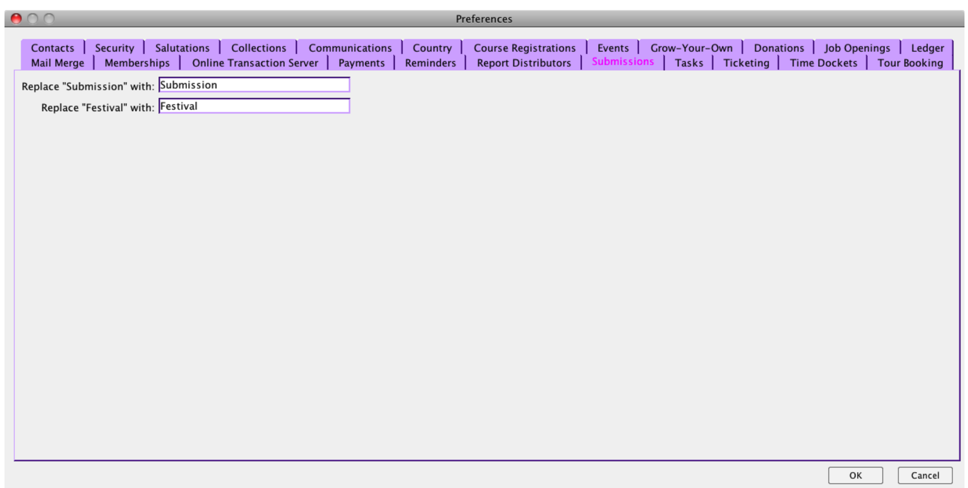
Field Preferences

Use the Utilities/Customize Database/Field Preferences command in the Sumac console to:

- re-label fields
- completely remove fields from the user interface
- make fields mandatory, or
- determine which fields should appear on a website.

in Submission records.

Preferences

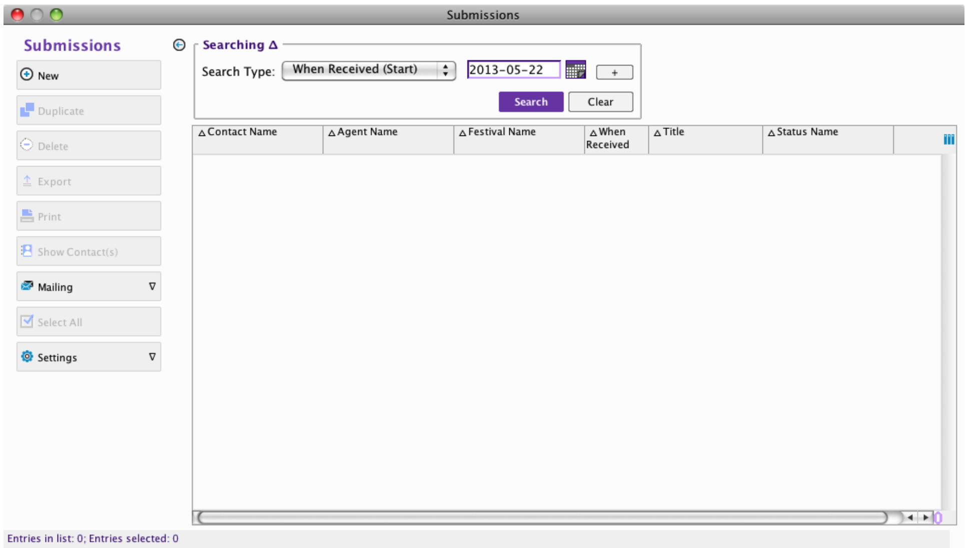


The SUBMISSIONS feature can be customized using some preferences.

- You may change the entire SUBMISSIONS feature to have another name. For example, if you use Sumac's SUBMISSIONS feature to handle information about auditions, you can tell Sumac that it should always refer to SUBMISSIONS as Auditions.
- Each SUBMISSION can be associated with a festival. Perhaps you do not want to keep track of festivals but want to use the festival lookup list to specify information about another characteristic of each SUBMISSION. If your organization does not have festivals, this festival attribute can be renamed and

used for any purpose – perhaps artistic status, financial status, or any other categorization.

The Submissions List



Searching

Search Criteria	*What Is Found*
Start date	Find submissions that occurred on or after this date.
End date	Find submissions that occurred on or before this date.
Contact Last/Company Name	Find submissions to contacts whose last name starts with the entered text.
Status	Choose a submission status entry to limit the search to only those submissions that have the chosen status.
Festival	Find submissions for the specified festival.

If you specify more than one search criterion, then all criteria are used. For example, you can find submissions after one date and before another date.

Buttons

Show Contact(s) Button

Click to select a submission. Then click this button to see the details about the contact for the selected submission. If more than one contact is identified by the selected records, then this button brings the contacts list to the front and shows the selected contacts.

Mail Merge Button

For further information, see *Mail Merge* on page 479.

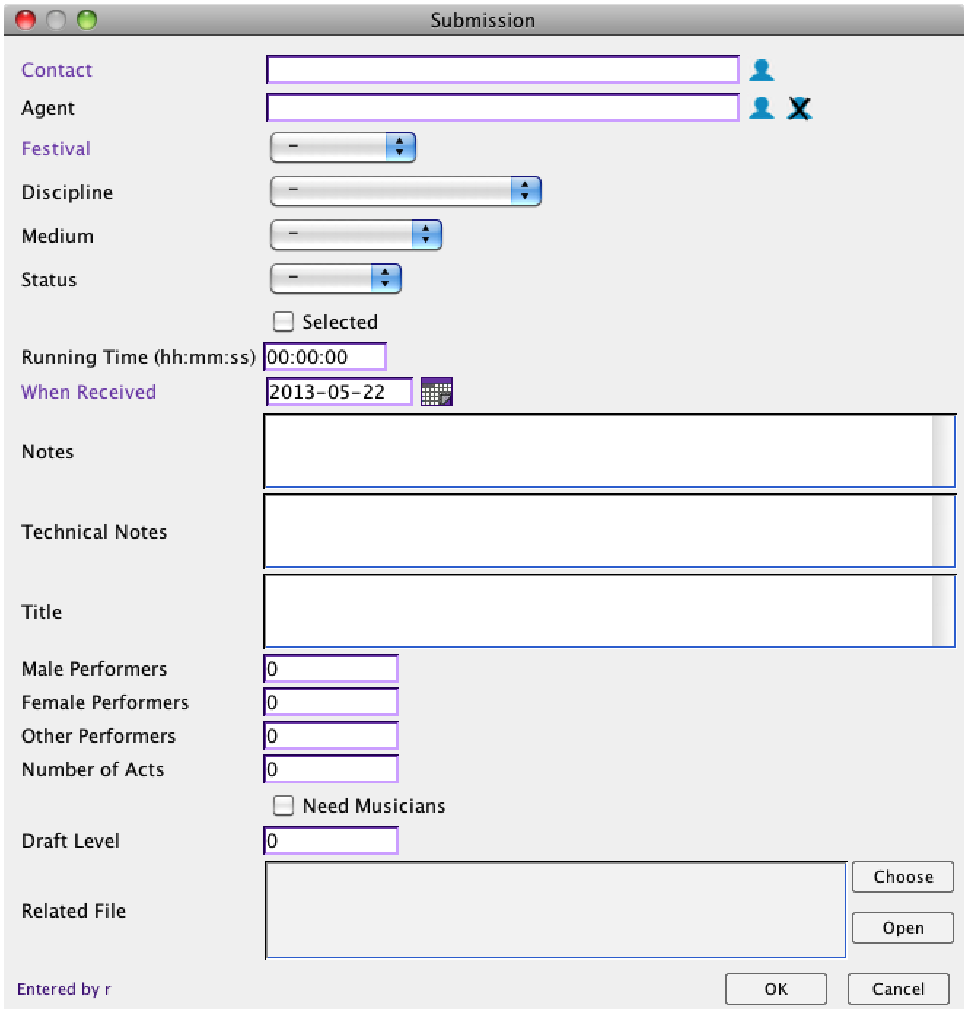
Labels/Envelopes Button

For further information, see *Labels, Envelopes, and Name Tags* on page 469.

Enter Submissions

Here are the steps to follow to enter a submission into Sumac:

- ✔ Show the submissions list and click the New button. Alternatively, show the contacts list, click to a select the contact making the submission, then choose Submission from the New drop-down menu. This dialog appears:



- ✔ Fill in the data fields that you know. The notes field is probably important to describe the work or proposal that was submitted. Most submissions have a title, though it may be a working title; it is useful to record the title for future reference.
- ✔ The Selected check box is used to indicate that the submission was chosen for inclusion in the festival. Usually, when you are first entering a new submission, you do not know if it is going to be included or not, so leave the Selected check box unchecked. You may, however, choose a status to indicate how far along you are in the process of considering the submission.
- ✔ Not all fields apply to all types of submissions. If the nature of the submission is that it takes time (e.g. a play or an audio recording), then indicate its running time. If it is a performance, then the numbers of performers should be indicated. If the submission is a manuscript, then indicate its draft level.
- ✔ Related File can be used to create a link to a manuscript or other document that is stored on a server. Click Choose File to identify the document.

Click Open to cause Sumac to open the document using the default program configured on your computer to open that type of document.

✔ Click OK to cause the SUBMISSION information to be saved.

Subsidiaries

Introduction

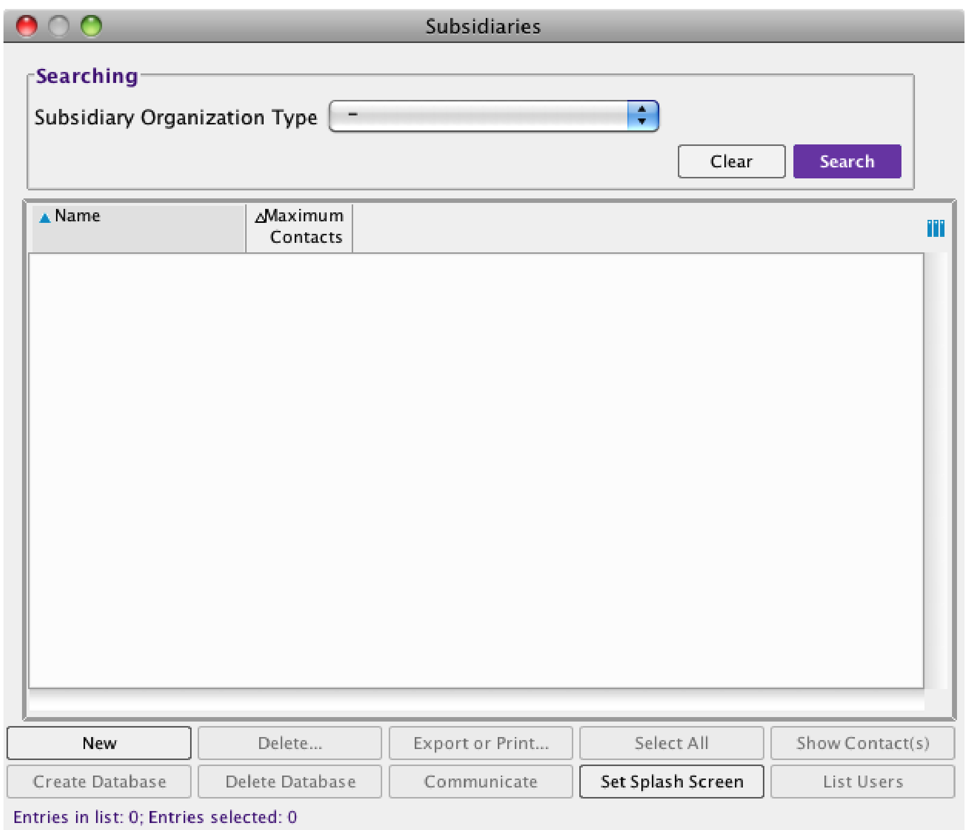
Sumac Multiple Databases module enables you to manage several completely separate Sumac databases (subsidiary databases), each for a separate organization. It allows you to search and communicate with contacts in all the databases, treating them as if they are one large database. This functionality is designed to support situations like these:

- An arts service organization manages several Sumac databases, one for each of its clients.
- A national umbrella organization centralizes the management of data in Sumac databases, but provides all the functionality of Sumac to each regional office.
- A computer network service provider makes Sumac available using a SaaS (Software as a Service) business model. This entails providing Sumac to any organization that wants it, usually charging a monthly fee.

Notes for the Sumac Administrator

When a user creates a new subsidiary database, the new database is given a list of communication and contact types as specified by the Subsidiary Communication Types and Subsidiary Contact Types lookup lists. Be sure to put entries into these lists so that subsidiary databases will be configured correctly.

The Subsidiaries List



Buttons

The Mail Merge, Labels/Envelopes, and Send Bulk Email Buttons work the same as on a single database, except that they operate across all contacts in the chosen databases. For further information, see *Mail Merge* on page 479, Labels Envelopes and Name Tags on page 469, and Email on page 400.

Create Database

After you have created a subsidiary record, you can click to select it, then choose the Create Database command to actually create the database, making it ready to use.

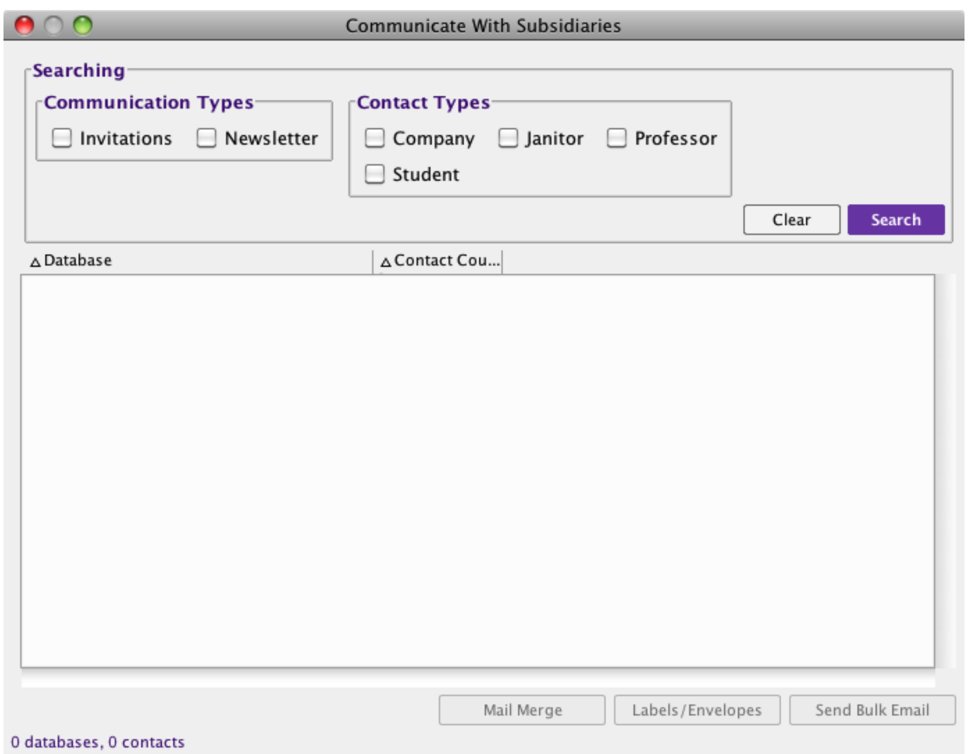
If you have set a splash screen image (see *Set Splash Screen* button below), then the image will be put into the new subsidiary database. Sumac also copies many of the preferences, set by the Utilities/Customize Database/Preferences command in the Sumac console, from your master database to the new subsidiary database

Delete Database

If you click a subsidiary record, this button enables you to delete its database.

Communicate

This button enables you to communicate to selected contacts from selected subsidiary databases. Choose subsidiaries from the subsidiaries list window, then click the Communicate button to get this dialog:



The searching area at the top of the window allows you to specify the types of contacts to be found, and the types of communications they want to receive.

When you click Search, Sumac finds contacts that match the search criteria in each database. Here are some notes about how the searching is done:

- If no search criteria are specified, then all contacts in the database are found.
- If contact types are chosen, then Sumac finds contacts that have any of the chosen contact types.
- If communication types are chosen, then Sumac finds contacts that have any of the chosen communication types.
- If communication *and* communication types are chosen, then Sumac finds contacts that have any of the chosen contact types *and* have any of the chosen communication types.

Set Splash Screen

Click this button to set an image that replaces the standard Sumac logo in the Sumac Console window. This image may be a jpg or gif file up to 80K in size.

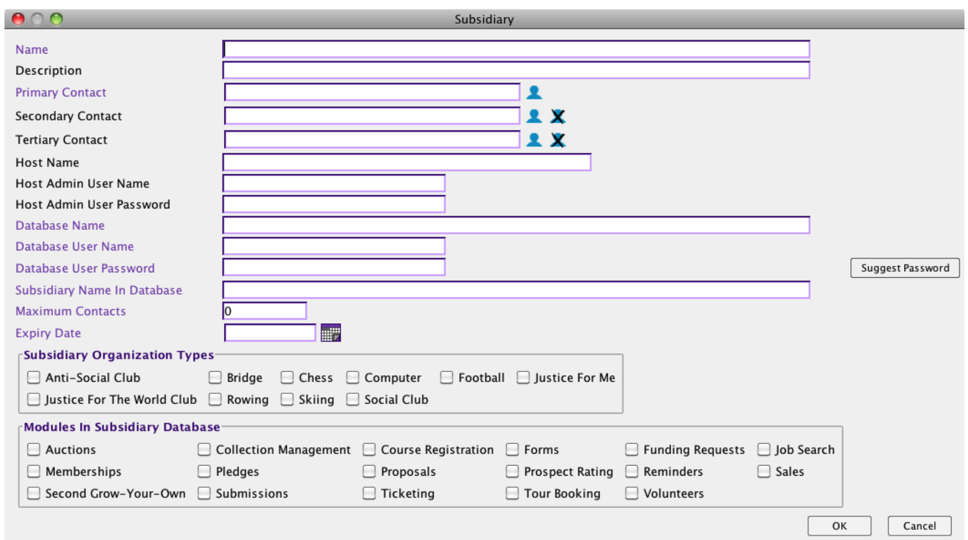
After setting this image, each time a new subsidiary database is created, the image is put into the subsidiary database.

List Users

Click to select a subsidiary, then click this button. Sumac displays a list of all the user IDs and passwords in the selected subsidiary database. This enables you to assist subsidiaries if they have lost their passwords.

Enter Subsidiaries

When you click to create a new subsidiary, this window appears:



Here is the meaning of the various fields:

Field Name	*Contents*
Name	The name of the subsidiary, for internal use.
Description	A further description of the subsidiary, for internal use.
Organization	The contact record for the organization for which this subsidiary is being created.

Field Name	*Contents*
Individual 1 and 2	Up to two individuals to contact about this subsidiary database.
Host Name	The name of the computer that is hosting the subsidiary database.
Host Admin User Name and Password	The user ID and password for logging on to the host database manager.
Database Name	The name of the subsidiary database. It is best to just use alphanumeric characters for database names. No spaces or punctuation.
Database User Name and Password	The Sumac user ID and password to be used when Sumac is used to log on to this subsidiary database.
Subsidiary Name in Database	The name of the organization for which this subsidiary database is being created.
Maximum Contacts	What is the maximum number of contacts allowed in the Sumac database?
Expiry Date	When should this Sumac database expire?
Subsidiary Organization Types	Click to indicate what type of organization the subsidiary is. These are useful for finding similar databases, perhaps so you can send to their contacts.
Modules in Subsidiary Database	There is a check box for each Sumac specialized module that is licensed for use in the master database. Clicking one of these check boxes gives the subsidiary database access to the chosen specialized module.

Tasks and Volunteers

Introduction

Terminology Note

Any CONTACT can be classed as a worker or volunteer. Although referred to as volunteers, these CONTACTS may be staff within your organization. Once someone has been defined as a particular type of volunteer, he or she appears in the task assignment list. In effect, the term "volunteer" in Sumac really means "someone to whom tasks can be assigned."

Notes for the Sumac Administrator

Field Preferences

Task records can contain a large number of fields of information. Very few organizations actually need all of them. You should use field preferences to refine your task records to show just what you need. Use the Utilities/Customize Database/Field Preferences/Tasks command in the Sumac console to:

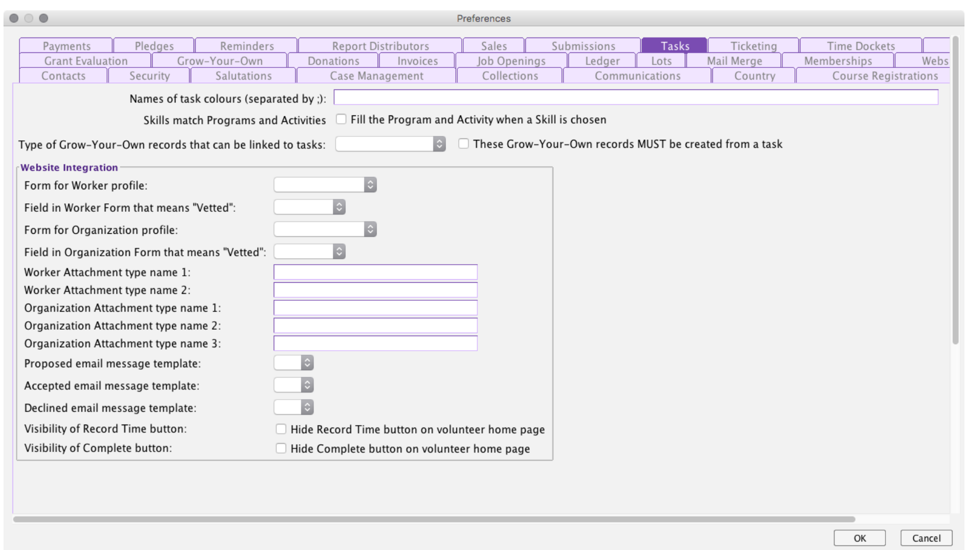
- re-label fields
- completely remove fields from the user interface
- make fields mandatory, or
- determine which fields should appear on a website.

in Task records.

Preferences

Logging

Use the Utilities/Customize Database/Preferences command in the Sumac console to get the Preferences dialog. A preference in the Security tab lets you tell Sumac to automatically log whenever a task is viewed or edited.



Task Colour

Enter standard *names* to be used for the colours of tasks. Note that the actual colours are built in to Sumac – you cannot change them.

Skills

If the structure of your Skill Types/Skills is similar to the structure of your Programs/Activity Types, there is a preference to tell Sumac that when Skill Types/ Skills are chosen, the Programs/Activity Types should be filled in automatically.

Tasks and Grow-Your-Own (GYO)

A task may be related to a GYO record, indicating something that needs to be done for the GYO record. For example, if the GYO record is a case record for a client, tasks may indicate work required to deliver services to the client.

Use the drop-down menu to choose the type of GYO record to be connected to tasks.

If *all* tasks must be connected to a GYO record, then you may want to specify that the tasks can only be created from within the GYO records. Click the checkbox to enforce this restriction.

If tasks are related to Grow-Your-Own (GYO) records, the Utilities/Customize Database/Preferences command lets you restrict the creation of the GYO records so that they can only be created from a task.

Volunteer Management on Your Website

If you are licensed for the Sumac Web Integration package, and the Volunteers module, you can allow volunteers to sign up on your web site. The volunteer sign up page accepts the volunteer's personal information such as address and communication preferences as well as preferences for tasks they may be interested in. To control which preference options appear on your web page, set the *show on web* check boxes in the communication preference and skill lookup lists (see page 592).

Overview

Sumac Volunteers enables you to keep track of:

- volunteers: CONTACTS who perform TASKS for your organization
- the qualifications, availability, and TASK preferences of the volunteers
- recognition that volunteers have received for their work
- TASKS that need to be performed by volunteers
- time spent by volunteers working on assigned tasks.

Sumac can match volunteers' preferences, availability, and qualifications with the requirements of TASKS to be performed. It then enables you to assign TASKS to specific volunteers.

When TASKS are performed, you can record time dockets, and report on the time spent on particular programs. See *Time Dockets* on page 371.

Introducing A New Volunteer to Your Organization

Introduction of a new volunteer to your organization's roster usually entails several steps, perhaps:

- interview
- check identity (perhaps drivers license)
- check references
- check police records
- check specialized skills
- provide training

If you use Sumac Reminders, you can track these steps with Sumac.

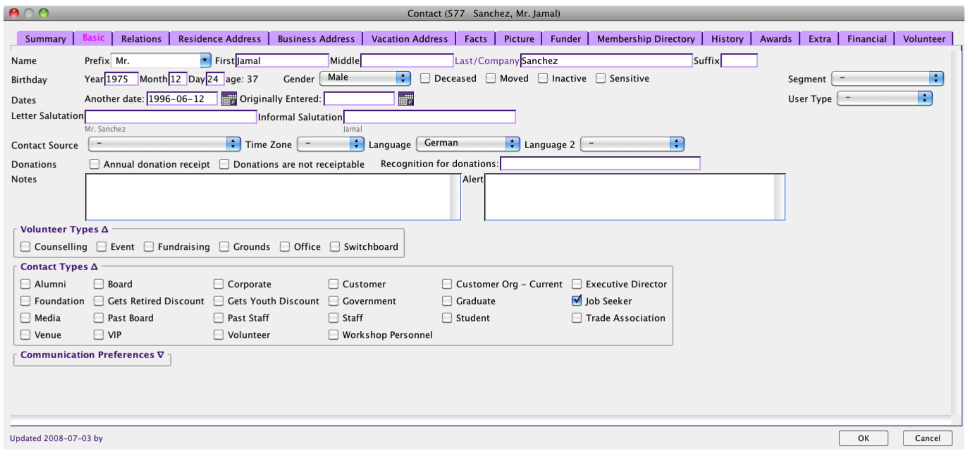
Once these steps are completed, the very last step, which causes Sumac to treat the CONTACT as a volunteer and makes him or her appear in the TASKS list, is to set the applicable volunteer types in the volunteer's CONTACT record.

Describing Volunteers in Contact Records

Sumac Volunteers adds two types of information to CONTACT records: volunteer types, and additional types of facts. These are each described in a following section.

Volunteer Types

Volunteer types show up as a set of check boxes just above CONTACT types in the Basic tab of each CONTACT record:



Each CONTACT may be of one or more volunteer types. Click the check boxes that apply.

Sumac does not act differently based on CONTACTS' volunteer types. These are for your convenience in sorting, searching, and reporting.

Facts For Volunteers

Several different types of facts can be used to create a profile of each volunteer. Often the process of introducing a new volunteer into your organization entails entering facts that record information about the types of TASKS that the volunteer might do.

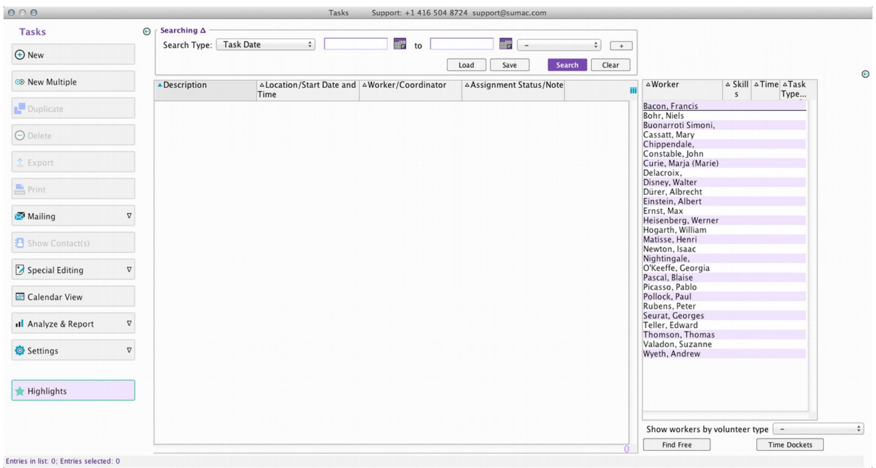
These additional types of facts can be used to specify the types of TASKS that a CONTACT is willing to do (preferred TASKS), able to do (qualifications), and ready to do (available and unavailable time). They also allow you to specify the nature of the recognition that you have given a volunteer for his or her work.

Preferred Task	Choose a task type that the CONTACT wants to perform. Note that you can have several Preferred Task facts to indicate that the CONTACT is willing to do several different types of TASKS.
Qualification	This type of fact is used to specify a skill or qualification held by the CONTACT. You choose the skill from a drop-down menu of skills. You can also specify who checked (confirmed) the skill and when. Also, you can specify the future date when the skill should be validated again. If you use Sumac Reminders, then when you save a qualification fact, Sumac asks if you want to set a REMINDER to re-validate the qualification.

Available	Specify when the CONTACT is available to do TASKS. Specify a day of the week, start and end times within those days, or both.
Unavailable Time	This type of fact enables you to record when the CONTACT is unavailable. You can specify a date range, a day of the week, or both.
Recognition	This fact can record the type of recognition that has been given to the CONTACT. If the recognition is a gift, this type of fact can help prevent giving the same gift to a CONTACT several times.

The Tasks List

Click the Tasks button in the Sumac Console to get this TASKS list dialog:



The left side of the above dialog shows a list that is similar to most other lists: searching criteria at the top, a list of TASKS to be performed, and buttons on the left for doing things to TASKS.

The far right side of the TASKS list contains a list of CONTACTS. This list shows all the CONTACTS who have one or more volunteer types selected in their CONTACT record. You can double click to see the detailed record for each CONTACT. Note that you can use a drop-down menu to limit the list to showing only CONTACTS with a particular volunteer type. The small button above and to the right of the list of contacts hides and shows the list of contacts, making more room for the list of tasks.

Calendar View

The Calendar View of tasks shows the tasks by date, one day, week or month at a time. The view can be filtered to show tasks from a specific department and only those tasks for specific programs.

Searching

You can find TASKS by specifying various search criteria (described in the following table) and clicking the Search button.

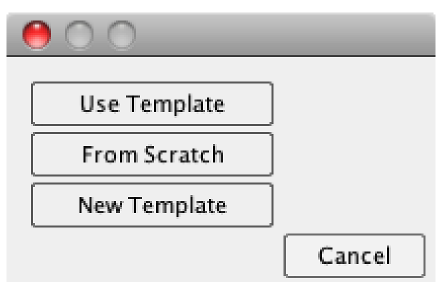
Search Criteria	*What Is Found*
Start date	Find TASKS that occur on or after this date.

Search Criteria	*What Is Found*
End date	Find TASKS that occur on or before this date.
Coordinator	Each TASK may have a coordinator – usually a staff person responsible for the TASK. If you want to find all the TASKS for a particular coordinator, enter the first few letters of the coordinator's last name.
Worker	You can find all the TASKS assigned to a particular worker by entering the first few letters of the worker's last name in this field.
Client	Some organizations, e.g. social services, perform TASKS for certain CONTACTS who are clients of the organization. If you want to find TASKS for a particular client CONTACT, enter the first few letters of the client's last name in this field.
Task Template	Click this check box to restrict the search to find only task templates.
Department	Choose a department, and click Search to find TASKS associated with this part of your organization.
Program	To find the TASKS associated with a particular program, choose it from this drop-down menu, then do the search.
Assignment Status	TASKS move from one status to another over time. If you want to find all TASKS with a particular status (e.g. *completed*), choose the status from this drop-down menu.
Task Type	Choose the types of tasks that you want to find.
Event	Perhaps you are using Sumac to coordinate all the volunteers working at a particular event. Choose the event from this drop-down menu, then click Search to find the TASKS associated with the event.

Buttons

New Button

When you click the New button, this dialog appears:



You have these three options for creating a new TASK:

- *From a template.* This option presents you with a dialog showing all the existing TASK templates, organized by department and program. You click to choose one. Then a TASK window is presented, with fields from the template already filled in.
- *From scratch.* This presents you with the window for editing a single TASK.

- *Create a new template.* This presents you with the window for editing a single TASK. Its template check box is set. When templates are showing in the TASKS list, they are drawn in a different colour so you can distinguish them from regular TASKS.

Show Contacts Button

Show all the CONTACTS identified by the selected TASKS. If only one CONTACT is identified, then that CONTACT's details are displayed. If multiple CONTACTS are identified, then the CONTACTS list is displayed with those contacts listed.

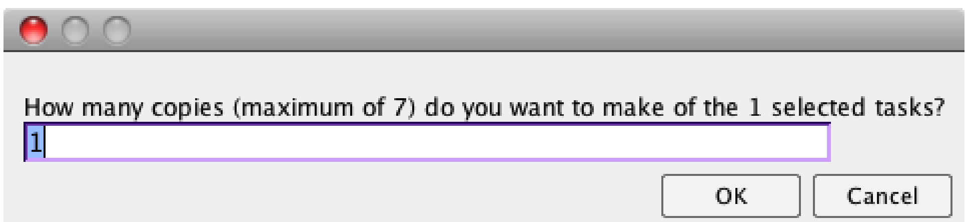
Bulk Edit Button

This button lets you edit many records at once. Click to choose the task records of interest, then click the button to set particular values into their fields.

Duplicate Button

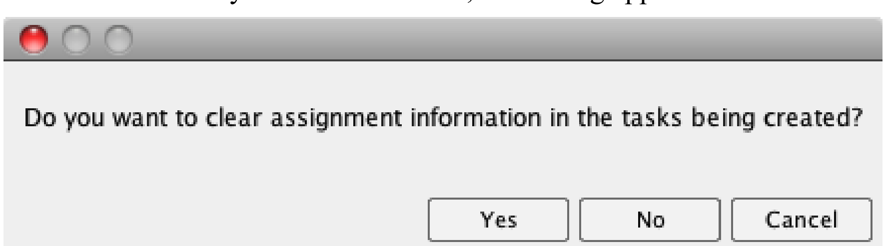
The Duplicate button allows you to make copies of recurring TASKS. For example, if you are presenting a performance for three nights, you may be assigning volunteers to the information desk and to the coat check. You could create TASKS that define these two jobs for the first performance, then select them, and click Duplicate to create copies of these TASKS for the other two nights.

When you click Duplicate, this dialog appears:



Specify how many copies you want, then click OK. Then this dialog appears, asking if you want any assignment information in the TASKS being copied to be removed from the new copies being created (without affecting the originals):

Usually you click Yes, to clear the assignment information, unless the same volunteer who is going to be performing the original TASKS is also performing the duplicate tasks. When you click Yes or No, this dialog appears:



Sumac is informing you that the next windows you see will contain the TASKS that are about to be duplicated, and that you have a chance to change them, if necessary, before the duplicates are saved.

When you click OK, you are presented with a TASK into which you can enter values to override those in the TASKS being copied.

Mail Merge Button

You can produce one or more new documents – e.g. a personalized letter, invitation, renewal notice, or receipt – by merging task data from the database, with a document template file that you have previously created. For details on how to create document templates, see the *Create Document Templates* on page 499. For details on how to do merge operations, see *Mail Merge* on page 479.

Calendar View Button

Click this button to view the tasks as a calendar. You can switch the calendar between day, week, and month views. Click a task in the calendar to view or edit it.

Assign Button

If you click to select a TASK which has no assigned volunteer, and click to select a volunteer, you can then click the Assign button. This changes the TASK to indicate that it is assigned to the selected volunteer. The TASK status is also updated to *assignment proposed*, to indicate that the TASK has been tentatively assigned to the indicated volunteer CONTACT.

Send Bulk Email Button

If you want to send a bulk email to people associated with tasks, click this button. You are asked to choose whether you want to send to the task coordinators, the workers, or the clients. Then you proceed to do the standard steps for sending bulk email (see *Email* on page 400).

It is also possible to use this button to send email directly to contacts in the job seekers list instead of contacts associated with selected tasks. To do this, click to select people in the job seeker list, then click Send Bulk Email.

Set Assignment Status Drop-Down Menu

You can select one or more TASKS, then set their assignment status by choosing the appropriate new status from this drop-down menu.

Find Free Button

Some TASK assignments can go on for a long time. For example, a TASK that entails counseling a client may go on for many months until the counseling is complete. When such a TASK is entered, it is often given a Start Date, but no End Date.

The Find Free button finds volunteer CONTACTS who are *not* currently assigned to an incomplete TASK. A TASK is considered to be incomplete if its assignment status is unspecified or is *unassigned*, *assignment proposed*, *contact notified*, or *contact accepted*. If a TASK has a status of *completed*, *contact debriefed*, or *contact thanked*, then it is considered to be complete.

> Hint: Note that a CONTACT may have an incomplete assigned TASK but still be willing to take on other tasks.

After you click the Find Free button, volunteer CONTACTS in the TASKS list window who are assigned to an incomplete TASK are dimmed (shown in grey) and volunteer CONTACTS who are free continue to be displayed in black.

After you click the Find Free button, it gets renamed to Update Free. Over time, as you or other people assign TASKS to volunteers, volunteer CONTACT's free status may change, so you can click this button again to update the list, showing a different set of dimmed and regular CONTACTS.

Tasks To Time Button

Click this button to create time dockets for the worker(s) who performed the selected Tasks. For more information, see *Time Dockets* on page 371.

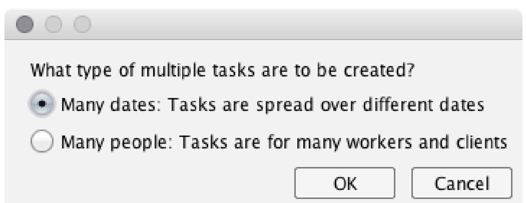
Time Dockets Button

When you click the Tasks To Time Dockets button, you are presented with a list for viewing and recording time spent on particular programs and for particular clients. For more information, see *Time Dockets* on page 371.

Enter Tasks

One or Several

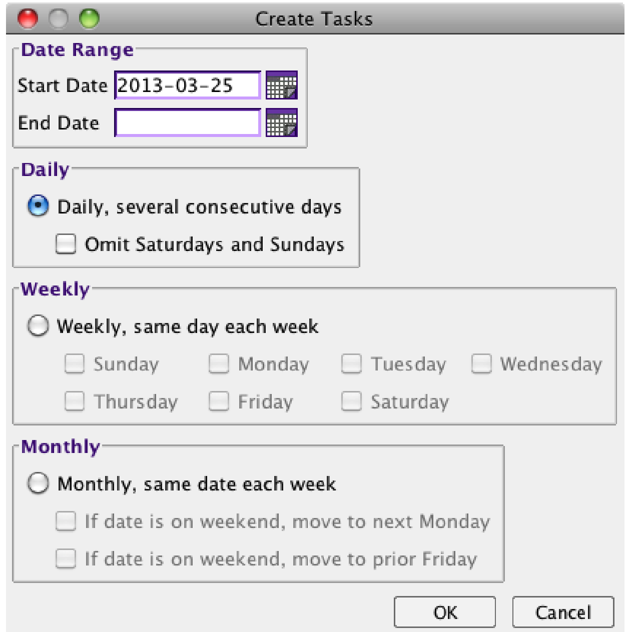
To create a single task, click the New button. To create several similar tasks, click New Multiple. The New Multiple button presents this window:



Click one of the radio buttons, then click OK to create multiple tasks. The next two sections describe the different radio butons.

Many Dates

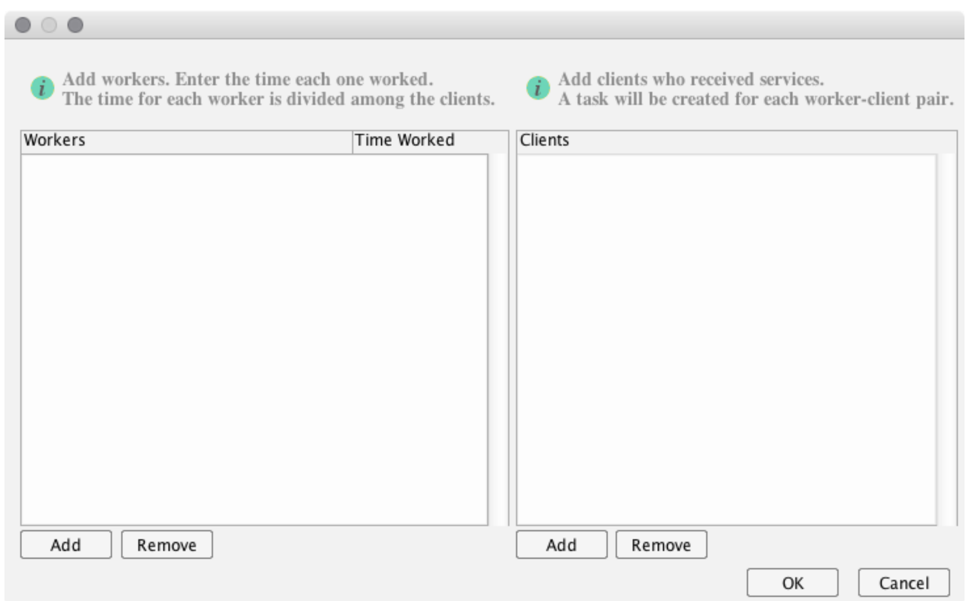
This option lets you specify a range of dates when the tasks are to be performed.



Specify information about the recurring task: the date range in which they should be created, and whether the task repeats daily, weekly, or monthly. Click OK, and you are presented with the window for defining a single task (see below) which you should fill in. Note that you will not be able to specify the start date of the task, since this will be computed and filled in automatically by Sumac for each of the multiple tasks it creates.

Many People

If you want to specify many tasks, usually after they have taken place, to record one or more workers providing services to one or more clients, use this option. It presents the following window:



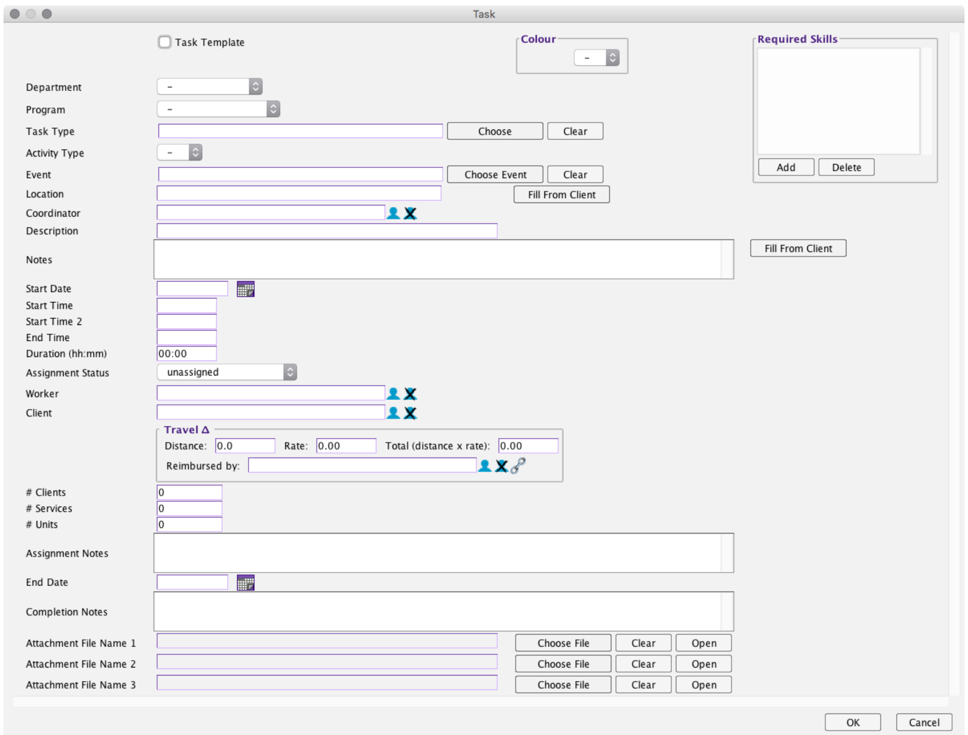
Add workers on the left side, clients on the right. You should also add the time spent by each worker.

When you click OK, Sumac lets you specify a task, then creates copies of that task, one for each pair of workers and clients. So if you specify 2 workers and 4 clients, there will be 8 tasks.

The time specified for each worker is spread equally among the tasks. So if a worker worked for 60 minutes for four clients, the task records will show 15 minutes for each client.

Single Task Window

When you click New or Duplicate, or double click an existing task, this dialog for entering and editing a task appears:



Here are explanations of the fields:

Field	*Description*
Task Template	This checkbox indicates whether the task you are editing is a template or not. Click it to change a task to a template or vice versa.
Required Skills – Add, Delete	If special skills are required to perform a task, then click the Add button to add them to the list of Required Skills. If you add one by mistake, you can click to select it, then click the Delete button to remove it from the list of requirements.
Task Type	Some volunteer contacts prefer to do tasks of a certain type. You can record their preferences in the Facts tab in their contact record. Then, if you specify the type of a task, Sumac can highlight for you which volunteer contacts want or do not want to perform the task. See *Matching Tasks to Volunteer Contacts* on page 351.

Field	*Description*
Colour	You can specify a colour for a task. This colour is used to display the task in the Calendar View of the tasks.
Department	Organizing TASKS by department is convenient for future searching. Choose, from the drop-down menu, the department that this TASK is associated with.
Program	Your organization may run different programs offering a variety of services to various types of clients. If you want to keep track of TASKS performed for each program, then be sure to use this drop-down menu to specify the program for each TASK.
Activity Type	You can indicate the type of activity. This field is moved into the activity field in TIME DOCKETS if you create TIME DOCKETS from the TASKS.
Event	If this TASK relates to a particular event (e.g. a theatrical performance, or a fundraising event), then choose that event from the drop-down menu. Later, you can find all the TASKS associated with that event.
Location	Specify the location where the TASK is to occur. If the location is in a client's contact record, and you have specified the client, click the Fill From Client button and Sumac puts the client's residence address into the Location field.
Coordinator	If a staff person is coordinating this TASK with the volunteer, and perhaps with a client, then click to specify the coordinator for the TASK.
Description	Describe the TASK to be performed.
Notes	If there are extra notes about the TASK, enter them here. Specify the location where the TASK is to occur. If you record relevant notes in a client's contact record, you can click *Fill From Client* to have the contact notes put into this task.
Start Date	Enter the date on which this TASK is to be performed. If the TASK spans many days, enter the first date.
Start Time, Start Time 2, End Time	If this TASK has specific times, then enter them here. Some tasks have multiple start times: for instance a pre-task assembly time followed by the actual start time of the task.
Duration	If you enter both Start Time and the End Time, then Sumac automatically fills in the Duration. But you can also manually enter a Duration without specifying the exact times. This lets you handle situations where a TASK is expected to take a known amount of time (e.g. stuffing 100 envelopes takes 90 minutes) but it does not need to be done at a particular time of day.

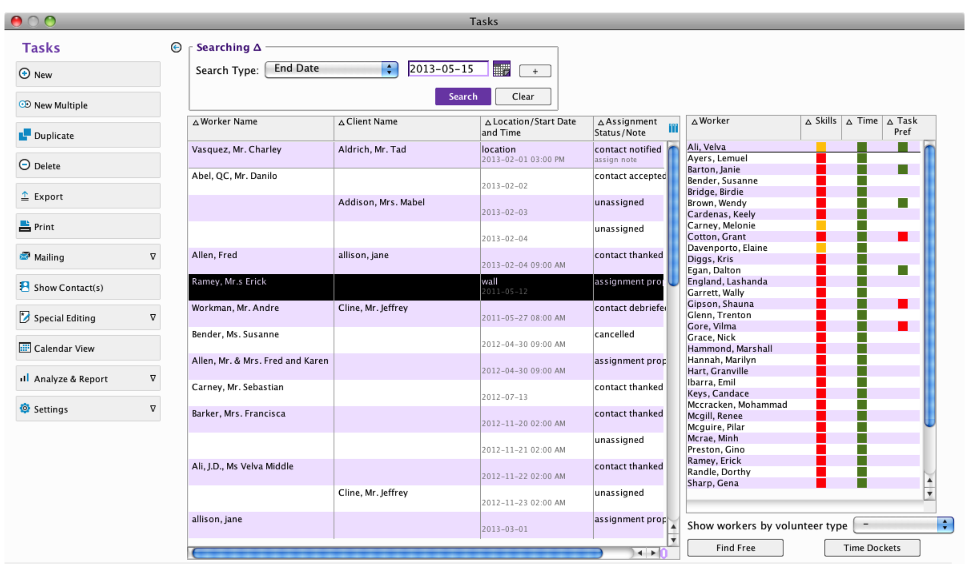
Field	*Description*
Assignment Status	Assignment Status indicates how the TASK is progressing with respect to being performed by a volunteer. Here are the assignment statuses available: ◆ *unassigned*: new TASK, not assigned to a volunteer ◆ *assignment proposed*: the volunteer is suggested as one who could do this TASK ◆ *volunteer notified*: the volunteer has been told about the proposed TASK assignment ◆ *volunteer accepted*: the volunteer has agreed to do the TASK ◆ *completed*: the volunteer completed the TASK ◆ *volunteer debriefed*: the volunteer has been debriefed after performing the TASK ◆ *volunteer thanked*: we have thanked the volunteer for performing the TASK You can specify any assignment status for any TASK. Sumac sets the status of a new TASK to *unassigned*. When you use the Assign button to indicate that a particular volunteer is assigned to a particular TASK, Sumac sets the status of the TASK to *assignment proposed*.
Worker	Click to indicate the worker CONTACT assigned to this TASK.
Client	Click to choose the client CONTACT for whom this TASK is being performed.
[Case]	This allows you to link a task to a particular type of Grow-Your-Own (GYO) record. In the picture, the GYO records are named *Case*. Click buttons to create a New GYO record, Choose an existing on to connect to this task, Clear the link (without affecting the GYO record itself), and to Show the linked GYO record.
Travel	If the task entails travel and it may be reimbursed, this area lets you specify the travel distance, reimbursement rate, and the reimbursing contact.
Assignment Notes	If there are special notes regarding the assignment, enter them here.
End Date	If the TASK completes on a certain date, enter that date here. If the TASK is open-ended, then leave this field empty.
Completion Notes	When the TASK is completed, you may want to record notes about how it was done.

Matching Tasks to Worker (Volunteer) Contacts

The TASKS list provides you with assistance in matching tasks to volunteer CONTACTS who can perform the TASKS. When you click a TASK on the left side, Sumac shows, in the list of volunteers on the right side, which volunteers are appropriate to do the task. Sumac shows this by means of colours for three aspects of performing the task:

	Skills (Able) *Is the Contact qualified for the Task*?	*Time (Ready)* *Is the Contact available when the task needs to be performed?*	*Task Pref (Willing)* *Does the Contact want to do this type of task?*
Green	The CONTACT has *all* the necessary qualifications, and they have been verified recently.	The CONTACT is available at the time of the selected TASK.	The CONTACT has specified task preferences which include the type of TASK that is selected.
Orange	The CONTACT has *some* of the qualifications needed to perform this TASK. Alternatively, the CONTACT has *all* the qualifications needed to perform this TASK, but some of them have a to-be-checked date that is in the past	The CONTACT has indicated that she is not available at the time that the selected TASK needs to be performed.	The CONTACT has specified task preferences but the TASK does not indicate what type of TASK it is.
Red	The CONTACT does not have any of the qualifications needed to perform this TASK.	The CONTACT is assigned to one of the TASKS showing in the list, and it conflicts with the time of the selected TASK.	The CONTACT has specified task preferences which do not include the type of TASK that is selected.
Empty	The TASK does not specify any required skills.	The TASK does not indicate when it needs to be performed.	The CONTACT has not specified preferences for certain types of TASKS.

Consider this picture:



A TASK is selected, and Sumac is indicating which volunteers can do the TASK:

- The selected TASK specifies certain skill requirements. Most CONTACTS do not have them (), but some do () and others might ().
- Most volunteers are available at the time required for this TASK, but some are not.
- Most volunteers have not specified task type preferences, but two have. The TASK indicates what type of TASK it is, so Sumac can show that the volunteer wants to () or does not want to () do the TASK.

Hint: You can click on the Skills, Time, and TASK Pref column titles to sort the list of volunteers by the chosen column.

Task Summary Report

Introduction

The Task list window is able to produce a highly customized report – the Task Summary. This report is usually used to produce a numerical summary of task records to describe and analyze work performed over a period of time.

Define the Report

A Task Summary report can contain one or more tables, each containing rows and columns of information. You must define each table you want: its title, and what goes into each row and each column. You use the Analyze & Report/Task Summary Builder command to define the report you want. See *Defining the Task Summary Report* on page 353 for more information.

Once you have defined the report you want, you save the report description into a file.

Generate the Report

Then choose the Analyze & Report/Task Summary command to create the report. It asks you to specify the range of dates for the task records to be included in the report, and the saved report description. Then it creates the report.

Hint: The report shows only tasks whose contacts are in segments that the user is allowed to see.

Defining the Task Summary Report

Before you can create a Task Summary, you must define the report you want. The report consists of several tables, each containing rows and columns of information. You must define each table, and what goes in it.

To start, click Analyze & Report/Task Summary Builder. The proceed as follows:

File Management: Save and Load Buttons

If you want to alter a previously defined task summary report description, click Load to load the definition file. When you are done creating or editing a report description, click Save to save it into a file.

Tables: Add Table, Delete Table, and Duplicate Table Buttons

The report consists of several tables. The Task Summary Builder shows a list of all the tables in your report

- Click Add Table to define a new one. Give it a name, and it appears in the list of tables. Click checkboxes to indicate if the table should have row totals (an extra column on the right hand side), column totals (an extra row at the bottom of the table), or percentages (additional columns that show percentages instead of totals). The right hand side of the window lets you add rows and columns to the table.
- If you want to remove a table from your report, click to select it, then click the Delete Table button.
- If you want a table that is very similar to one you have already defined, click to select the existing table, then click the Duplicate Table button.

Rows: Add, Delete, Duplicate

In the same way that you manage tables, there are buttons for adding, deleting, and duplicating rows.

Rows let you specify which task records are to be included in the report, based on information about the contacts in the task record.

When you click to add a row, you specify the following information:

- The name of the row, which appears in the left-hand column of the table.
- Task type filters: which types of tasks should be included in the row.
- Contact filters: which contacts should be included in the row. You specify which contact field (worker, coordinator, or client) in the task records is to be examined, which field should be examined in each contact record, and then the values (expressed as a list or a range) for that contact field which cause the task to be included in the report.

Columns: Add, Delete, Duplicate

In the same way that you manage tables and rows, there are buttons for adding, deleting, and duplicating columns. When you click to add a column, you specify the following information:

- A formula to be calculated for the column. This formula can be created using Utilities/Template/Mail Merge Codes, and should use variables that identify fields in task records. The formula can be applied as a Sum (it is added for all task records to get the desired value), or as a Count Unique (unique values of the formula are counted).
- Task Type and Contact filters: These filters work the same as the filters defined for rows. Note that the data elements that appear in each cell of the table are those that match both the row and column filters for that cell.

Ticket Orders

Introduction

Sumac supports ticketing. You can specify ticketed events occurring at specific venues, provide seating plans and detailed pricing, then book tickets and print them.

Notes for the Sumac Administrator

Field Preferences

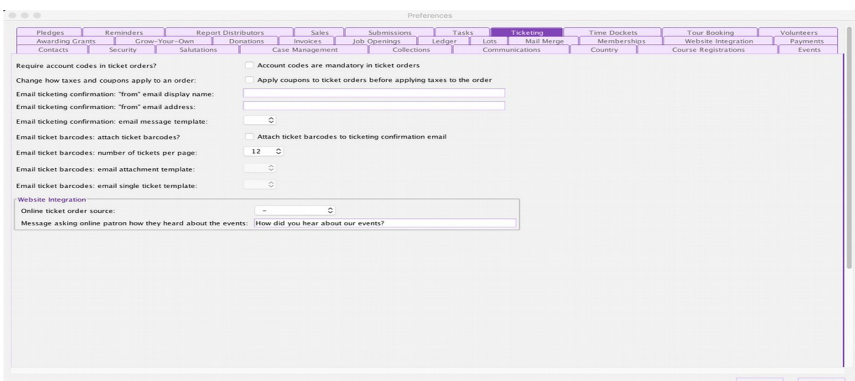
Use the Utilities/Customize Database/Field Preferences/Events command in the Sumac console to:

- re-label fields
- completely remove fields from the user interface
- make fields mandatory

in events fields that relate to ticketing areas.

Preferences

Use the Utilities/Customize Database/Preferences command in the Sumac console to get the Preferences dialog. Click the ticketing tab.



This tab allows you to:

- Check a box to make account codes mandatory in ticket orders
- Check a box to tell Sumac to apply coupons to ticket orders before applying taxes
- Specify a “from” email display name for ticketing email confirmation
- Specify an email for Sumac to send ticketing email confirmations from
- *Email ticketing confirmation: email message template*. This template is used to generate the body of the confirmation email.
- Check a box to attach barcodes to ticketing confirmation emails
- Select the number of barcodes for Sumac to print per page
- Select one or two templates to generate a PDF attachment to the confirmation email. This attachment normally contains ticket details including barcodes.
  - Scenario 1- Select only the first template (*Email ticket barcodes: email attachment template*): Sumac uses the first template and appends additional pages to hold the barcodes. The number of barcodes per page is what you

specify in the drop down menu, but you do not have control of the formatting.

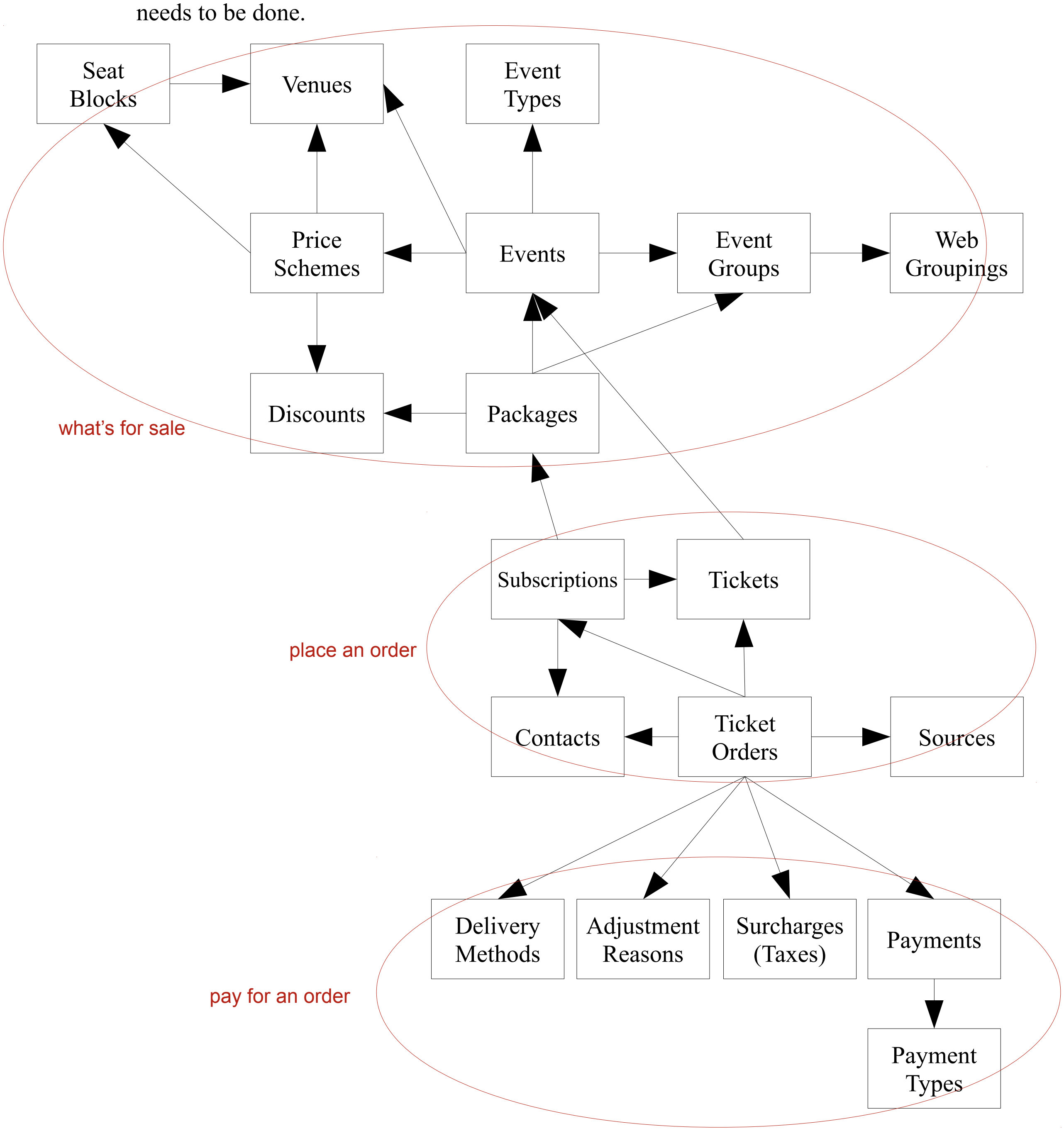
- Scenario 2- Select two templates (*Email ticket barcodes: email single ticket template*): If you select both templates, Sumac still uses the first template and appends barcodes, one per page, using the second template. The PDF template for each ticket (barcode) can contain a variable which will be turned into a barcode: the variable is t_Barcode. When you specify a single ticket template, this also overrides the drop-down menu of number of tickets per page.

◆ Website integration

- Select a source for Sumac to assign to online ticket orders
- Specify the text Sumac displays online when asking patrons how they heard about your event

Processes Involved in Ticketing

Before tickets can be sold, you must tell Sumac what tickets are for sale and how they are priced. This picture and the notes on the following page, explain what needs to be done.



Notes About the Preceding Picture

what's for sale

An *event* occurs at a specific time and date. In the case of a theatre, which may present the same production several times, an even describes a single performance of that production. *Event types* are used to collect events together for convenient searching and sorting: you might have event types like performance, seminar, or fundraiser.

An *event group* is a list of events, gathered together for convenience. For example, all the performances of a single production could be an event group; then you could find who attended any performance of the production by searching for all attendance to any event in the group. An event group may be all the events in a time period: perhaps all fundraising events in 2012, so you could search to find all donations to fundraising events in 2012. Finally, if you want to allow patrons to use your website to buy tickets for an event, then the event must be in an event group, and the event group must be part of a *web grouping*.

Before you can sell tickets to an event, you must create *seat blocks* to specify the seats that are available in a particular *venue*. You must also specify the *price scheme*, which defines the price at each *discount* level for each seat in the seat blocks.

You can sell single *tickets*, which identify a seat in a *seat block* for a particular event at a particular *venue*.

You can also sell *packages*, which provide for any combination of tickets to several events.

place an order

A *ticket order* can order single *tickets* or *subscriptions*. A *subscription* is a specific purchase of a pre-defined *package*, which usually gives a patron access to tickets for several events at discounted prices.

A ticket order connects to a *buyer contact*. In addition, for each *subscription* you can specify *additional contacts* who are coming to the performances along with the buyer. The *source* for a ticket order is helpful to marketing efforts.

pay for an order

Each order may have a *delivery method* (how the tickets are supposed to be delivered to the buyer). There may be *surcharges* applied per order or per ticket. You may have to adjust the price of an order, and can provide an *adjustment reason* indicating why you did this. Finally, there may be one or more *payments* of different *payment types*.

Surcharges and Coupons

You can tell Sumac whether surcharges should be applied before or after coupons are used to reduce the price of tickets being purchased. Use Utilities/Customize Database/Preferences/Ticketing and set the check box accordingly.

Steps To Set Up Ticketing

Before you can start ordering tickets, several lookup lists need to be set up. Since some lookup list entries refer to entries in others, it is easiest to set them up *in the following order*:

These are simple lookup lists – each entry just contains a name for something:

Step 1: Print These Steps

You will probably find it convenient to print from page 355 to page 363 of this manual. You can then use the print-out as a checklist, as you perform each step.

Step 2: Make the rest of the steps more convenient

To make ticket orders work completely, you need to set up about a dozen lookup lists. But after the initial set-up, you will be able to manage ticketed events just using the Events list.

Depending on the venues and pricing you use, you may find, as you are adding new ticketed events, that you often need to use one of these other four lists: Ticket Discounts, Price Schemes, Seat Blocks, and Venues. If so, you should tell Sumac to make these four lists available directly from the Events list. Do this by choosing Utilities/Customize Database/Preferences/Events, and clicking to turn on the checkbox *Let users editing events also edit venues, price schemes, seat blocks, and discounts*.

When you do this, Sumac adds commands to Special Editing in the Event list so you can edit these lookup lists directly from the Events list.

Step 3: Lookup List: Adjustment Reasons

If the value of a TICKET ORDER needs to be adjusted, then an adjustment reason must be specified. The user making the adjustment can manually enter the reason for the adjustment, or alternatively can just choose one from this lookup list.

Adjustment reasons are text descriptions of why a price adjustment was applied to an order. A couple of examples are *media*, *mistake in last order*. These are used internally and never appear on your website.

Step 4: Lookup List: Delivery Methods

Delivery Methods are how the tickets for an order are supposed to be delivered. All delivery methods are available to a Sumac user who is entering an order, but you can prevent a delivery method from appearing on your website.

Possible entries include: *Box Office Pick-up*, *Courier*, and *Post*.

Step 5: Lookup List: Event Types

Event Types are used for internal classification of events. Some events might be seminars, others are performances, and others may be fundraising events.

More details, including some suggested possible values, are at *Event Types* on page 615.

Step 6: Lookup List: Payment Types

Each ticket order can have one or more payments associated with it; each payment must have a payment type, e.g. *MasterCard* or *Cash*. You may have already defined Payment Types, because they are used whenever a payment needs to be made: for example, to make a donation. Only payment types that are credit cards are available to website users buying tickets using your website.

More details, including some suggested possible values, are at *Payment Types* on page 632.

Step 7: Lookup List: Sources

Sources record how a patron found out about you, or what led to the ticket order. When an order is placed using Sumac, you may specify the source. Sources are typically used by marketing people to track what communication channels are generating sales.

More details, including some suggested possible values, are at *Sources* on page 648.

Step 8: Lookup List: Web Grouping

If you are going to allow people to purchase tickets through your website, then you *must* have at least one Web Grouping.

If you have a lot of events, and it may make sense to group them for presentation to people ordering tickets on your website. For example, a possible three-way grouping for a theatre might be *workshops*, *regular season performances*, and *summer theatre*.

Once you have defined your web groupings, make sure that each Event Group that is being displayed on your website is associated with one of the web groupings. Also ensure that you add the events that you want to appear online to the appropriate grouping. If you do not add an event to a web grouping, it will not appear online.

Step 9: Lookup List: Surcharges (Taxes)

A surcharge is an extra charge added to a TICKET ORDER. Surcharges can be for taxes, shipping, or other special levies as appropriated. They can be calculated per item (e.g. a per-ticket charge) or per order.

More details, including some suggested possible values, are at *Surcharges (Taxes)* on page 649.

Step 10: Lookup List: Discounts

Discount rates can be applied to subscriptions or tickets being sold.

For more details see *Discounts* on page 610.

Step 11: Lookup List: Venues

A venue is where an event occurs, and also has an associated seating plan.

If you hold events in a venue that can have multiple seating configurations, then define two different venues. For example, if the Central Ballroom can be configured with 40 seats or 80 seats, you could define two venues – *Central Ballroom 40*, and *Central Ballroom 80* – and give each the appropriate Seat Blocks.

Step 12: Lookup List: Seat Blocks

A seat block is a group of seats that are in a venue, typically all having the same ticket price.

Open (General) Seating: If seats are not assigned, you should define just one seat block with the number of seats required. For example, if the Central Ballroom has 80 seats, define one seat block with the first seat number *1* and the last seat number *80*.

Assigned Seating: The seat blocks that you define for a particular venue, all together, constitute a seating plan. So if the Central Ballroom can have 80 seats configured as 10 rows of 8 seats, you would define 10 different seat blocks with 8 seats in each.

For extensive details see *Seat Blocks* on page 640.

Step 13: Lookup List: Price Schemes

A pricing scheme specifies the price of each seat in a particular venue. There may be several price schemes for a single venue. You may have different pricing for Friday night performances than for Sunday matinées. You may have different pricing for one performance than for another.

For more details see *Price Schemes* on page 635.

Step 14: Ticket Layouts

In order to print tickets, you need to tell Sumac the layout of the tickets. Sumac can print sheets of tickets on pre-perforated stock, or print single tickets on special-purpose ticket printers. You tell Sumac how the format and content of a ticket by means of a Layout file. See *Layouts* on page 473.

> Hint: We can provide you with sample layouts to use as a starting point: just let us know what you need.

Step 15: Events

An event occurs at a particular place and time: a specific seminar or performance or fundraiser. An alternative perspective on an event: an event defines the inventory of tickets available to be sold.

You define Events using the Events button in the main Sumac console window.

For more details see *Events* on page 209.

Step 16: Event Groups

Event Groups let you gather together events for various purposes:

- Event groups can simplify searching. For example, to see all orders for the Spring or 2014 season, you could define an event group that holds all the events in your Spring or 2014 season.
- An event group can be presented as a production on your website, grouping together all the performances in a particular run of a production or show.

If you want an event group presented on your website, it must be part of a Web Grouping (see above).

For more details on creating event groups, see *Event Groups* on page 213.

Step 17: Configuration for Online Ticketing

If you want your organization's patrons to be able to order tickets from your website, you need to do some additional configuration. This is explained in *Appendix B – Configuring Online Ticketing* on page 529.

Step 18: Confirmation

Check Event Status

Once you have defined all the necessary information to enable you to order tickets and subscriptions, open the Events list window. Show the column named

Ticketable Status. This column tells you whether each event is set up allow someone to order tickets, both by using Sumac in your office and by using your website. If it is not possible to order tickets for an event, then *Ticketable Status* indicates why.

Try It Out Using Sumac

Use Sumac to order some tickets.

Confirm that you can order tickets for the events you want to be ticketable. When you are placing an order, and click to choose an event, the window for choosing an event lets you click a checkbox to show only events for which *Tickets can be ordered*. When you activate this checkbox, does the list of events contain the ones you expect?

Try It Out Using Your Website

Try ordering some tickets through your website. If it doesn't quite work the way you expect, see *Trouble-Shooting* on page 586

Step 19 Packages (Subscriptions)

A *package* is a combination of multiple tickets, usually to multiple events, sold for a fixed price. A common type of package is a season's pass which offers a ticket to each of several performances. A package can specify powerful rules that limit minimum and maximum tickets for each event based on rules that you specify.

Once you define packages, you can order them as part of a ticket order. In Sumac, a purchased package is referred to as a *subscription*.

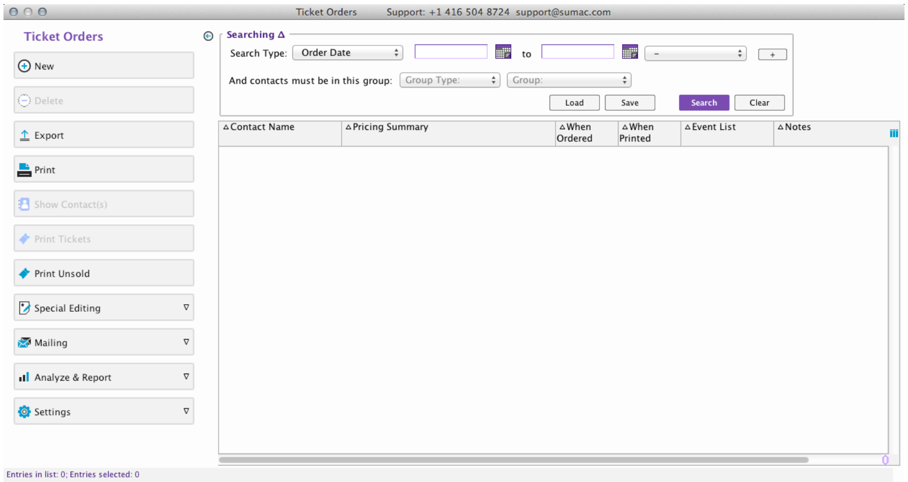
For details about defining packages, see *Event Packages* on page 214.

Step 20: Integrate With Accounting

Sumac can create ledger entries (see page 245) from ticket orders. The details of how ticket orders are ledgerized are described on page 251. Note that:

- Payments are ledgerized using account codes specified in the payment types.
- Surcharges (taxes) are ledgerized using account codes specified in the surcharges.
- Each ticket is ledgerized using the account code specified in its event. This provides considerable flexibility. For example, you can have a separate account code for each presenter's events.
- You can enter an account code in each ticket order, but if you have set up accounts in the other areas (payment types, surcharges, events) then there is no need for this account code. If, however, you do not want to specify an account in each event, the account specified in the ticket order itself will be used. A preference allows you to make account codes mandatory in ticket orders.

The Ticket Orders List



Searching

You can find ticket orders by specifying various search criteria (described in the following table) and clicking the Search button.

Note that you can also search by group: Sumac finds ticket orders that match all the other specified criteria and also whose buyer is in the chosen group of contacts.

Search Criteria	*What Is Found*
Order Date	ticket orders whose date is in a specified date range.
Ticket Order ID	The ticket order with a specified ID.
Ticket ID	The ticket order with a ticket with the specified ID. Every ticket printed by Sumac has an identification number. If you know a ticket's identification number (perhaps because you have the ticket or ticket stub), then you can search by that number to find the ticket order that it belongs to.
Event Date	ticket orders that include tickets for an event in a specified date range.
Event	ticket orders that include tickets for a specific event.
Event Group	ticket orders that include tickets for events in a specific event group.
Package	ticket orders that ordered the selected package.
Event	ticket orders that include tickets for the chosen event.
Buyer Last Name	ticket orders for contacts whose last name starts with the specified letters.
Buyer ID	ticket orders for the contact with a specific ID.
Unprinted	ticket orders that have not been printed yet
Unpaid	ticket orders that have not yet been fully paid for

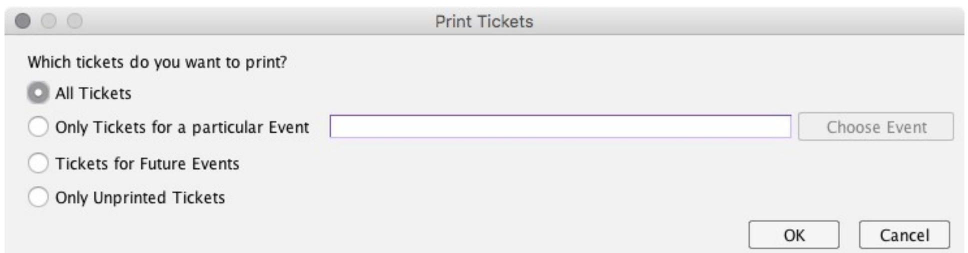
Search Criteria	What Is Found
Delivery Method	TICKET ORDERS to be delivered using a particular delivery method
Recently Viewed	Show TICKET ORDERS that have been recently created or changed.
Discount	TICKET ORDERS that had a particular discount applied.

Buttons

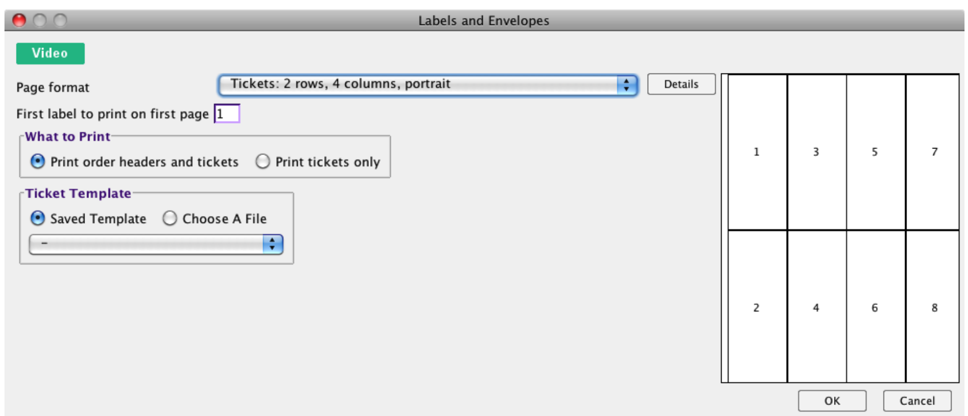
Print Tickets

Search to find the ticket orders you want to print. then click Print Tickets.

Sumac prints tickets from the list of ticket orders, but ticket orders in the list may be for different or multiple events. This dialog appears to let you choose which tickets to print, from the list of ticket orders:



You usually print tickets on special paper stock. Each TICKET ORDER is printed with a header which describes the order, followed by all the tickets that are part of the order.



Ticket Stock

Note that the above dialog provides many choices for page format, so you are able to print tickets on a great variety of paper stock, e.g. business cards, or paper with rows and columns of perforated tickets, etc.

First To Print

If you use stock that has multiple tickets per page, and allows you to use partial sheets, then you can choose which position on the page should hold the first ticket.

What to Print

Choose if you want to print the headers or just the tickets. Since you can format a ticket to have the buyer's contact information on it, printing without the headers may enable you to save paper.

Ticket Template

Choose the layout file you want to use for formatting tickets. The layout file specifies the format that you are using to print tickets. This file should be provided by your Sumac Administrator. Its file name should end with *.srl*.

You can choose from a saved template (using a drop-down menu) or from a file accessible on your computer.

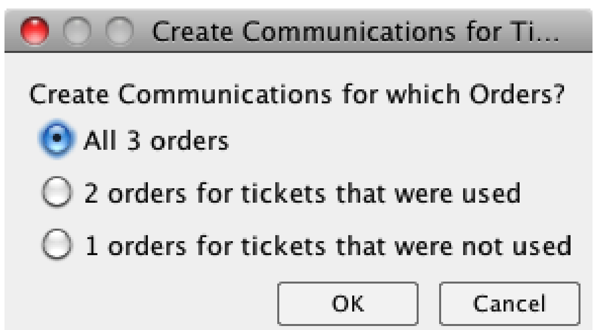
Print Unsold

This command is usually used just before a performance. It asks you which event's tickets you want to print.

Special Editing

Tickets to Communications Button

Click this button to create a COMMUNICATION record for each CONTACT who placed a TICKET ORDER for a ticket for the selected event. When you click the button, you must choose the event you are interested in, then Sumac checks to see which tickets for this event were used and which were not used. You are then given the option of creating communication records for used, unused tickets, or both:



Mailing

Email Confirmation & Tickets

Click this button to send a confirmation email to a ticket buyer, or a shipping company.

Mail Merge

You can produce one or more new documents – e.g. a personalized letter, invitation, renewal notice, or receipt – by merging data from the database, with a document template file that you have previously created. For details on how to create document templates, see the *Create Document Templates* on page 499. For details on how to do merge operations, see *Mail Merge* on page 479.

Labels/Envelopes

For further information, see *Labels, Envelopes, and Name Tags* on page 469.

Analyze & Report

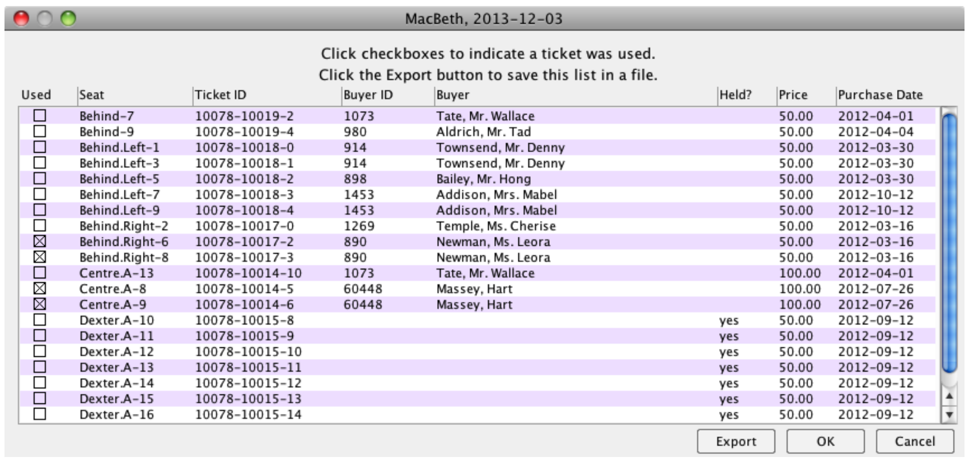
The Ticket Orders list window can show several reports. Two of them, – Financial Summary (Event) and Financial Summary (Event Group) can be automatically generated and distributed to recipients of your choice. See *Report Distributors* on page 428.

Sold Tickets

Click Sold Tickets button to produce a list of tickets that were sold for a particular event. You may optionally include the mailing addresses of the ticket buyers.

If the event was a performance at which you collected tickets or ticket stubs, you can enter into Sumac which tickets were used. This enables you to determine which CONTACTS attended the performance.

When you click this button, choose the event, and tell Sumac whether you want to include mailing addresses, then the following dialog appears:



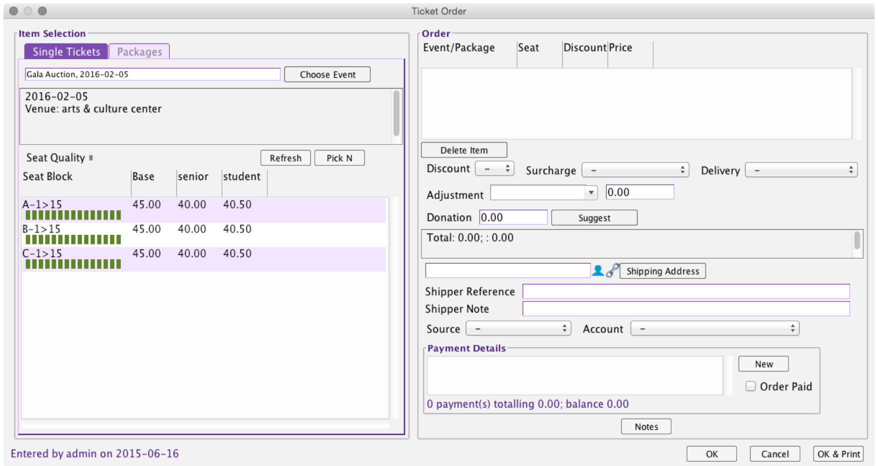
It lists all tickets, by seat number, that were sold for the chosen event. Click the check box for each ticket that was used. Click OK to save the information about used tickets into the Sumac database. Click Export if you want to put the report in to a file.

Invoices

Use the Show Invoices button to see which invoices are linked to a particular ticket order. You can also select a ticket order from the list, then click Create Invoice to add a ticket order to an invoice.

Enter Ticket Orders

To enter an order for tickets, display the TICKET ORDERS list, then click the New button. This dialog appears.



The dialog is divided into two major areas:

- the left side shows information about seat availability and allows you to add seats to an order.
- the right side contains details about a particular order.

Notice the status bar at the bottom left of the window. It shows event details if the cursor is in the Seat Selection area of the window. If the cursor is not in Seat Selection, the status bar shows who created the order and when the order was created.

Seat Selection

Use the drop-down menu near the top of the dialog to choose the event for which you wish to order tickets. If there are multiple performances of the event, then choose the correct performance from the secondary menu that appears beside the event menu. Information about the event automatically appears in the scrolling text field under the drop-down menus used to select the event.

Here are what the seat colours mean:

Green	available seat
Red	booked in another order
Yellow	part of the order being viewed or created
Black	blocked
Magenta border	the border drawn indicates a seat that matches or exceeds the specified Seat Quality

Click *Refresh* if other users may be ordering tickets for this event.

Click *Pick N* to specify how many seats you want to choose for an event. This is particularly useful if (a) you do not have assigned seating, and (b) you need to order a large number of tickets, perhaps for a school grouping that is coming to a performance.

Drag the Seat Quality slider to have Sumac highlight seats with at least the specified level of quality.

Notice that immediately to the right of the Seat Quality slider, Sumac displays the seat number of the seat that is being pointed at. This updates as you move the mouse pointer around from seat to seat.

Click seats to add a ticket to the current order or to remove a ticket from the current order.

Ticket Order Details

The right side of the dialog shows details about the current order.

It shows a scrolling list of tickets ordered. If you double click one of them, the Seat Selection information for the relevant event is displayed.

Click to select tickets then click Delete Ticket to delete selected tickets from the order.

Click to select tickets then choose from the Ticket Discount drop-down menu to apply a discount to the selected tickets.

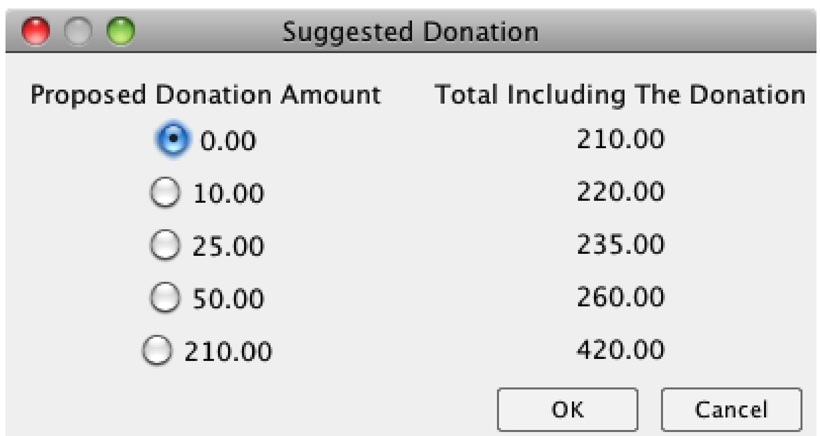
Choose from the Surcharge drop-down menu to add or remove a surcharge to or from the order.

Use the Delivery drop-down menu to specify how the order is to be delivered.

If you need to adjust the price of an order, use the Adjustment drop-down menu to choose a reason or type the reason into the field, then enter the amount of the adjustment. If you are not authorized to make adjustments, a dialog appears in which an authorized person needs to enter her user ID and password to authorize the price adjustment.

If you can talk the contact into making at donation along with the ticket order, enter the amount of the donation. Sumac creates a donation record and links it to the ticket order. It also adds the amount of the donation to the total amount to be paid, so a single payment record can be created for both the ticket order and the donation.

If you want suggestions for donation amounts, click the Suggest button to get this dialog:



Click the radio button corresponding to the amount the contact is donating, then click OK. The donation amount is put into the ticket order, and totals adjusted appropriately. Note that the proposed amounts include some round numbers and also include numbers that make the total a round number.

Click the person's head icon to identify the contact for which this order is being made. If the contact is not in the Sumac database, the contact selection dialog has a New button that enables you to add a new contact to the database. If you do not enter a contact, then Sumac considers the order to be a hold. You should enter Notes (see below) on the order to indicate what type of hold it is.

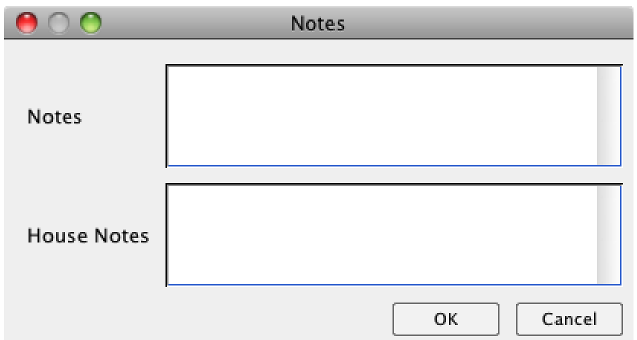
Shipping: If the order is to be shipped to a different address from the buyer's address, click Shipping Address and enter the shipping address. Note that there are also fields for entering a shipper's reference number (e.g. a waybill number), and also for a note to the shipper (like "Leave on the front porch", or "no signature required").

Use the Source drop-down menu to gather information about how the CONTACT heard about this event.

Use the Payment Details area to specify how the tickets are being paid for. Click the New button to get a standard payment window, and enter the details of the payment. If the payment is later adjusted, you can create new payment records or edit previously created ones.

Also in the Payment Details area, there is a *Payment processing is done* check box to indicate that payment processing is done for the order. Typically you would check this after processing a credit card or receiving cash or cheque payment for an order.

If there are special notes that need to be entered for the order, particularly house notes regarding special seating needs, click Notes. This dialog appears, and you can enter notes into it:



Coupons

If discount coupons have been defined in your database, then the right hand side of the ticket order shows an area for specifying coupons. You can choose up to four coupons to be applied to a single order. Sumac applies the coupons automatically, calculating the applicable discount. Note that only one coupon can be applied to a single ticket.

Special Situations

Situation	*How to Handle It*
The venue does not have assigned seating.	If there are 50 or fewer seats, define one seat block that lists all seats for the event. For convenience in the user interface, if there are many seats, define multiple seat blocks each with 50 seats. Then the seats will all show in the seat selection list without horizontal scrolling.
Seating arrangements at the venue change depending on the type of event	Define multiple venues with different names that indicate the event type. For example, a physical venue that holds rock concerts and hockey games can be defined as two venues: ◆ Arena (concert) ◆ Arena (hockey)

Situation	*How to Handle It*
Credit back a payment	When you double click to edit a ticket order, if you click to select a payment record then click New, the newly created payment record has the same details as the one that was selected. The amount field in the new record will be the same as in the selected one, and you can put a minus sign in front of it to indicate a credit, and perhaps change the amount if only part of the payment is supposed to be credited back.

Time Dockets

Introduction

Time dockets record the time spent on a particular program by a particular contact. The time can also be related to a client. If you diligently gather time dockets, then Sumac reports can identify the total effort spent on particular programs and in particular time periods.

Notes for the Sumac Administrator

Field Preferences

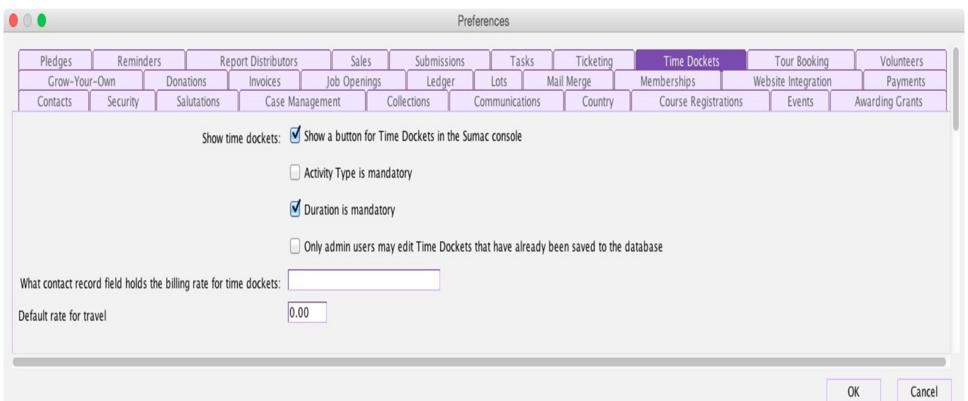
Use the Utilities/Customize Database/Field Preferences command in the Sumac console to:

- re-label fields
- completely remove fields from the user interface
- make fields mandatory, or
- determine which fields should appear on a website.

in Time Dockets.

Preferences

Use the Utilities/Customize Database/Preferences command in the Sumac console to get the Preferences dialog. Click the Time Dockets tab.



Click the check box to indicate that you want time dockets to appear in the Sumac console window.

You can choose whether two fields (Activity Type and Duration) are mandatory fields when entering a time docket.

If you use Sumac to track billable time, enter the name of the extra field that holds the billing rate in each CONTACT record. This enables Sumac to use the billing rate when you use Mail Merge to generate invoices.

If you enter travel into time dockets, you can specify a standard reimbursement rate for travel distance. Enter the amount paid for each mile or kilometre travelled.

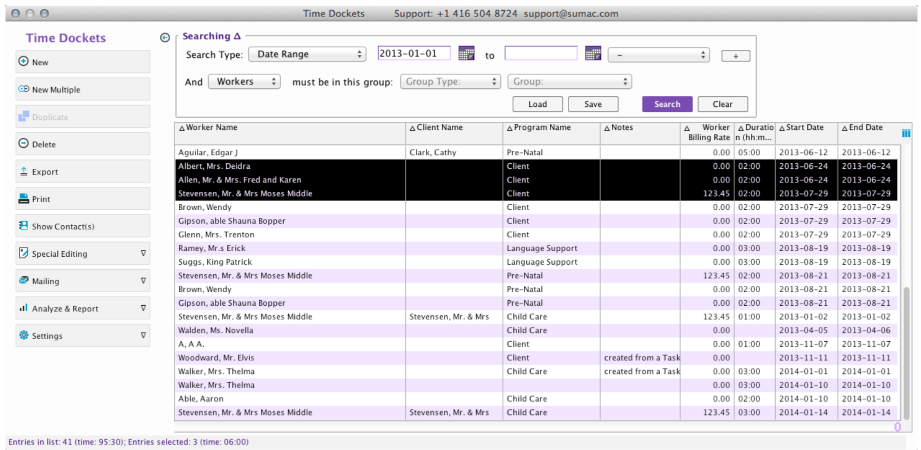
> Hint: The travel reimbursement rate entered in this tab also applies to travel entered in Tasks.

In the Security tab of the Preferences window, you can set check boxes to tell Sumac to automatically log the creation, editing, and deleting of Time Dockets.

The Time Dockets List

You can view the Time Dockets list by clicking the Time Dockets button in the Sumac Console, or by clicking the Time Dockets button in the TASKS list. Clicking either of these buttons presents a list of time dockets.

If a single CONTACT was selected in the TASKS list when you click the Time Dockets button, then this Time Dockets list is restricted to showing only time dockets for the selected CONTACT, and the window title bar shows the CONTACT'S name and ID.



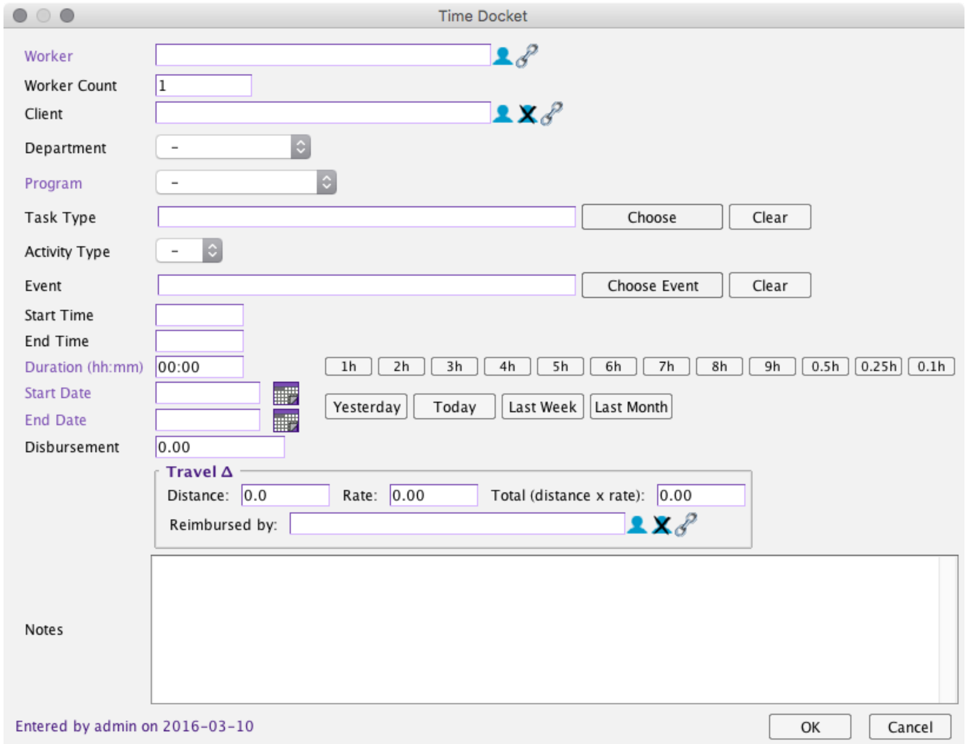
Note that the status bar at the bottom of the window shows the total time, as well as the number of time dockets in both the whole list and the selected entries in the list.

Enter Time Dockets – Contacts List

The Add To Contact button in the contacts list lets you add an identical time docket record for many contacts at once.

Enter Time Dockets – New

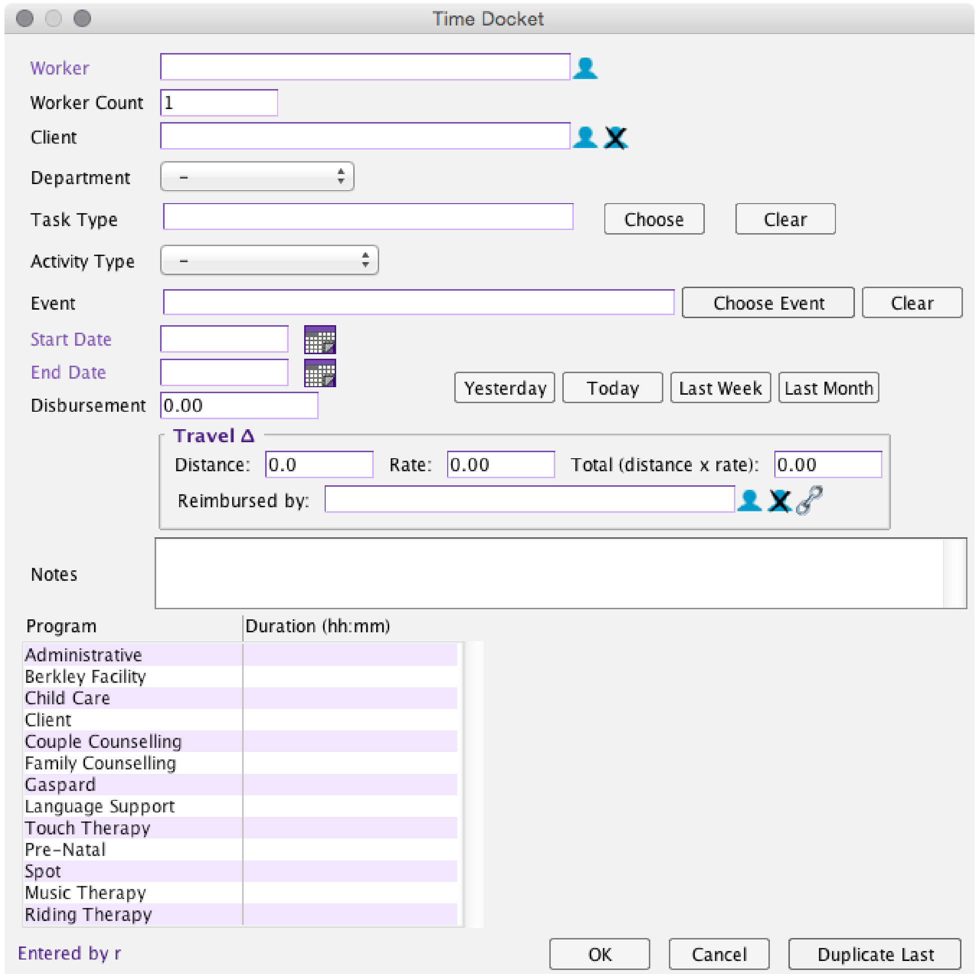
When you click the New button to create a time docket, this dialog appears:



Note that there are buttons to speed up the entry of common time dockets. All these buttons have keyboard equivalents to further enhance speed.

Enter Time Dockets – New Multiple

If you click the New Multiple button, this dialog appears:



This dialog allows you to rapidly enter time performed in different programs by a single worker, optionally for a single client. If your workers often do several things, perhaps for a single client, this saves a lot of data entry time.

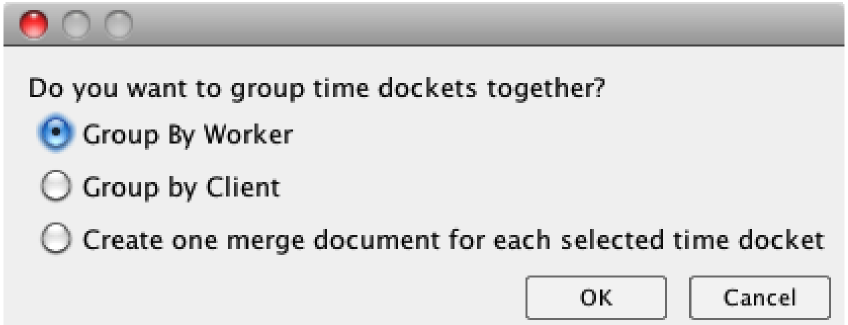
Reports

The Analyze & Report group of commands provides reports that are produced as HTML. In addition, the Reports button in the Sumac console has several time docket reports.

Special Mail Merge Considerations

Aggregating Multiple Time Dockets

When you mail merge with time dockets, Sumac can aggregate the time dockets, producing one mail merge document for several time dockets. When you click Mail Merge in the Time Dockets list, you are asked if you want to group time dockets together:



You can group them by worker or by client. When you do this, Sumac creates one document for each worker (client) and that document holds all the time dockets for that particular worker (client).

To have the time dockets appear as a list in the merge document, you should use the LI syntax (see *List Item Formulas* on page 506) for a merge formula. Use the total syntax (see *Total Of A Field In Sub-items* on page 395) to produce summary values.

Here is an example which summarizes work done by several workers and could be used if a document was for a particular client:

```
<<LI {e_Worker_Name;e_When_Start;e_Duration}>>
total duration: <<__e_Duration>>
```

Billing Rates

If you wish to generate invoices from time dockets, there are mail merge fields (see *Variables Representing Information From Time Docket Records* on page 523) that support automatically getting billing rates from worker and client records. Sumac can also automatically choose the appropriate billing rate and multiply it by the time spent to get a total bill amount.

Tour Booking

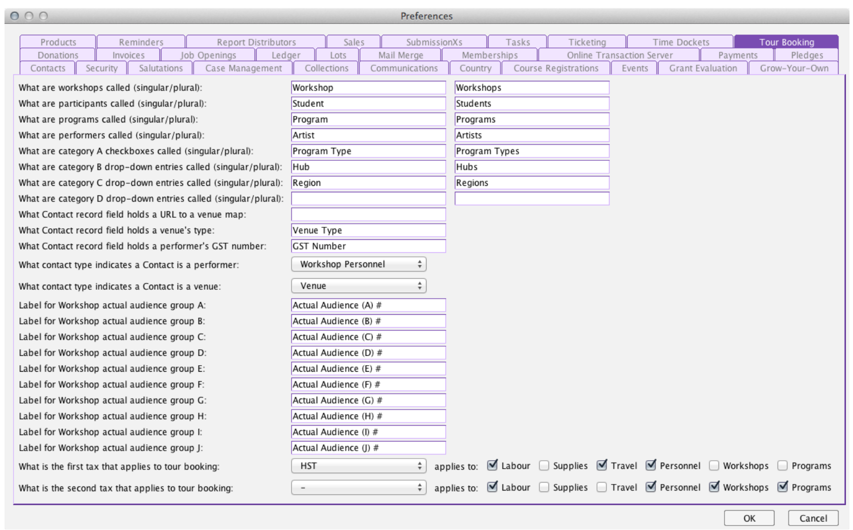
Introduction

Sumac Tour Booking enhances Sumac to enable it to help non-profit organizations which perform tours in a variety of venues. For example, an authors assembly that arranges authors to speak in long-term care facilities, or an opera company that places opera singers in school class rooms. Tour Booking assists with:

- scheduling one or more performers
- generating and paying performer invoices
- billing venues where performances occurred
- allocating contributions (e.g. grants) to multiple performances.

Notes for the Sumac Administrator

Use the Utilities/Customize Database/Preferences command in the Sumac console to get the Preferences dialog. Click the Tour Booking tab.



Here is what the various fields are used for:

Field	*Description*
What are workshops called	A program can contain one or more workshops. To better fit your terminology, you may call a workshop a performance, a presentation, a seminar, or any other appropriate term.
What are participants called	Participants are the audience – the people who attend the workshops.
What are programs called	A program, consisting of one or more workshops, may be called a variety of things.
What are performers called	The performers at a workshop may be authors, actors, artists, singers, players, or any variety of terms. Specify what Sumac should call these people.

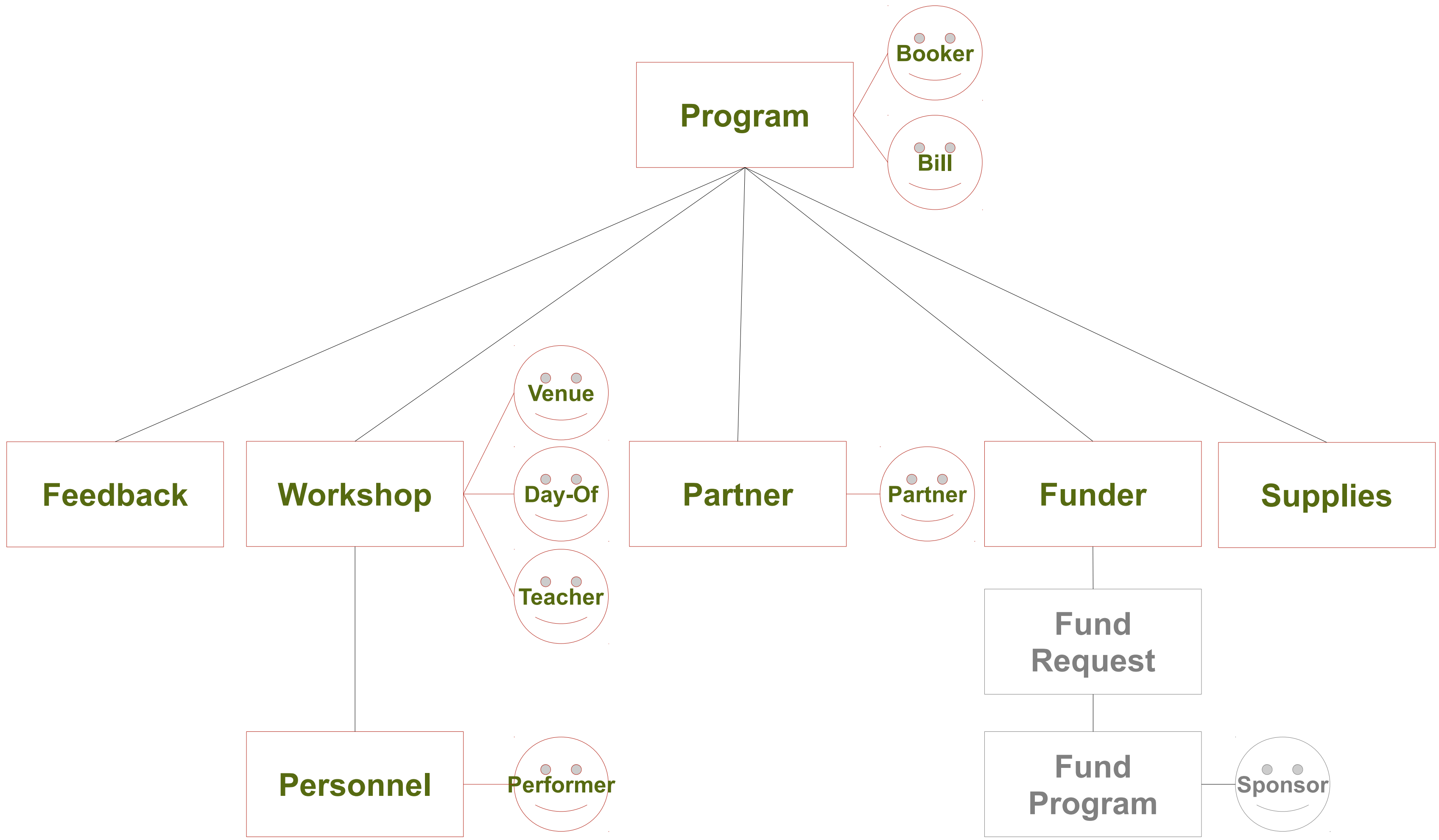
Field	*Description*
What are category A check boxes called	Programs can be categorized using a group of check boxes. These work much like CONTACT types: any contact can have one or more check boxes selected. Similarly, any program can have one or more category A check boxes chosen. You can specify what these program type check boxes should be called. The Utilities/Customize Database/Lookup Lists command in the Sumac console is used to specify the labels for the check boxes.
What are category B, C, and D drop-down entries called	Programs can be categorized by values in up to three drop-down menus. If you enter a name for the category, then the drop-down menu appears with that name. If you do not enter a name for the drop-down, then the corresponding menu is not visible in the window for editing programs. The Utilities/Customize Database/Lookup Lists command in the Sumac console is used to specify the values that go in the category B, C, and D drop-down menus.
What Contact record field holds a URL to a venue map	The Tour Booking module allows a CONTACT record to be identified as a venue. If the CONTACT records have an extra field which holds a URL for a map giving directions to the venue, then specify the name of the extra field, so that Sumac can automatically identify that field.
What Contact record field holds a venue's type	If you wish to divide venues into different types – school, hospital, community centre, etc. – then specify the name of the extra field, in CONTACT records, that holds the venue types.
What contact type indicates a Contact is a performer	When someone using the Tour Booking module is asked to choose a performer, Sumac can limit the list of CONTACTS to show only the performers. Sumac knows which CONTACTS are performers because they have a particular contact type. Specify which contact type indicates a CONTACT is a performer.
What contact type indicates a Contact is a venue	In Tour Booking, a venue is a CONTACT record. To restrict the list of CONTACTS displayed when a user is asked to choose a venue, make all the venues a particular contact type, and tell Sumac which contact type it is by choosing it in this dialog.
Label for Workshop actual audience group A to J	You can specify actual audience figures for any particular workshop. This is where you can name each of the ten audience count fields.

Field	*Description*
What is the first (second) tax that applies to tour booking	If taxes (e.g. sales tax, value added tax) apply to amounts entered for labour (fees), supplies or travel, specify here the first (second) surcharge to be used. Also indicate if this tax applies in personnel, workshop, and/or program records.

Overview

The diagram on the next page shows the structure of the information managed by Tour Booking. Here are the key points to note:

programs (course, lecture series, etc.)	Contains information about a particular program. Information includes: billing (one or two billing contacts and amounts for each), workshops, funders, partners, supplies, and feedback. Any program can be used as a template, so that similar programs can be created instantly.
contacts (circles in the diagram)	Contacts can be related to Tour Booking in eight different ways: ◆ Program Booker ◆ Program Billing Contact ◆ Program Partner ◆ Program Funder ◆ Workshop Venue ◆ Workshop Day-of Contact ◆ Workshop Teacher ◆ Workshop Personnel

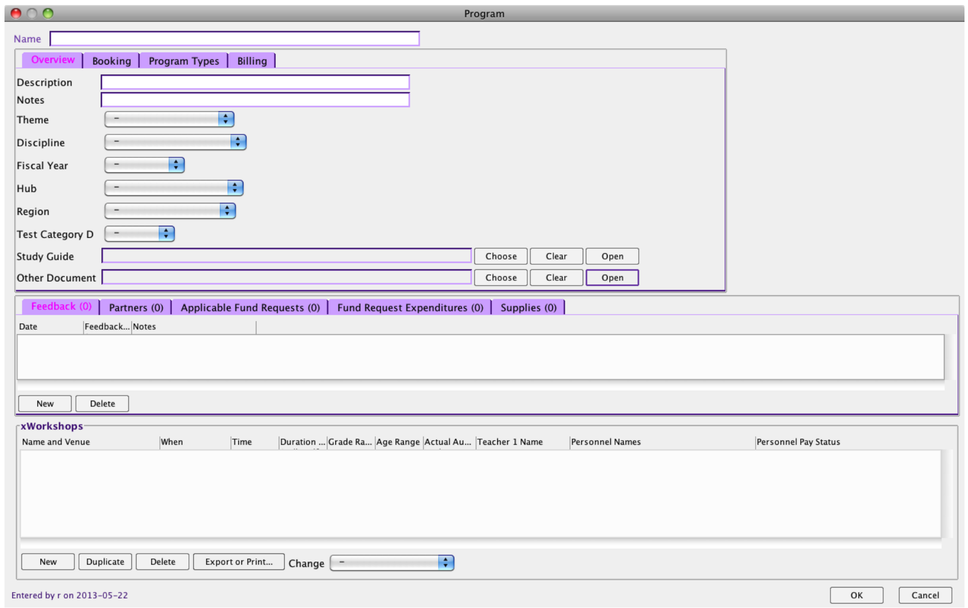

Program
Booker
Bill
Feedback
Workshop
Venue
Day-Of
Teacher
Partner
Partner
Funder
Supplies
Fund Request
Fund Program
Sponsor
Personnel
Performer

Programs

Descriptive Fields

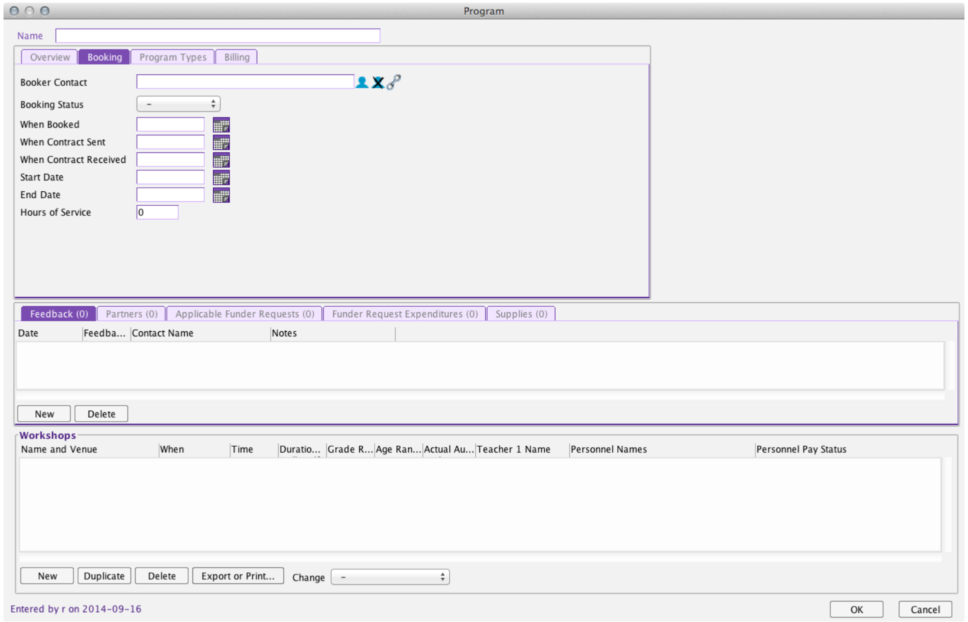
Sumac can hold a lot of information about a program. There are three main areas in the Program dialog:

- The top tabs – Overview, Booking, Program Types (may be renamed), and Billing – contain groups of fields of data.
- The middle group of tabs – Feedback, Partners, Funders, and Supplies – each contain a list of items, individually editable.
- The bottom area lists the workshops that are part of the program. A workshop entails one or more personnel putting on a performance or class at a particular time and place.



The Overview tab in the picture above shows mostly classification information that describes the program. Note that a Sumac Administrator can add up to three drop down menus to this tab by defining the generically named Category B, Category C, and Category D lookup lists. In the picture above two of these have been renamed to Hub and Region; the third is not in use so it does not appear in the window.

If you click the Booking tab, the Program dialog changes to this:

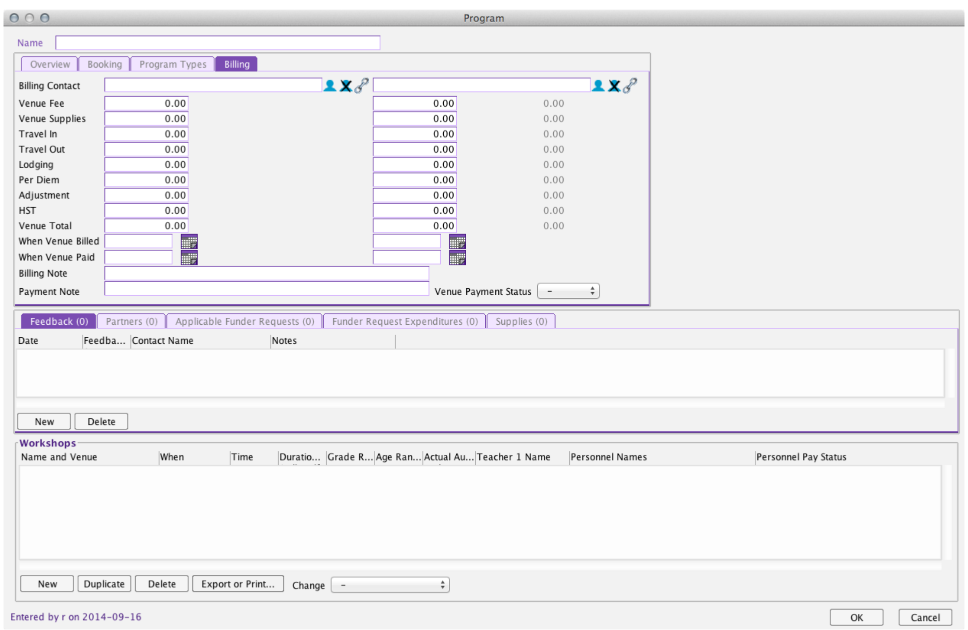


You can choose a contact, indicate the booking status, and record when the program was booked, when the contract was sent and received back, and a date range for the workshops being delivered. If you are committing to a certain number of service hours, you can record that too.

> Hint: If a program record is being used as a template, it would typically not contain any booking information.

The Program Types tab (which can be renamed) contains check boxes that can be used to further classify a program.

Click the Billing tab to see its contents:



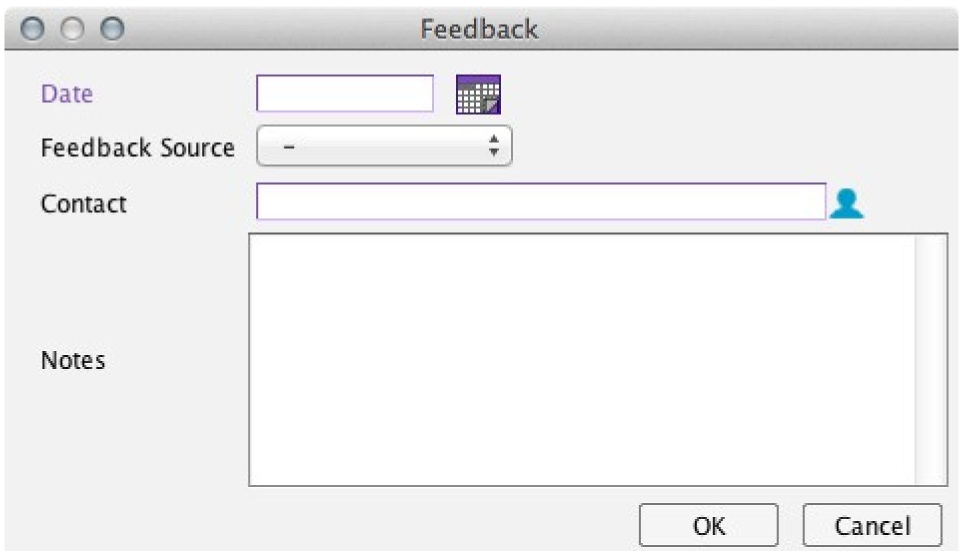
The billing tab lets you choose one or two billing contacts, and specify the amounts to be billed to each of them. The grey numbers on the right hand side show the totals of amounts in the personnel records in the workshops in this program.

Lists of Related Information

The middle group of tabs lets you add lists of information related to a program. Each of these lists has a New button to add new entries to the list, and a Delete button that removes the selected entries from the list. Here are descriptions of the data in these lists.

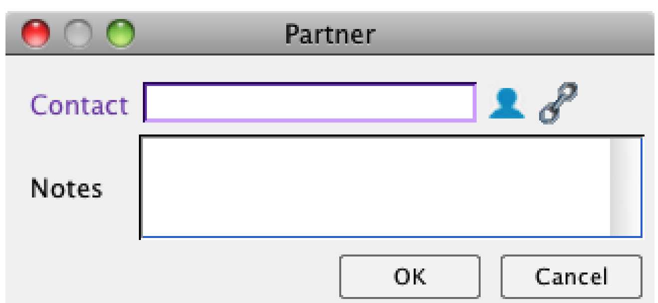
Feedback

Specify the date, the source of the feedback, a contact who provided the feedback (if there was one), and a textual description of what feedback was received.



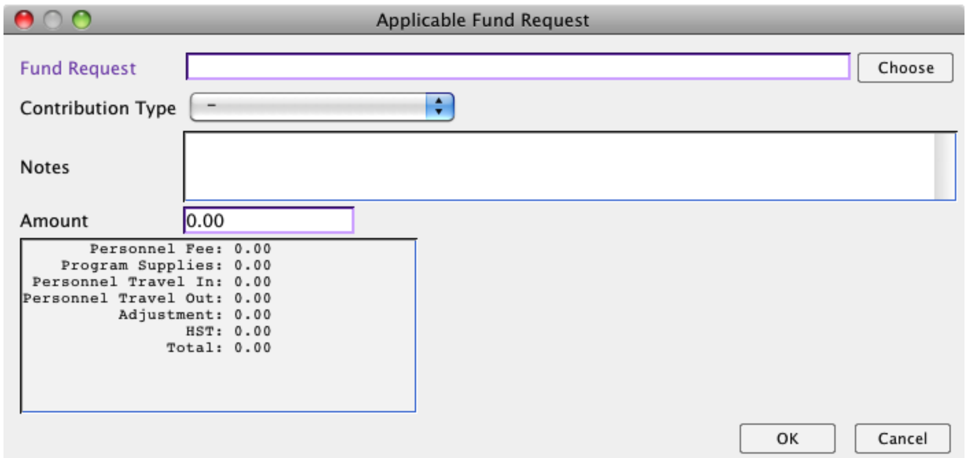
Partner

Click to choose a CONTACT which is acting as a partner in delivering this program.



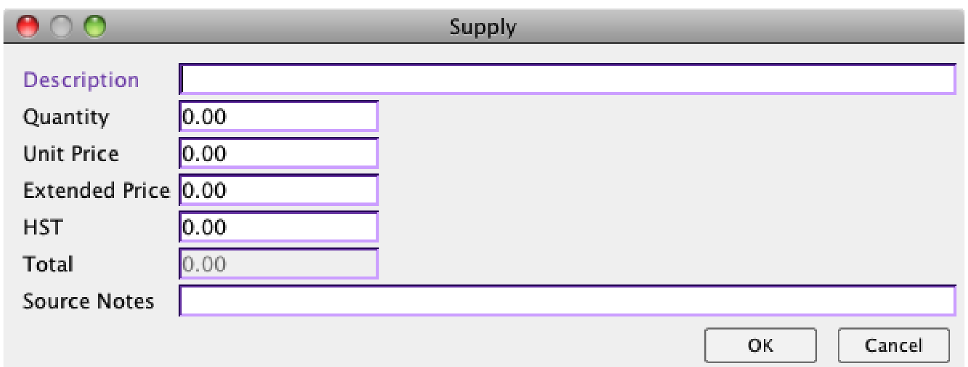
Applicable Funder Request

In Sumac, a funder is identified by choosing the (successful) funder request under which funds are being disbursed to the program. If your installation of Sumac does not have the Funder Request module, then the Funder tab does not appear in the Program dialog.



Supply

Supplies are consumable materials used in the course of delivering a program. Paint, paper, clay.



Note that quantity can be fractional. You may use half a can of paint, or a quarter of a roll of paper. Unit Price is the price of a unit (a can, a roll, a box) of the consumable. Extended Price, calculated by Sumac, is the Quantity multiplied by the Unit Price.

Use the Source Notes field to record where the consumables came from: perhaps an invoice number or shipping receipt reference.

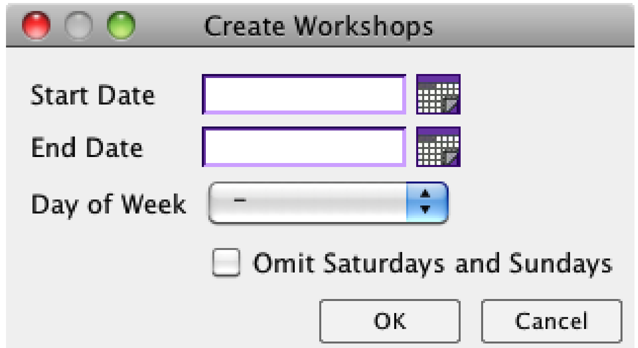
Workshops

A program can contain one or more workshops. A workshop is a performance, presentation, course, seminar, class, or other actual deliverable work.

Create A Workshop

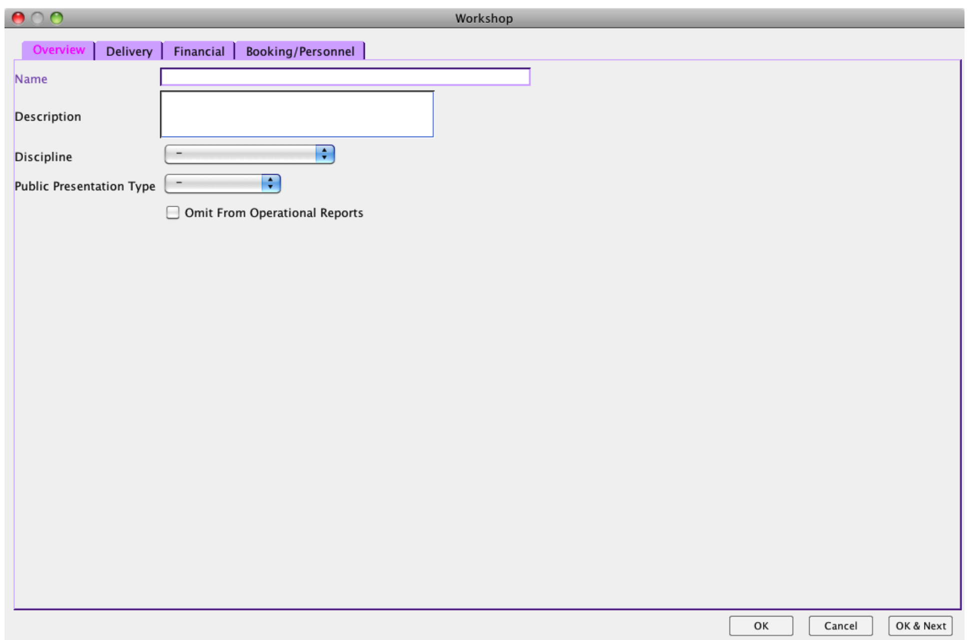
You can click the New button to create a new workshop within a program. Alternatively, select an existing workshop, and click the Duplicate button. You are asked if you want one or several duplicates. Click One to create and edit a single duplicate workshop.

Click Several to get this dialog, which allows you to specify several workshops in a range of dates (e.g. from July 1 to July 31), perhaps only on a particular day of the week. You can also tell Sumac to not create workshops on weekends.



A Workshop

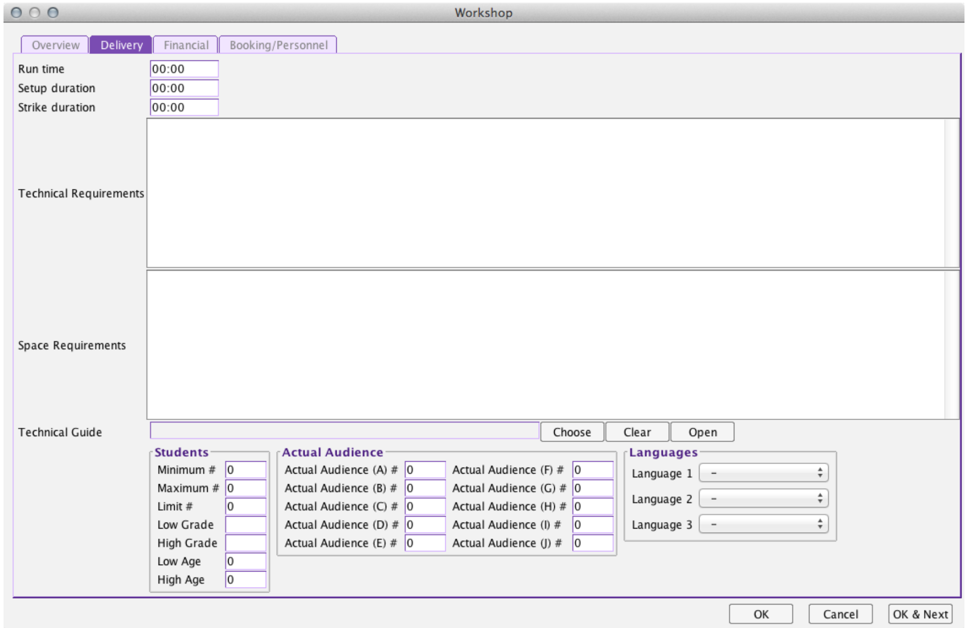
The dialog for editing a workshop looks like this:



The Overview tab allows you to specify some basic descriptive information about a workshop. The Omit From Operational Reports causes this workshop to be omitted from:

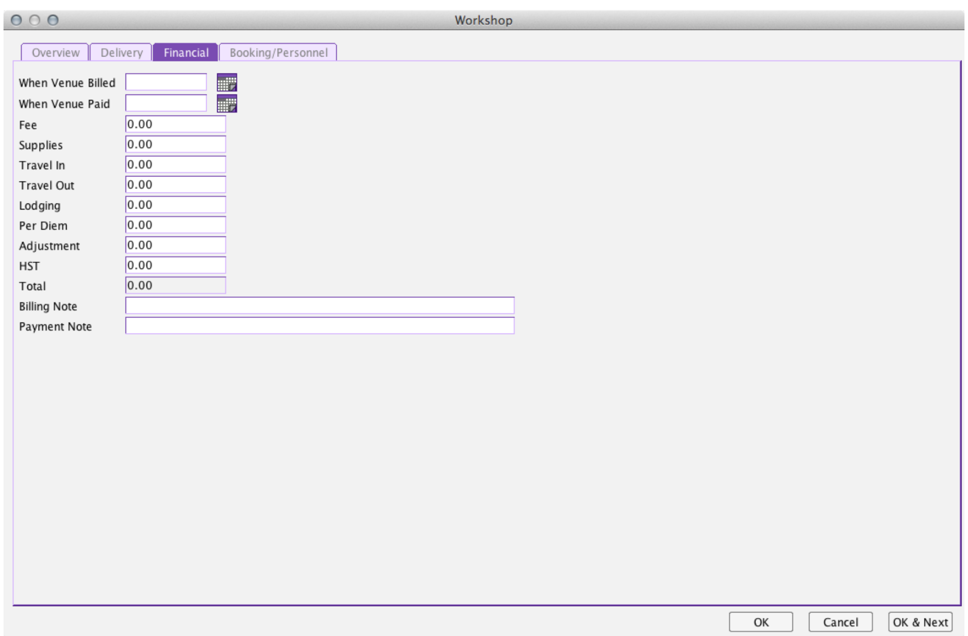
- The report produced by the Statistics button in the programs list.
- The report produced by the Programs button in the funder requests list.
- The *Tour Booking - programs by funder request* report.

The Delivery tab contains information about how the workshop can be or was delivered:

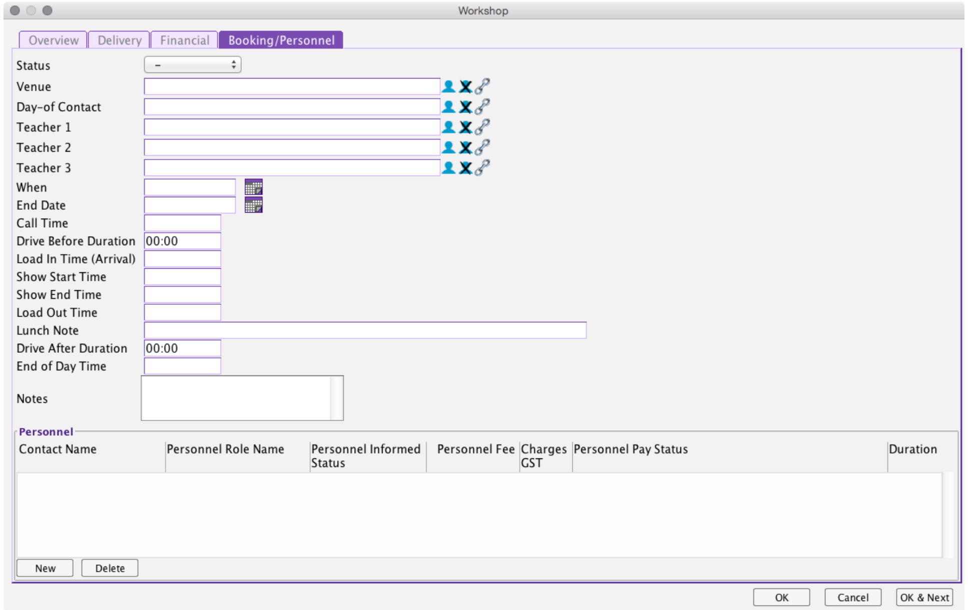


Note that the Low Grade and High Grade can be alphabetic as well as numeric. This enables you to enter grades like *JK* and *K* for junior kindergarten and kindergarten.

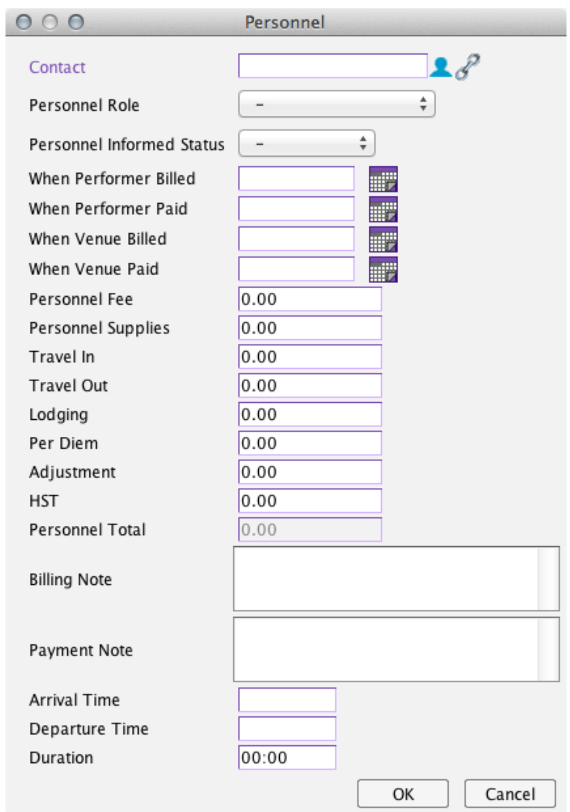
The Financial tab holds information about the amounts to be billed for this workshop:



The Booking/Personnel tab shows information about when the workshop is taking place. It also lets you enter CONTACTS relevant to the day of the workshop (day-of contact and up to three teachers).



The Booking/Personnel tab also allows you to identify personnel who are presenting the workshop. Click the New button to add a personnel record, then choose the CONTACT, and fill in other relevant fields:



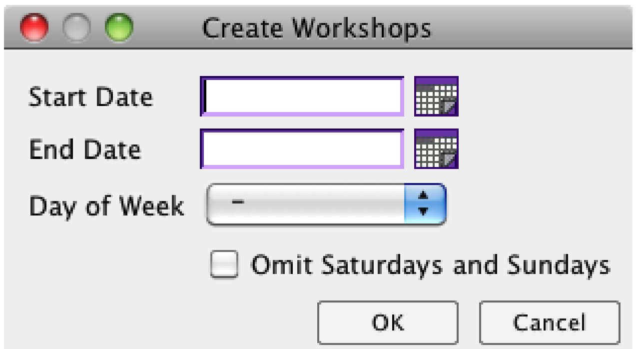
Duplicate

The Duplicate button at the bottom of the workshops list in the program window allows you to create one or more copies of a selected Workshop.

Click to select the workshop then click the Duplicate button. Sumac asks if you want to create one or several copies of the selected workshop.

If you choose *one* then you are presented with the window for entering a new workshop, all filled in with the details from the selected one. Make changes as required, then click to save the new workshop into the program.

If you choose *several*, then this window appears:



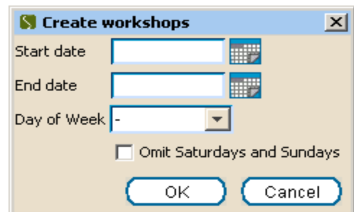
Specify a date range for the new workshops. Specify if they should be on a certain day of the week (if not, Sumac creates one for every day in the date range). Specify if Saturdays and Sundays should be omitted. When you click OK, Sumac creates the new workshops. Note that Sumac will only create at most 20 new workshops; if you need to create more, create the first 20 then click Duplicate again to create additional workshops.

Export or Print

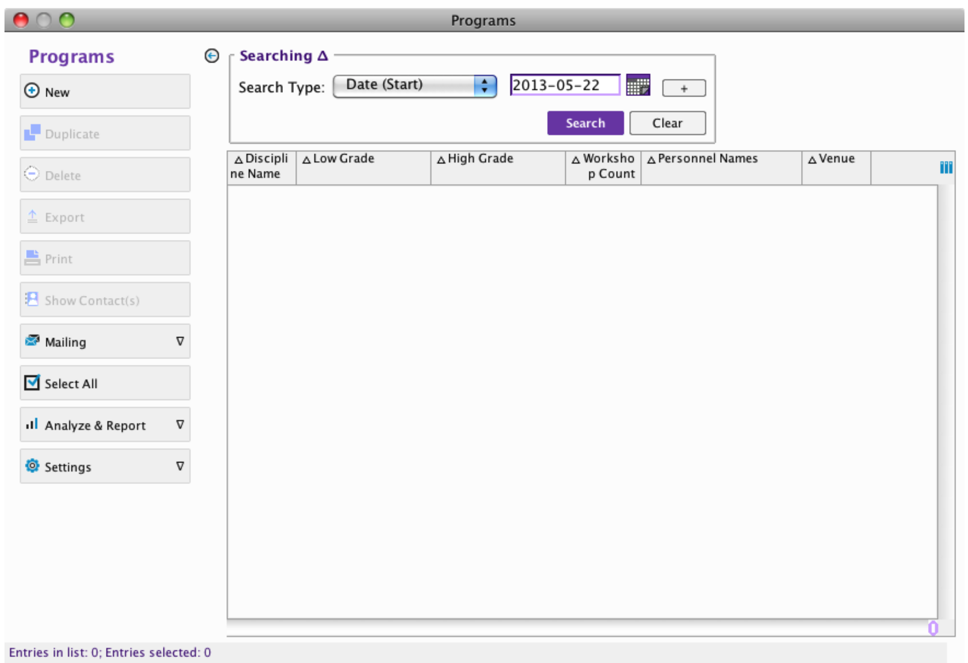
This button presents the standard window for exporting and printing. It applies to only the workshops in the program being displayed.

Change

This drop-down menu contains commands which are applied to all workshops in the program.

Command	*What it does*
Add Personnel	Displays a window for defining a new personnel record. If you enter details then click OK, the same personnel record is entered into all workshops.
Remove Personnel	Lets you choose a contact from a list of personnel. Then removes all personnel records with that contact.
Set Start Time	Sets the start time for all workshops.
Set End Time	Sets the end time for all workshops.
Set Date	Displays this dialog:  so you can specify the dates for all workshops.

Programs List Buttons

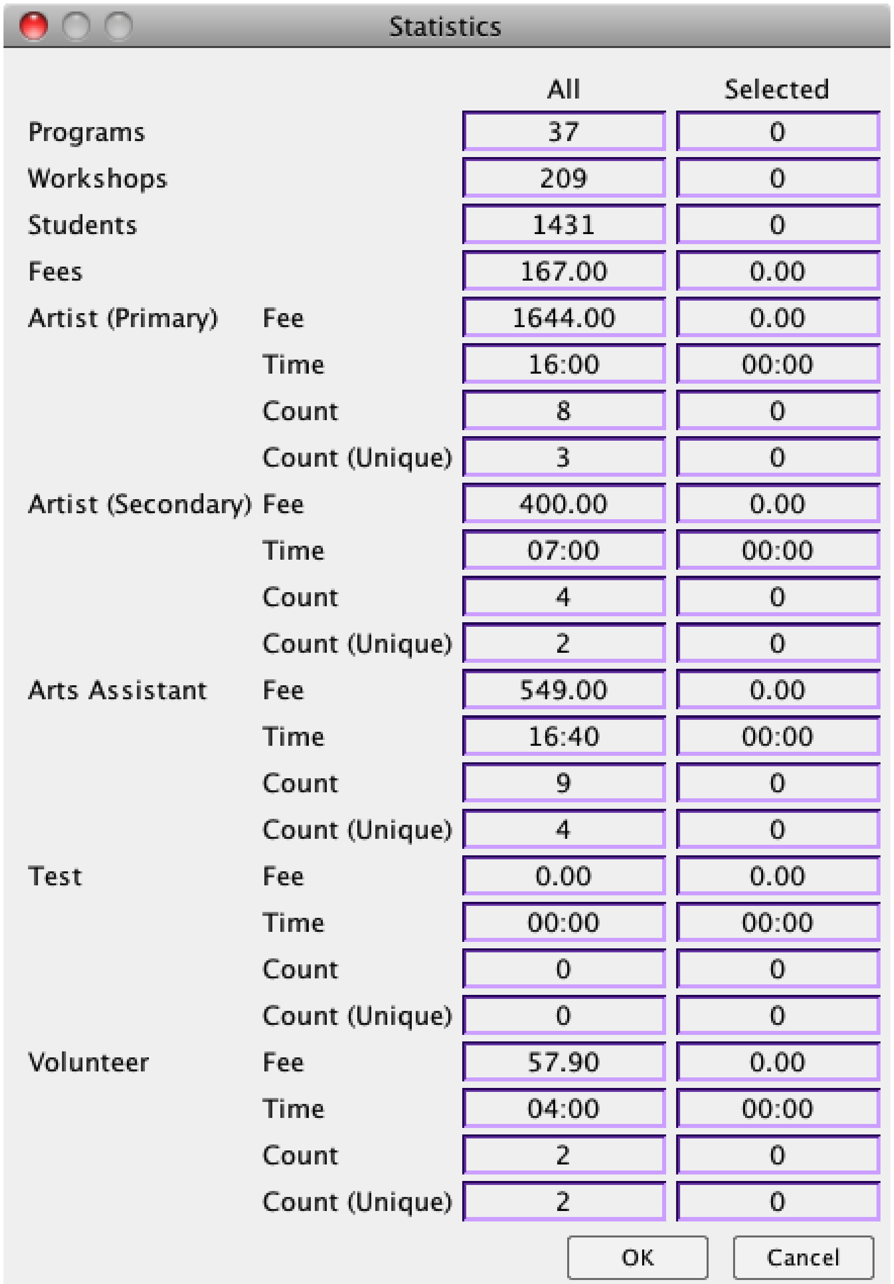


Mail Merge Button

Mail merge from the programs list supports special formulas that enable document templates to show information from a program's workshops. For details see *Mail Merge From Programs List* on page 395.

Statistics Button

The Statistics button gathers summary information about all the programs in the list and also about those that are selected. It then displays the information as follows.



Note that *Artist (Primary)*, *Artist (Secondary)*, *Arts Assistant*, and *Volunteer* refer to roles in personnel records in the workshops.

Explore Button

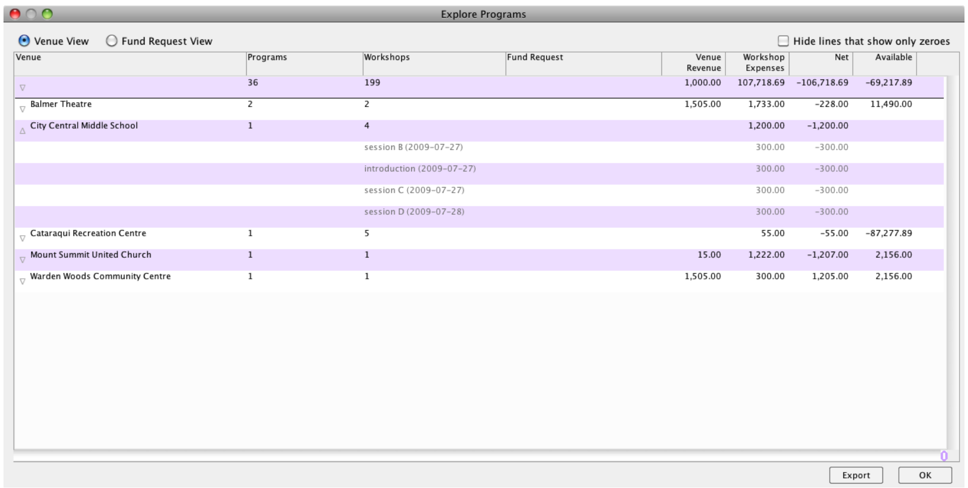
This button lets you explore financing opportunities for programs. It presents information organized by venue or by funder request. You switch between these two views by clicking the appropriate radio button at the top of the window.

In either view, if you want to suppress the display of lines that contain all zero figures, you can click the check box in the top right corner of the window.

The Export button at the bottom of the window saves the data, that is showing in the selected view, to a tab-delimited text file.

Venue View

This view shows a financial summary, by venue, of the programs that were chosen when the Explore button was clicked. Click to expand a venue and see the details under it.



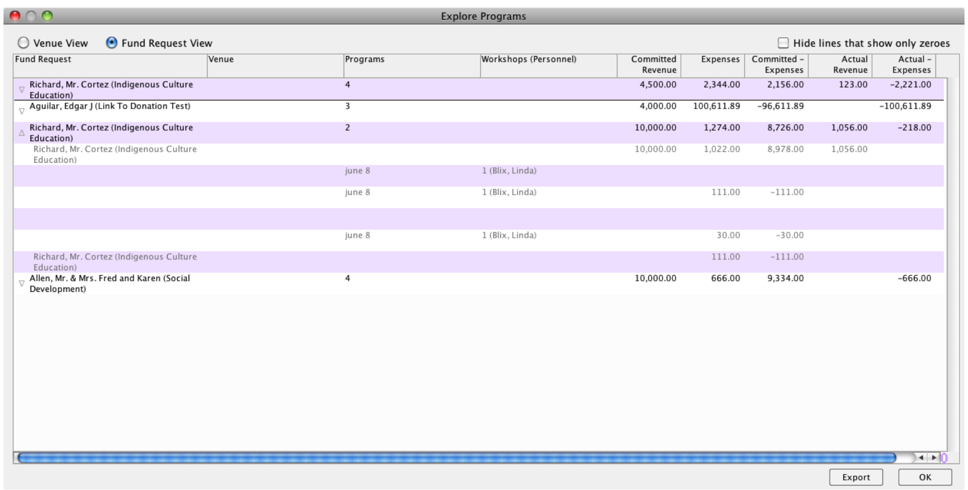
Column Heading	*Contents Displayed*
Venue	The name of each venue. There may also be a line with no venue name if one or more programs' workshops do not identify a venue.
Programs	The number or names of programs at this venue.
Workshops	The number or names of workshops at this venue.
Funder Request	Shows funder requests available to contribute to programs at the selected venue.
Venue Revenue	This shows revenue expected to be received from the venues. It is the amounts in billing tabs in programs associated with the venue.
Workshop Expenses	The sum of amounts in the Financial tab and the personnel records of all workshops associated with the venue.
Net	The Venue Revenue column minus the Workshop Expenses column.

Column Heading	*Contents Displayed*
Available	For each program associated with the venue, find all funder requests associated to the programs by entries in the Funder tab of the program. Available revenue is the Received Amount of each funder request, less expenditures recorded against the funder request.

Each venue has an expansion-contraction icon in front of its name. Clicking to expand causes Sumac to show the details that add up to the figures calculated for each venue. The expansion of Expenses will be broken down by personnel role.

Funder Request View

Expanding a funder request shows its budget lines (revenue) and expenses (by venue).



Here is what is in each column:

Column Heading	*Contents Displayed*
Funder Request	Name of the funder and funding program for the funder request.
Venue	Name of a venue for a program being funded by the specified funding program.
Programs	Number or names of programs in the venue.
Workshops (Personnel)	Number of workshops and personnel in each of the programs.
Committed Revenue	The Received Amount field of the funder request.
Expenses	Total of amounts from expenditure lines in the funder request – amounts that have been spent under the funder request.

Column Heading	*Contents Displayed*
Committed - Expenses	The Committed Revenue column minus the Expenses column.
Actual Revenue	The sum of amounts that have been actually received (donations) under the funder request.
Actual - Expenses	The Actual Revenue column minus the Expenses column.

Report Drop-down Menu

This menu provides a Feedback report, which summarizes the feedback records in the (selected) programs.

Workshops Calendar View

In the Sumac Console there is a Workshops button that shows workshops in a calendar view. Click a cell to see the workshop in the context of the program that contains it.

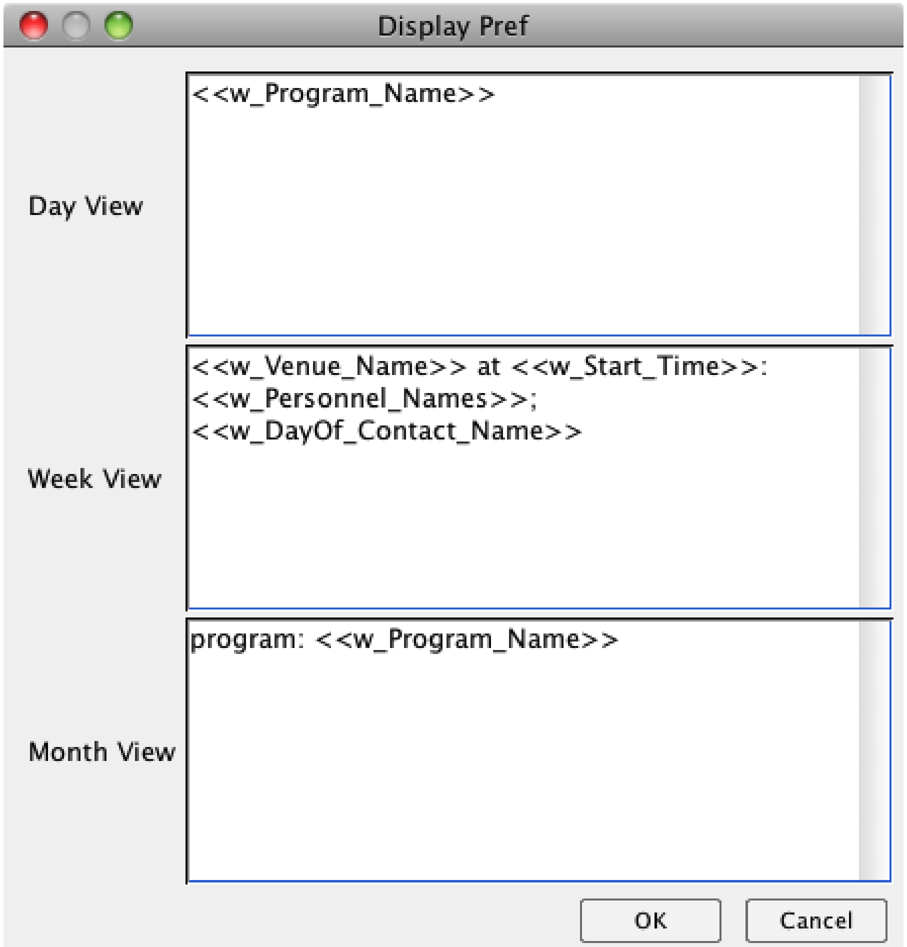
Navigating in the Workshop Calendar

The Workshop Calendar starts in a Week view, but you can click radio buttons to change it to show Day and Month views. You can also click row and column titles to move from one view to another. Clickable titles have a shaded appearance like a button.

Current View	*Click Row Title*	*Click Column Title*
Day	–	Month view
Week	Week view	–
Month	–	Day view

Telling Sumac What to Show in Each Cell

When Sumac displays the contents of a cell in the Workshop Calendar window, it actually does a mail merge to generate the contents of each cell. You can specify the templates it should use by clicking the Display Prefs button in the Workshop Calendar window. When you click it, you get a window like this:



You can specify a different set of fields to display for each of the three views: day, week, and month. For assistance in creating these three templates, use the Utilities/Template/Mail Merge Codes command in the Sumac Console. Remember that only workshop data is available to Sumac when it is creating the content for a cell, so choose only fields from the Workshop menu in the Mail Merge Codes dialog.

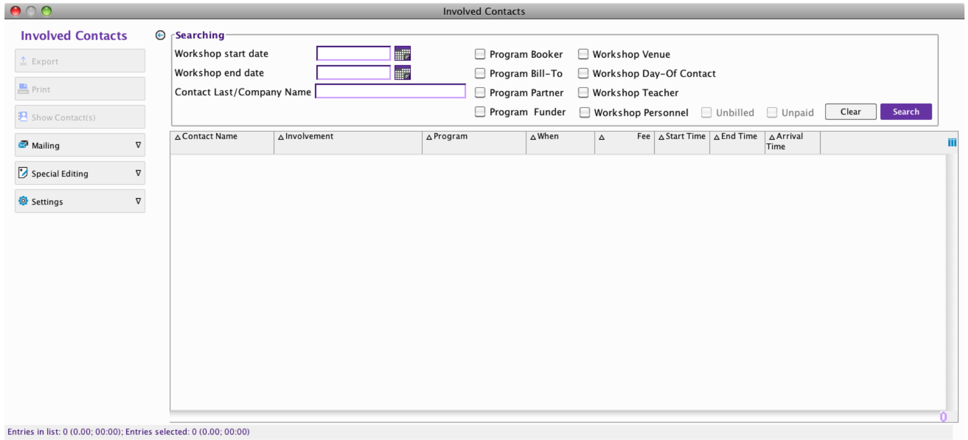
Special Display Considerations

In the calendar, workshops show grey if their booking status indicates that they should. If a workshop has no booking status, then the booking status of its parent program is used.

In the calendar, and also in the single program list of workshops, if you show the personnel associated with a workshop, Sumac may insert a bullet (●) after the name of an individual personnel. The bullet indicates the contact is owed money (has not been paid).

Involved Contacts

CONTACTS can be associated with Tour Booking information in several different ways. This is illustrated by the diagram on page 379. In the Sumac Console use the Involved Contacts button to find CONTACTS who are involved with programs and workshops.



Start by doing a search for contacts associated with tour booking. You must click at least one of the eight check boxes which indicate the “roles” that contacts can have with respect to programs and workshops. If you search for *Workshop Personnel*, you can also click that you wish to find only those that have not yet billed your organization, or those that you have not yet paid.

Special Features of the Involved Contacts List

When you double click an entry in this list, Sumac shows you the program, and perhaps the workshop and personnel record, with which the contact is involved.

You can directly edit the fee amount in the list itself. This saves time since you do not have to double click to open the record, edit the amount, then click OK to save the record. When you change the fee amount, applicable, taxes and a new total are recalculated too.

The Bulk Edit button that lets you set dates in several records at once – another time saver.

The Mail Merge button allows you to use document templates with special formulas so that you can aggregate many records together. For details, see Mail Merge From Involved Contacts List on page 395.

The Charge Funder Request button allows you to charge amounts from personnel records directly to a Funder Request. Note that the Funder Request must be one that is listed in the Applicable Funder Requests list in the Program that contains the workshop that contains the personnel record.

The status bar at the bottom of the Involved Contacts list window shows fees and the total of the time worked.

Mail Merge

Mail merge operations in the Tour Booking module work the same as in other modules. However, the syntax of formulas has been extended. The extensions relate to producing lists of sub-items within an item. In particular when doing a Mail Merge operation

from this list:	these sub-items can be listed:
Programs	Workshops
Involved Contacts	Personnel Records

There are two extensions to formulas. One to enable the listing of fields from sub-items, and one to enable totalling of the fields from sub-items.

Listing Sub-item Fields

You can list fields for all the sub-items by using a formula with this syntax:

```
<<LI {fields}>>
```

where *fields* is a list of field names from the sub-items, separated by semicolons. The content put into the resulting document is one line for each sub-item and, in each line, the values of the listed fields separated by tabs.

For example, if you do a mail merge from the programs list, this formula:

```
<<LI {x_Name;x_Total}>>
```

shows the names and total amounts for the sub-item workshops.

If you do a mail merge from the involved contacts list, this formula:

```
<<LI {w_When;w_Venue_Name;w_Name;z_Amt_Fee;z_Amt_Total}>>
```

shows the date, venue, workshop name, fee and total amount for each involved contact record

Total Of A Field In Sub-items

Sometimes you want to include in a document the total of a field in all the sub-items. To do this, put two underscore characters in front of the name of the sub-item field to be totalled.

For example, if you do a mail merge from the programs list, this formula:

```
<<__x_Total>>
```

shows the sum of all the total amounts for all the sub-item workshops.

If you do a mail merge from the involved contacts list, this formula:

```
<<__z_Amt_Fee>>
```

shows the sum of the fee fields for all the sub-item involved contact record

Mail Merge From Programs List

If you do a mail merge from the list of programs, fields from program records and contact records (booking contact), can be used in the document. In addition, totals of fields in workshop records can be used.

The LI syntax (see *List Item Formulas* on page 506) allows only fields from workshop records.

When you choose Mail Merge from the programs list, you are asked about special merge conditions:

- You have the option of merging all workshops under all the selected programs so that they are all part of a single program. Use this feature when you want to aggregate together several programs' workshops, perhaps to produce a statement, contract, or invoice.
- You are asked which contact should be considered the primary contact for the purposes of the mail merge. This is the contact whose record will be used if you have contact fields (e.g. name, address) in the mail merge template. You are given the option of the booking contact or either of the two billing contacts in the program records. You also have the option of choosing the venue contact, in which case Sumac chooses the venue of the first workshop within a program.

Mail Merge From Involved Contacts List

If you do a mail merge from the list of involved contacts, you can use fields from contact, program, workshop, and personnel records. You can also use the totals of fields from personnel records.

When you do a mail merge from the list of involved contacts, Sumac produces one document for each contact, grouping all the involved contact records for that contact together into a single merge document.

Account Codes in Sumac

Account codes lookup list: a list whose entries can be chosen from a drop-down menu. For information about defining *Accounts*, see page 593.

Sumac Record	*Mandatory?*	*Usage*
campaign		When entering a donation, choosing a campaign with an account fills the Account field in the donation.
discount		When a surcharge is part of a transaction being used to create ledger entries, the account for the discount is credited.
donation type		When entering a donation, choosing a donation type with an account fills the Account field in the donation.
donation	can be made mandatory by using Preferences	See *How Transactions Are Added to the Ledger* on page 247
event		When entering a donation, choosing an event with an account fills the Account field in the donation.
event package		When a user buys a subscription, the account code of the event package they subscribe to is credited.
fund		When entering a donation, choosing a fund with an account fills the Account field in the donation.
funder request		See *How Transactions Are Added to the Ledger* on page 247
invoice		See *How Transactions Are Added to the Ledger* on page 247
ledger entry	normally either the debit or credit account is specified	Accounts enable Sumac to produce G/L-style reports.
lot	can be made mandatory by using Preferences	Pending requests from our customers, lots are not yet automatically added to the ledger.
membership		See *How Transactions Are Added to the Ledger* on page 247
payment	can be made mandatory by using Preferences	See *How Transactions Are Added to the Ledger* on page 247
payment type		Transactions that involve payments are put in the ledger by debiting the account for the payment type.

Sumac Record	*Mandatory?*	*Usage*
pledge		See *How Transactions Are Added to the Ledger* on page 247
product		See *How Transactions Are Added to the Ledger* on page 247. When a product is sold, the product's account is credited.
registration	can be made mandatory by using Preferences	See *How Transactions Are Added to the Ledger* on page 247
sale	can be made mandatory by using Preferences	See *How Transactions Are Added to the Ledger* on page 247
session supplementary items		When a supplementary item (typically a product) is sold as part of a registration, the account for the supplementary item is credited.
surcharge (tax)		When a surcharge is part of a transaction being used to create ledger entries, the account for the surcharge is credited.
ticket order	can be made mandatory by using Preferences	See *How Transactions Are Added to the Ledger* on page 247

Barcodes in Sumac

Barcodes

Sumac works with Code 39 barcodes.

Compatible Barcode Scanner

We used the Motorola Symbol LS2208 for development and testing of barcodes in Sumac. However, any barcode scanner that emulates a keyboard and can scan Code 39 barcodes will also work. If you would like to scan barcodes on mobile phones or similar computer displays, then you need a slightly different barcode scanner; the Motorola LI2208 can handle this additional requirement.

Template for Barcode Tickets

Before you can email tickets, you need to create a PDF template. This template is for a ticket order, not just for a single ticket. It must be a PDF document: to make them more secure, Sumac always generates ticket barcodes in a PDF document. The template is used to generate an attachment to an email, and the attachment contains the barcoded tickets.

First Page

The template is used to create the *first page* of an attachment, which usually contains your logo and address, any rules that apply in your venue, and information about the tickets purchased, the order, and the purchaser.

Barcode Pages

When this template is used, Sumac automatically adds additional pages to the document it produces. The additional pages contain barcodes, one for each ticket.

If You Don't Want Barcodes

You can decide if Sumac should append a page of barcodes when it sends a confirmation email to patrons. Click Utilities/Preferences/Ticketing, and turn this checkbox on or off: *Attach ticket barcodes to ticketing confirmation email*.

Tell Sumac About The Barcode Template

Before emailing tickets with barcodes, click Utilities/Preferences/Ticketing. Fill in the following fields:

- Email ticketing confirmation: "from" email display name
- Email ticketing confirmation: "from" email address
- Email ticketing confirmation: email message template
- Email ticket barcodes: email attachment template.

Emailing Ticket Barcodes Using Sumac

In the Ticket Orders list window select a ticket order then click Mailing/Email Confirmation & Tickets. Sumac to send the confirmation email. If you have specified a barcode template, then the template is used to create an attachment to the email, and the attachment contains the ticket barcodes.

Emailing Ticket Barcodes Online

If you have told Sumac about the barcode template (see above) then the email confirmation for an online ticket order will have an attached PDF document that contains barcodes for the tickets.

Printing Tickets with Barcodes in Sumac

Before you can print tickets with barcodes, you must install a Code 39 barcode font on your computer. You can get this font from here:

http://www.fontpalace.com/font-download/CODE3OF9X1+Normal/

When creating the custom layout for the ticket, create a new layout element with:

- Type: *Field*
- Text: mail merge code *t_barcode*
- Font: *CODE3OF9X1*

When you print tickets using this custom layout, the barcodes should be printed where you positioned the field.

Using Barcode Scanner to Scan Tickets

Set Up and Test

Connect the barcode scanner to your computer and make sure it can scan Code 39 barcodes successfully to a text file.

Using

In Sumac, click Ticket Orders/Start Ticket Scanner. Select an event and the Barcode Scanner window along with another window containing the list of sold tickets for the specified event should pop up.

You can now begin scanning barcodes:

- If a ticket is scanned successfully, then *Success* is displayed in the scanner window along with the name of the contact who purchased the ticket. In the sold tickets window the ticket, gets marked as used and is highlighted.
- If a ticket scan fails, *Failure* is displayed in the scanner window along with the error message.

Using Multiple Barcode Scanners at an Event

Multiple barcode scanners can be used at a single event by connecting each scanner to a different computer running Sumac. Since all copies of Sumac will be connected to the same database, Sumac ensures that a ticket scanned by one scanner is not allowed by another scanner.

Email

Introduction

This chapter discusses how to use Sumac to send email.

> Hint: If you want to learn about using Sumac to receive email, see *Receiving Email* on page 424.

Sumac can send email in two different ways:

- Sumac can tell your computer's default email program to compose an email to a specific CONTACT. In this situation, Sumac does not actually send the email, but relies on you and your email program to send the email. However, Sumac *does* create a communication record to record the fact that you sent an email.
- Sumac can send bulk email to many CONTACTS at once, recording the COMMUNICATIONS as it goes.

The next section briefly explains the first way of sending email. Except for the next section, which briefly explains the first way of sending email, the rest of this chapter discusses sending bulk email.

Sending A Single Email

CONTACT records hold email addresses. Beside each email address, there is a link icon.

If you click the link icon, Sumac does two things:

- It runs your computer's default email program, and tells it to compose an email to the specified email address.
- It creates a COMMUNICATION record for the chosen CONTACT. The COMMUNICATION is given a type of "email" – your Sumac Administrator needs to use the Preferences command to tell Sumac which communication type to use.

Sending Bulk Email

Sumac allows you to send email to selected CONTACTS. Here are the steps.

- ✔ Prepare a document template – text file (file extension txt), JPEG (file extension jpg), or HTML file (file extension .htm or .html) – that will be used to generate the body of the emails. The preparation of document template files is discussed in *Create Document Templates* on page 499.

  > Hint: Ensure that the template produces the email that you want. Before sending it to anyone else, test it by sending it to only yourself.

- ✔ Identify the CONTACTS who are to receive the email. You can choose them, and initiate the email by clicking the Send Bulk Email button in many lists:
- ✔ Choose the appropriate list, and use its search and select tools to choose the CONTACTS to whom you wish to send the email.

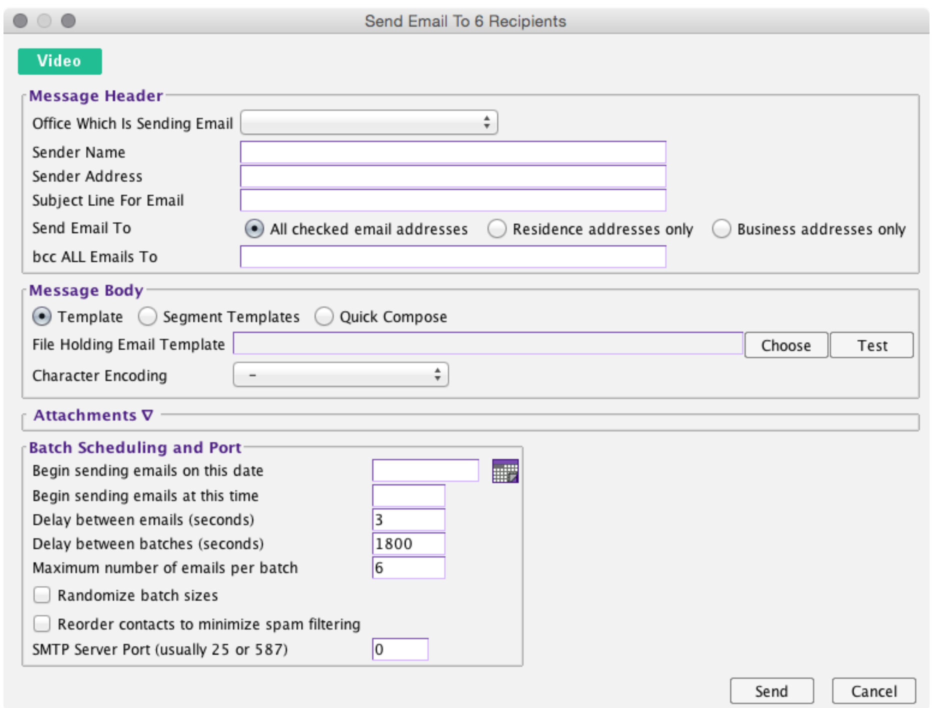
  > Hint: Each time you use a Send Bulk Email button, add yourself to the list of recipients. When you yourself receive the message that you sent, and the message is formatted correctly, you know that probably all other recipients received a good message.

  > Hint: Here are the steps that Sumac follows to choose the email address to be used:

- If the vacation address is in effect (i.e. today's date is between the Effectivity Start and Effectivity End dates), then Sumac sends to the vacation email address. If the vacation email address has not been specified for the CONTACT, then proceed to the next step.
- Sumac then sends to all email addresses in the Residence and Business tabs that have their *Send to this email address* check box set.
- If none of the above steps identify an email address to be used, then the email status report tells you that no email was sent for that reason.

✔ Click the Send Bulk Email button. At this point you may receive additional prompts to enable you to choose whether you want to send emails to all CONTACTS, selected CONTACTS, or to CONTACTS whose IDs are in a file. If you choose the last option, then you will be prompted for the file – a tab-delimited text file with the IDs in the first column.

✔ Then this email dialog appears.



✔ Specify office:
- Choose from the drop-down menu the office sending the email. If you have only one office, there will be no drop-down menu for choosing it.
- The SMTP Server Port Number (filled in at the bottom of the window) defaults to 25 – the number used by most Internet service providers (ISPs). If you have trouble connecting using 25, try 587 – the common alternate used by some ISPs. If you are regularly overriding the port number, then get your Sumac Administrator to specify the one you need in the default office record.

✔ Specify Message Header fields:
- Sumac specifies the Sender for the emails. It is taken from the chosen office. You can also type in a different email address.

- Type the subject in the Subject Line For Email. This text appears as the subject line in each email that is sent.
- You may want to send the email to all email addresses in the contact records which have been marked *Send to this email*. But if you want to send to only residence or only business email addresses, click the appropriate radio button.
- You can specify a blind copy (bcc) email address. Sumac sends this bcc email address a copy of every email that it sends.

✔ Specify Message Body fields:
- If the message body is to come from a template, click Choose File to select the template file. Sumac tries to determine a Character Encoding from the chosen template file. In most cases, you do not need to specify the character encoding; platform defaults are used. However, if Sumac is choosing the wrong encoding, or you need to force a particular encoding, then you can use this drop-down menu to specify that your template uses a particular encoding.
- If the recipients of the email are in different segments of the database, then you have the option of choosing a different template for each segment. When you click the *Segment Templates* radio button, a window appears and you can click to choose the templates you wish to use.
- Alternatively, click the Quick Compose button and enter a message to be sent as the body of the email.
- If you choose a template that constitutes the body of the email, then click the Test button, the button performs a mail merge operation on the template using the data for the first person in the list of recipients, and opens the resulting mail merge file to show you the result. Note that this button does *not* send an email: it just lets you view what an email might look like.

✔ Specify Attachments:
- If you want to send attachment files to each email, click the Add button once for each attachment file. To remove an attachment added by mistake, click to select the attachment file, then click the Remove button.
- If you chose an attachment in error, click the corresponding Clear button.

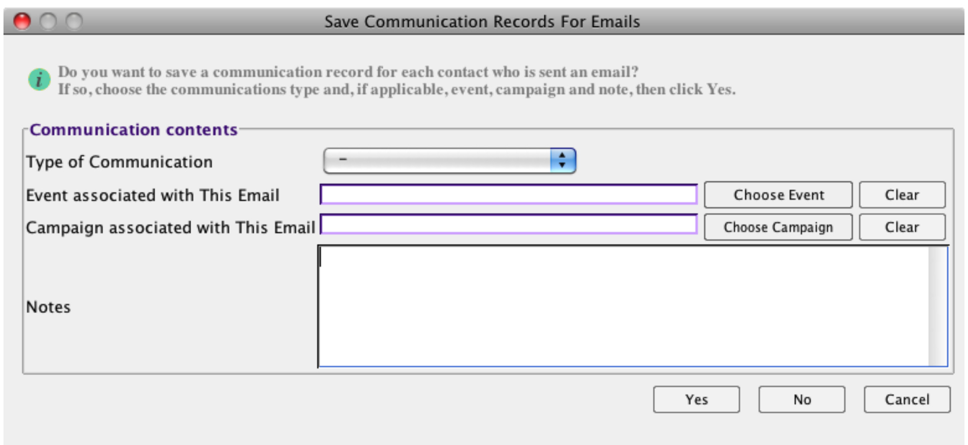
✔ If you do not want Sumac to start sending emails immediately, you can click to specify a time and date when you want the sending to start. Note that if you do not specify a date, then Sumac starts sending the next time the specified time of day arises.

✔ Define transmission batch size and timing. This lets you specify how many emails go in a batch, and delays between batches to help you conform to your ISP's guidelines. You should contact your ISP for guidelines on sending emails to large numbers of CONTACTS.
- The Delay between emails should be set to a few seconds. If it is too small, some ISPs are unable to keep up with constant email traffic and lose emails being sent (sometimes without telling you this happened). In addition, if you set the delay to a larger number – perhaps 30 seconds – then you reduce the risk of being seen as a spammer. Consider using a longer delay and doing your large email transmissions overnight.
- In addition to a delay between individual emails, it is useful to have a longer delay between batches or groups of emails. Specify how long the delay between batches should be. Some ISPs do not treat you as a spammer if you enter a delay of 60 minutes (3600 seconds) or more between batches.

- The number of emails per batch should be specified. This number will vary depending on the ISP's requirements. A typical number might be 50 to 100.
- If you want batch sizes to be slightly adjusted from the maximum number of emails per batch, click *Randomize batch sizes*. With this option turned on, Sumac will randomly reduce each batch by up to 7 emails, making the pattern of mailing less susceptible to spam checking.
- *Reorder contacts to minimize spam filtering*: This feature re-orders the emails being sent so that emails to one particular domain are separated as much as possible. For example, if you have many emails in the gmail.com domain you send to several gmail.com email addresses one right after the other, gmail.com may treat you as a spammer. This new feature arranges email addresses so that those being sent to each domain (e.g. gmail.com) will be separated by emails being sent to other domains. Please note: We do *not* condone spam, and do not want you to send spam. But if you are being unjustly classified as spam for this reason, then this new feature of Sumac will help you avoid this problem.

✔ Click Send.

✔ Now the following dialog appears, to enable you to specify whether you want to save a communication record for each email that is sent and, if so, the content of these communications.



- If you want to save a communication for each email that is sent, choose the communication type, event, and campaign, then click Yes. Besides the field values that you specify, the communication records that are created for each contact have a note which includes the name of the template file that was used to generate the email. You can change the content of the Notes field.
- If you do *not* want to save a communication for each email that is sent, click No.

✔ A file dialog asks you where to put the email status report. This report confirms which emails were sent successfully, and gives a reason for the ones that were unsuccessful. Once you specify where to put this report file, the emails are generated from the template and then sent.

Email In Progress

During the transmission of a set of emails, a progress window appears in the bottom right corner of your computer screen:

- ✔ It indicates progress in sending the emails. The Status field in this progress dialog shows one of these status messages:
  - Sumac is sending an email for a particular named CONTACT
  - Sumac is waiting for the delay after sending a single email
  - Sumac is waiting for the delay after sending a batch of emails
  - Sumac has finished all emails and has put a status report on disk for you.
- ✔ You can use Sumac for other operations while emails are being transmitted. If you close this window, Sumac finishes any email that is being transmitted at the moment, then further email transmissions are terminated immediately.
- ✔ When Sumac is finished sending all emails, it makes a distinctive sound to draw your attention to the completed operation.
- ✔ You should always check the email status report after sending emails to see if any were not sent successfully.

Repeated Email Addresses

Even if two CONTACTS with the same email address are chosen to receive email, only one email will be sent to each email address. The status report indicates when an email was *not* sent to a contact because the contact has the same email address as another contact.

There is one exception to this situation, where Sumac *does* send multiple emails to the same email address. If the bulk email action is sending attachments that are different for each email, Sumac allows multiple emails to be sent to a single recipient.

Pictures in Emails

Introduction

When you send an email to many CONTACTS, you must create a document template file. The document template defines the content of each email. As it prepares emails to send, Sumac analyzes the template and puts real data in the place of formulas.

A document template for email can be in one of three formats:

- ◆ text only – straight text without formatting
- ◆ HTML (hypertext markup language) – the language of the world wide web
- ◆ JPEG – a picture.

A text only email is useful for conveying basic information. An HTML email can contain formatting information that enables you to significantly enhance the appearance of the email, with font changes, table layouts, and colour.

HTML also allows you to insert pictures into your document template. Pictures included in HTML documents are usually JPEG (jpg) or GIF files.

But there are problems with pictures in emails:

- ◆ they slow down the downloading of the email
- ◆ many spam and other filters automatically reject emails with pictures in the body of the message
- ◆ some users automatically delete emails that contain embedded pictures.

Insert A Link

The solution to this is to *not* embed the picture itself in the email document template. Instead, put the picture in a special folder on your web server, and within the email document template include a link to the picture.

Here are the steps to accomplish this:

- ✔ Put the picture in a directory on your web server. This directory needs to be accessible to the public, so it should not be placed in a restricted access area of your server.
- ✔ Make note of the path (URL) for the picture. It will look something like this:
  `http://MyCharity.org/pictures/emailPicture.jpg.`
- ✔ Test to ensure that the URL for the picture is correct. Run your web browser, and type or paste the URL into its address field, and see if the browser can display the graphic. If the browser cannot show the picture, then the URL is wrong or the directory holding the picture is not public.
- ✔ Run your HTML editor and open the document template file that you are creating. Insert into the template a link to the picture. If you are running Mozilla's HTML editor, you can do this by putting your cursor where you want the picture, right clicking and choosing Insert/Image, then typing or pasting the URL as the location of the image being inserted.

Test The Email

Test to make sure that the merge works properly. This is best done in three steps:

First, test the template by using the Mail Merge button in the CONTACTS list. Click to choose a single CONTACT, then click the Mail Merge button, and choose the document template being tested. Save the merged document on your desktop. Open the generated document and examine it with a variety of programs: perhaps Internet Explorer, Mozilla Firefox, and a word processor. By examining it in divers programs, you see whether the HTML template is generating appropriate output, and whether the picture shows up correctly.

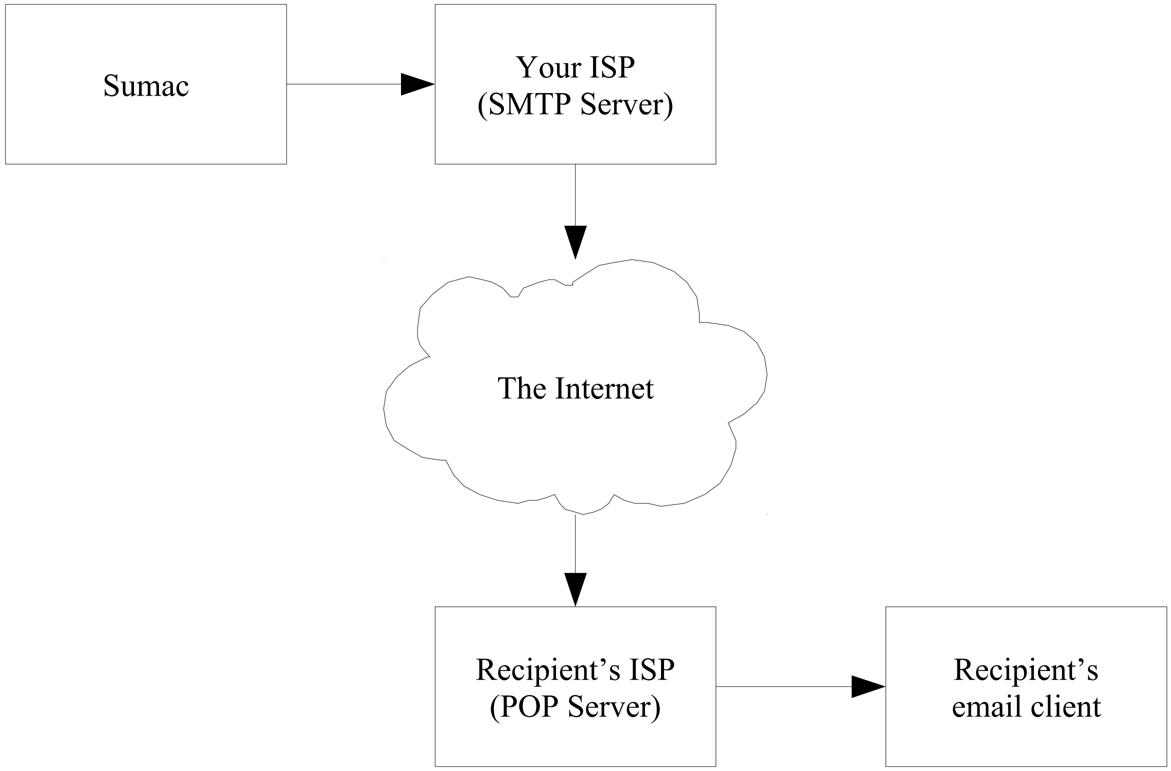
Second, test the template by using it to send an email to a single CONTACT – most easily, yourself. Check that the email looks correct in your email client, and that you can view the included picture(s). If possible, send the email to some different email clients (e.g. Outlook, Mozilla Thunderbird) to make sure that formatting and the included picture work correctly.

Finally, when you do your real runs, sending the email to many CONTACTS, make sure that you or one of your colleagues is included in the distribution list. This ensures that you can check the email as it was finally distributed to your CONTACTS.

Troubleshooting Email

Introduction: How Email Gets Sent

This picture shows how email gets sent.



Sumac, just like your personal email client when it is sending a message, passes messages to your ISP's's[4] SMTP[5] server. The SMTP server directs the messages through the Internet to the recipient's email server (probably a POP[6] server). The recipient's email client (e.g. Mozilla Thunderbird, or Microsoft Outlook) gets the messages from the email server and then displays them to the recipient.

Problem: We cannot send email and Sumac reports an EOF error on each one

An EOF error often means there is something wrong with the sender email address.

Some servers are unhappy when you specify a sender email address that the server cannot verify. In this case, make sure that you specify an email address that is handled by the same SMTP server and account that is actually logging in (to the SMTP server) and the email.

Some SMTP servers check for the validity of a sender email address in a case sensitive way. For example, if your email address is *MyName@domain.org*, then the server will object if you specify the sender email address as *myname@domain.org*.

Problem: Pictures do not appear in the emails we send

Situation

You have followed the process described in *Pictures in Emails* on page 404, to cause Sumac to generate and send email messages which contain links to pictures.

[4] ISP: Internet Service Provider
[5] SMTP: Simple Mail Transfer Protocol
[6] POP: Post Office Protocol

Your CONTACTS are receiving the email, but there are no pictures showing in it.

Explanation

If every CONTACT receiving the email is unable to see the pictures, this means that for some reason the link in the email message is not retrieving the picture from your server. When this is the case, check the following:

- Make sure the picture file is actually on your web server in the folder where you expect it.
- Make sure the link in the email is correct, pointing to the correct file and folder on your web server. Carefully check file name extensions.
- Make sure that the security settings for the folder on the web server allow all users to read (i.e. get the picture from) the folder.

If most people can see the picture but only one or two people are unable to see it, then the problem probably lies in security settings, most likely on their own computer, but possibly in an email or other security server that is applying security to their whole office. Try these things:

- Have the recipient check the security settings in his email client program. Often security settings contain an option to not show pictures. If this is the case, then have the recipient turn off this option. If the email client program has an option to only show pictures on request, then there may be a Show Pictures button or command the the recipient has to choose to see the pictures.
- The recipient may be using an email client program that cannot receive HTML emails. If he can only receive text file emails, then pictures will not appear.
- Have the recipient speak to his system administrator to find out if there is a security system that prevents pictures from getting through in emails.
- If some people see HTML codes in the email, instead of the proper picture and text, then probably the version of HTML in the email is not being understood by the email client. This notoriously happens when you attempt to create HTML with Microsoft Word. Try using another program to create the HTML template documents, and do not open and then save them from Microsoft Word.

Problem: We send email but the recipients do not receive it

Situation

You have sent out 100 emails. Sumac's email status report indicates that they were all sent correctly. Your ISP has not rejected any of them. But for some reason, some people did not get the messages.

Explanation

When Sumac reports that an email has been sent, it is telling you that it has given the message to the SMTP server at your ISP, and that that ISP server has accepted the message for delivery. This is just the first arrow in the picture above. There are still several things that can go wrong to prevent a message from being delivered to its final destination:

- The recipient's ISP or email client thought the message was spam. See *Avoiding Spam Detectors* on page 408.

- The recipient missed the message. Lots of people receive large volumes of email. Someone may have actually received your email, but thought he did not receive it. Try sending it again to see if that is the problem.
- Email is not 100% reliable. Although email is a very reliable medium, it is not perfect. A single email message is typically handled by dozens of computers before it reaches its destination. Sometimes there are glitches that cause an email to take days or even a week to be sent. Sometimes an email message is being forwarded by a server which crashes irretrievably, losing the email messages it was transporting.

Avoiding Spam Detectors

Spam is unsolicited email. Most recipients dislike spam. In some places it is illegal to send spam. Consequently ISPs, which provide the infra-structure for sending and receiving email, and email client programs running on recipients' computers all provide features for automatically detecting and deleting spam.

Don't Send Spam

If you are sending spam, stop. You should only be sending email to recipients who have asked to receive it.

You should only be sending the type of email that the recipients might reasonably have asked for. Don't send email about special events to people who asked to see only your quarterly reports, and vice versa.

Talk To Your ISP

It is very important to let your ISP know what you are doing. If you don't, and the ISP decides, based on your email traffic, that you are a spammer, the ISP may instantly, without notice to you, shut down your access to the Internet until you justify why it should be reconnected. This may easily take a week or two, a serious problem especially if it occurs just before a big event.

Tell your ISP about the email that you send. Perhaps you send relatively little email, but in the month leading up to a big event, you expect to send 500 emails per day. Explain this to your ISP. Ask the ISP how you should organize batches (size, timing) and the delay between sending individual emails so that your ISP will not treat your messages as spam, bouncing them back to you or preventing them from being transmitted.

If the volume of email you send exceeds the ISP's normal limits, make special arrangements. Perhaps this will need a special account on a different SMTP server managed by the ISP.

Don't Send Things That Look Like Spam

Even if your own ISP is satisfied, you need to satisfy the ISPs of all your recipients. Some charities sending a lot of email have found that one ISP, used by many of their recipients, was blocking the email. Sumac helps with this by including a text version of the body of your email along with an HTML version. Of course, you don't have a relationship with all ISPs around the world, so you cannot do this directly.

Similarly, most email clients now have spam detection features. You need to make sure that the email you send to your contacts does not get caught by these spam detectors either.

Spam detectors work by gradually accumulating information about mail being sent, and then making statistical judgements that a message is probably spam. If you send out one or two identical emails, they won't be seen as spam. Send 100, and maybe they will. Send 100,000 and for sure they will.

Here are some suggestions that help:

- Don't send exactly the same message to every contact. Customize each message, perhaps by putting "Dear <<c_Virtual_Letter_Salutation>>" at the start of each one. Spam often consists of an identical message being transmitted to millions of recipients, so spam detectors used by ISPs look for duplicate messages and classify them as spam. For more information about customizing email messages, see *Create Document Templates* on page 499.
- Don't send messages that contain words often used in spam messages. Spam often relates to enhancement of sexual prowess, stock promotions, drugs, contests already won, gambling, and pornography. If your email contains the phrase "You could win $1000", you run the risk of being seen as spam. Check the language of your message to make sure that it does not contain segments that read like a common sort of spam message.
- Don't send messages that consist of only a picture. Professional spammers often do this in order to avoid spam detectors that just examine the words in a message. If your email consists of just a picture, most sophisticated spam detectors consider it to be spam.

The Solution May Be At The Recipient's End

The recipient may not be receiving your emails because his own email client or email server is blocking the message. Depending on where the problem is, the recipient may be able to fix the problem.

The recipient can usually tell the spam filter – whether at their ISP or on their own computer – to not block things from certain senders. If the recipient tells the spam filter to not block email from your organization, then the problem is solved, at least for that recipient.

Make Sure It Is Easy For Recipient's To Opt Out

ISPs are under pressure to reduce spam. A single complaint by one of your recipient's to your ISP may cause the ISP to take drastic action, and shut down your email service.

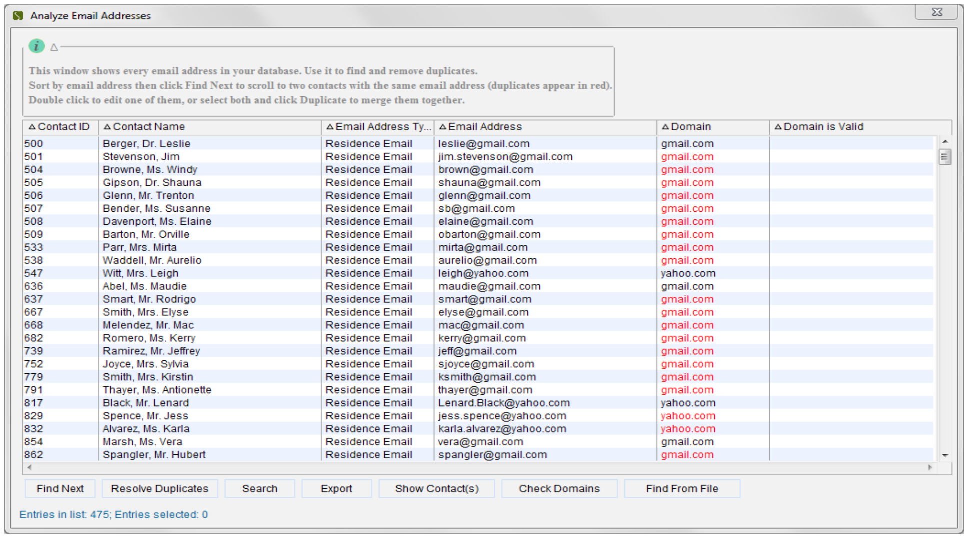
Make sure it is very easy for a recipient to get off your mailing list. It is imperative that every message you send *must* have a line in it saying something like:

> *If you do not want to receive email from us in future, please do the following: ...*

Many organizations bury this opt-out message in the fine print at the end of the emails they send, but it is usually wise to make it much more obvious: make it larger, perhaps a different colour, and move it to the very start of the email. Some ISPs are so sensitive that a single complaint can shut you down, so you must do everything in your power to prevent the complaints. This is another reason why it is good to talk with your ISP in advance, and explain what you are doing.

Analyzing Email Addresses

In the Contacts list, click Analyze & Report/Analyze Email. When you choose this command, this window appears:



Window Content

The window is instantly filled with all residence, business, vacation, and assistants' email addresses in the entire database. They appear in the Email Address column. Each email address shows the CONTACT it is associated with, what type of email address it is (e.g. Business Email, Residence Email 2). Sumac also extracts the domain name (the part after the @) and puts it in a separate column.

Duplicate Email Addresses (Find Next Button, Duplicate Button)

If you sort by the Email Address column, duplicate email addresses show in red.

Click the Find Next button to move from one duplicate to the next.

If two records are selected, identifying two contact records that are duplicates identifying the same contact, then click the Duplicate button to merge the two contact records together. This works the same as the Duplicates button described on page 96.

Finding Records (Search Button)

You can click any column titles to sort, and type on the keyboard to search in that column and scroll to the desired record.

The Search button searches in the Email Address column and groups all the matching email addresses at the top of the list.

Export Button

The export button sends the contents of the window to a tab-delimited text file that can then be opened with any other program for further analysis.

Show Contact(s) Button

If you select one or more lines in the list then click this button, Sumac shows a single CONTACT record (if one is selected) or presents the CONTACTS list with all the selected CONTACTS showing.

Check Domains Button

Click this column to have Sumac determine if there is an email server associated with each domain name. Note that it takes a second or two to check each domain.

As Sumac checks domains, it puts *yes* or *no* in the Domain is Valid column. If a domain is found to be invalid, i.e. there is no email server for it, you should stop sending email to that address.

Edit Contact

If you double click any record, you can edit the corresponding CONTACT.

Find From File

Use this button if you would like Sumac to show only a specific list of emails in the window, do the following:

1. Create a .txt file that contains the list of addresses you would like to see in the Analyze email window. Save the file.
2. Open Analyze Email and click Find From File. Select the file you just created.
3. Check your new list of domains as you would normally.

Emailing Documents

Mail merge operations in Sumac can be used to create a personalized document for many contacts. You may choose to print these documents and print envelopes or labels, then send them through the postal system.

Alternatively, you can tell Sumac to email the documents. This works much like any other bulk email operations, except that you specify a folder full of documents that you want sent. Sumac determines the recipients of the email by looking at the names of the files.

Here is what to do:

✔ Use a Mail Merge command in any list window to generate the documents you want to send. When asked, save one file for each contact (i.e. do not put all merge results into a single file), putting them into a folder.

✔ You will note that Sumac names each file, inserting “C-” followed by a contact’s ID. This contact ID identifies the intended recipient of the document, and enables Sumac to figure out which contact record and email addresses relate to each generated document.

✔ Click Email/Email Documents in the contacts list window.

✔ The Email Documents window appears and you can click:

- Filter & Select to select contacts who do not have a particular communication preference
- Send Emails to send emails with the files attached to them.

Tracking Links in Emails

If you send an email newsletter, you may want to track who clicks which links in the newsletter. Sumac can do this for you. For details, see *Email Click Tracking* on page 583.

Address Validation Integration

Introduction

Sumac integrates with an address checking service called Quadient Data Services (formerly Satori). Quadient allows you to validate individual addresses in your database before sending out a mailing to a contact. This service works well for non-profits that do a lot of shipping.

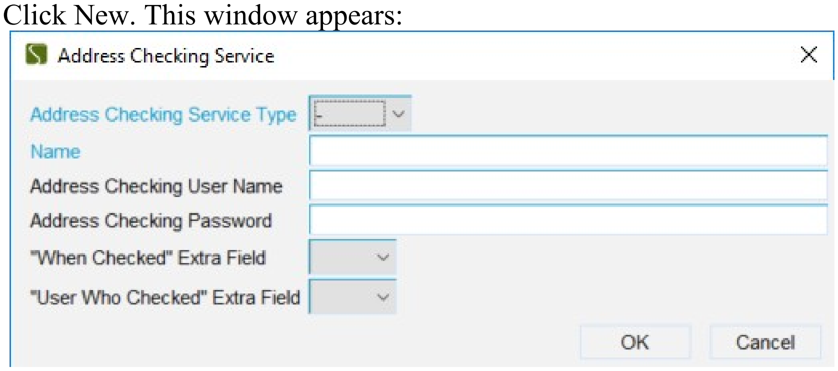
Fees

Quadient is a separate service with a unique fee structure for their services. You must contact Quadient directly to request an account for integration with Sumac. When you have an account with Quadient, you are able to use it with Sumac to validate one address at a time. Note that you are not able to validate addresses in bulk.

How to Set up Address Verification in Sumac

To set up integration between Quadient and Sumac, do the following:

1. Open the lookup list: Utilities/Customize Database/Lookup Lists, Select Area: Contacts, and Lookup List: Address Checking Services.
2. Click New. This window appears:



3. Set the following:
    1. Address Checking Service Type: Quadient
    2. Name: Choose a name that makes sense for your organization. This is simply the name that Sumac uses to display this service in the lookup list.
    3. Address Checking User Name and Address Checking Password: Enter your Quadient provided credentials
    4. “When Checked” Extra Field: In order to have options in this list, you must first create an extra field for the data type: Date. Do this in Utilities/Customize Database/Lookup Lists, Area: Contacts, Lookup Lists: Extra Fields. Then, select the extra field you created in this drop down. This is the field that Sumac uses to show you when this address was last checked.
    5. “User Who Checked” Extra Field: In order to have options in this list, you must first create an extra field for the data type: Text. Do this in Utilities/Customize Database/Lookup Lists, Area: Contacts, Lookup Lists: Extra Fields. Then, select the extra field you created from the drop down beside User Who Checked.

Validate Addresses

Once you have set up the integration between Sumac and Quadient, you are able to check individual addresses. To do so, open the Contact Record of the person you are looking to validate, and navigate to the address tab. For example, if you are looking to validate the business address for John Smith, then open his Contact Record, and click the business address tab.

A Check Address button appears on each of the three possible address tabs once you have set up integration. Click the button in order for Sumac to send the information to Quadient for verification. If you have the extra fields "When Checked" and "User Who Checked" activated, then Sumac fills them with the appropriate information at this time.

Troubleshooting

If you encounter an error with the validation, Sumac shows you an error window containing an error code. Check the error code against Quadient's list here: Page 860: http://docs.satorisoftware.com/us/sa/docs/Satori_Architect_Developer_Guide_US.pdf

Accounting Integration

Introduction

Sumac can generate ledger entries for all financially-related types of data. These ledger entries can be transferred to accounting packages. Often the generic export capabilities of Sumac enable you to produce a file that can be imported into your accounting software. However, special features of Sumac make it particularly easy to integrate with these accounting systems.
can integrate with:

- Intacct (see page 414)
- QuickBooks Online (see page 414)
- QuickBooks Desktop (see page 414)
- Sage 50 (Simply Accounting) (see page 419)

Notes for the Sumac Administrator

Before data can be transferred directly from the Sumac database to your accounting database, you need to specify how Sumac should connect to the accounting system: see *Accounting API* page 594.

Intacct

Feature Overview

Sumac can export data to Intacct. It can export:

- balanced Ledger Entries

Sending Names

Sumac sends contacts to Intacct as Intacct *customers*. Customers sent from Sumac to Intacct are identified by their Sumac contact ID numbers; their names are not sent to Intacct.

QuickBooks

Introduction

Sumac can export data to files in several formats that can be imported into other accounting systems, including QuickBooks. However, if you use QuickBooks, Sumac can transfer data directly into your QuickBooks accounting system.

Sumac can export to QuickBooks Online or QuickBooks Desktop 2011 and later.

Feature Overview

Sumac can export data to QuickBooks Online and QuickBooks Desktop (Windows only). It can export:

- balanced Ledger Entries
- Payments
- Invoices
- Contact addresses

When exporting, all associated contacts are automatically exported to QuickBooks.

Match Account Names

Amounts being sent from Sumac to QuickBooks are identified by accounts. If the account code in Sumac matches the account name in QuickBooks, then Sumac can export these records into their appropriate accounts in QuickBooks. For example if a payment record has an account with the account code Chequing specified in Sumac and there is also an account named *Chequing* in QuickBooks, then when you export this payment Sumac can export the payment to the account named *Chequing* in QuickBooks.

QuickBooks Connections

QuickBooks Online Connection Maintained

When Sumac starts up, it checks for a connection to QuickBooks Online, and resumes using it if it is still alive.

QuickBooks Online Warning Message

To conform with QuickBooks Online security standards, the connection between Sumac and the Sumac database should be encrypted. If a user is allowed to see invoices, ledger entries, or payments, and is logging into a multi-user database that interfaces with QuickBooks Online, and the connection to the database is not encrypted, then a warning message tells the user that in a future version he will not be able to connect without encryption.

Transferring Data To QuickBooks

Back Up First

If you use QuickBooks Desktop, then before doing particularly large exports from Sumac, back up your QuickBooks company file.

Export

If the connection to your accounting system has been configured, then when you click the Export to Accounting button. Export to Accounting is available in the Payments list and the Ledger Entries list. If the connection has not been configured, see *Accounting API* page 594.

If you are exporting to QuickBooks Online, then when the transfer starts, QuickBooks requires you to use an additional one-time use *security token* which it provides through a browser page. Sumac re-directs your browser to a page that requires you to log in to your QuickBooks Online account, and authorize Sumac to send data to QuickBooks. Then a page will show you a PIN code which you must copy from your browser and paste into Sumac. The security token continues to work until you quit Sumac.

> Hint: Groups of ledger entries being transferred to QuickBooks must be balanced. In the Ledger Entries list window, use the Analyze & Report/Account Summary report to ensure that transactions are balanced.

Contact Names

When exporting data to QuickBooks Sumac often needs to connect it to a contact. Sumac first checks if the associated contact is already in the QuickBooks database and, if not, exports it.

If a contact's full name is *John Doe* and his contact ID in Sumac is *123*, then in QuickBooks, this contact's display name will be *123-Doe, John*.

Hint: You can change the name sent to QuickBooks using an option in the Accounting API record. See *Accounting API* page 594.

QuickBooks Customer Field	*Sumac Fields*
Customer Display Name	contact id-last name, first name or last name, first name

Vendors

Ledger entries being exported to an Accounts Payable account require a vendor to be specified. Sumac's QuickBooks integration links transactions to vendors as well as to customers.

Sales Tax

Surcharges in Sumac will correspond(names must match) to Tax Rates in QuickBooks. However Tax Rates cannot be applied to transactions directly in QuickBooks. They must be applied through Sales Tax Codes which consist of one or more Tax Rates. So when exporting a transaction with Surcharges to QuickBooks, Sumac checks to make sure there is a Sales Tax Code in QuickBooks that only consists of the Tax Rates that match up with the Surcharges.

For example if an invoice in Sumac has the Surcharges *GST* and *PST* applied to it, in order to export this invoice, the Tax Rates *GST* and *PST* must exist in QuickBooks. Also there must be a Sales Tax Code in QuickBooks, which consists of only the Tax Rates *GST* and *PST*. The name of the Sales Tax Code itself does not affect the transfer.

General Usage: QuickBooks Online

Here are the steps to follow to send data from Sumac to QuickBooks:

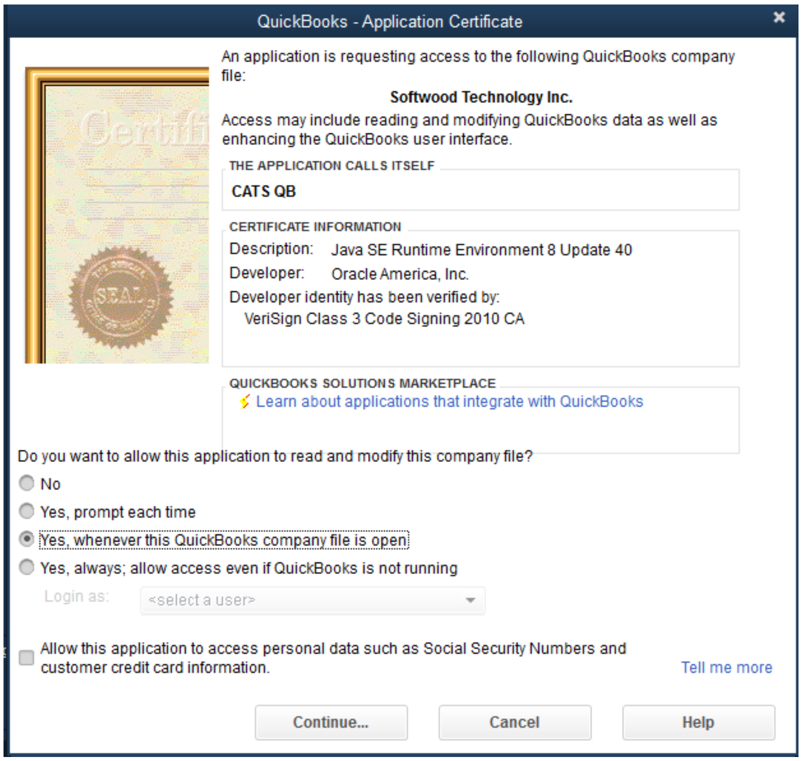
- ✔ Select the entries you would like to export
- ✔ Choose the Export To Accounting command
- ✔ If you have defined several Accounting API records, you are next asked to choose which one you want to export to.
- ✔ If this is the first time exporting to QuickBooks after opening up Sumac, you are redirected to a browser window in which you must log on to your QuickBooks account. You are then asked to authorize the Sumac application to connect to your QuickBooks account. After that you will need to retrieve the pin code that is displayed on the final screen and paste it into a window in Sumac.
- ✔ The selected records are then exported and Sumac tells you if it succeeded or failed.
- ✔ If the export succeeded, then the QuickBooks IDs of the newly created records are stored in the External ID field of the records in Sumac. Note that this does not happen for Contact records.

General Usage: QuickBooks Desktop

Here are the steps to follow to send data from Sumac to QuickBooks:

- ✔ Open up your QuickBooks Desktop to the company file you would like to export too
- ✔ Select the entries you would like to export
- ✔ Choose the Export To Accounting command

- ✔ If you have defined several Accounting API records, you are next asked to choose which one you want to export to.
- ✔ If this is the first time exporting to QuickBooks, a window should popup in QuickBooks asking you to allow the connection. Specify "Yes, whenever the QuickBooks company file is open" and click continue.



- ✔ The selected records are then exported and Sumac tells you if it succeeded or failed.
- ✔ If the export succeeded, then the QuickBooks IDs of the newly created records are stored in the External ID field of the records in Sumac. Note that this does not happen for Contact records.

Export Journal Entries/Ledger Entries

Ledger entries must have either a debit or credit account code specified along with the other mandatory fields in order to be successfully exported. The ledger entries are exported grouped together based on the Sumac records that they are linked to, and each group is exported over as a single Journal Entry into QuickBooks. The only exception are ledger entries linked to payments which is assigned to a group based on the Sumac record that the payment itself links to.

The total credit and debit amount of the ledger entries within a group must be the same for it to export into QuickBooks as a journal entry. To see if all the ledger entries balance out, you can check by running an Account Summary found in the Analyze & Report dropdown.

QuickBooks Journal Entry Field	*Sumac Fields*
Line Customer/Employee/Vendors	Contact
Line Description	Notes
Line Amount	Amount
Line Account	Debit Account/Credit Account
Line Class	Classes are specified within Accounts. See the “Accounts and QuickBooks Classes” sections for more details.
Line Debits/Credits	Amount
Date	Date of the most recent payment ledger entry and if one doesn’t exist the date of the most recent ledger entry
Memo	The notes in the transaction record linked to the ledger entries.
Journal no.	The ID of the linked transaction record

Export Invoices and Payments

Sumac can export Invoices along with their payments and link them in QuickBooks. When exporting invoices, Sumac asks if the user would like to export and link the associated payments.

QuickBooks Invoice Field	*Sumac Fields*
Invoice Date	When Created
Customer	Billing Contact
Line Amount	Fee Amount
Line Product/Service	Fee 1, Fee 2 … or whatever you customized the Fees to be called in preferences
Line Description	Line Description
Line Sales Tax	Surcharge Type 1 & 2. There must exist a Sales Tax Code in QuickBooks which consists of Tax Rates that correspond(names must match) to the Surcharges.
Line Class	Fee Account. Classes are specified in Accounts. See the “Accounts and QuickBooks Classes” chapter for more details.
Discount Item named “Discount”	Discount Amount
Statement Memo	Notes

QuickBooks Payment Field	*Sumac Fields*
Customer	Contact
Payment Date	When

QuickBooks Payment Field	*Sumac Fields*
Payment Method	Payment Type
Reference no.	ID of the Payment
Deposit to (must be an account of type Bank or Current Asset)	Account
Amount Received	Total
Memo	Notes
Accounts Receivable	No corresponding field in Sumac. The payment is sent to the default Accounts Receivable account.

Sage 50 (Simply Accounting)

Export of ledger entries from Sumac to Sage 50 (Simply Accounting) is done with an export operation that produces a file formatted for importing into Sage 50. To perform this export:

1. Open the Ledge Entries window.
2. Search for the list of ledger entries you would like to export.
3. Click Analyze & Report>Simply (Sage 50) Accounting.
4. Save the exported file.

Now that you have performed the export from Sumac, you must import the file in to your accounting system. To do this:

1. Open Simply Accounting.
2. Select File>Import>Import Transaction.
3. Select Format: Simply50 accounting
4. Locate the file you exported from Sumac.

Upon import, your accounting system brings in all of the Sumac ledger entries and ties them to the contacts in your system.

Fundful Integration

Fundful is a web application separate from the Sumac software. With the help of Fundful, non-profit organizations can host and track peer to peer (P2P) and team fundraising campaigns. These same organizations may wish to track other, non P2P fundraising efforts in a traditional database like Sumac. In the case than an organization is using both Fundful and Sumac systems, it is useful to bring all your information to one place for analysis and tracking. For that purpose, Sumac gives you the ability to integrate Fundful data into your Sumac database.

To integrate your Fundful data into your Sumac database, you must complete 2 steps:

1. Export your data from Fundful
2. Import the Fundful data folder to Sumac

This chapter describes all the steps, processes and details included in step 2.

How to Import my Data from Fundful

Once you have exported your data from Fundful, you have a zip file of that data saved onto your computer. You need to use this zip file to complete the following steps:

1. Open Sumac Console>Utilities>Import>Import from Fundful. A dialog opens.
2. Click Choose. Locate the zip file on your computer, and click Import.
3. Select the default values that you want Sumac to use for certain mandatory fields in Donations, Payment Records and Contact Records.
   NOTE: The fields that Sumac shows here vary depending on which fields are mandatory for those records in your database.
4. If your organization has Sumac set up to create Payment Records with each Donation Record, then set the “Create Payment Record” check box.
5. Click OK.

Sumac has now completed the import of your Fundful information. New contacts are made for donors and fundraisers. Campaigns are made for each team and fundraiser, and donations and payment records are made for each donation through Fundful.

Where does my Fundful Data Go?

Campaigns

A campaign record simply outlines an organization’s P2P campaign. A Fundful campaign corresponds to a top level campaign in Sumac. All Campaigns from Fundful go into a Campaigns Record in Sumac. Please see the table below to see how the fields are mapped from Fundful into Sumac.

Fundful Campaign Record Field Name	*Sumac Campaign Record Field Name*
Name	Description
Goal	Revenue Target
Start Date	Start Date
End Date	End Date
Description	Notes

There are some fields that Sumac requires the user to fill during the Campaign creation process that do not have corresponding fields in Fundful. For this instance, Fundful makes the following assumptions:

Sumac Field	*Assumed Value*
Type	Campaign

Fundraiser User Account

A user who would like to fundraise for your Organization's campaign must first create a fundraiser user account. This record consists of the fundraiser's personal information. Sumac takes values from the User Account and creates a Contact Record with them. See the table below for information on how Sumac maps Fundful values into the Contact Record.

Fundful Fundraiser Account Field Name	*Sumac Contact Record Field Name*
First Name	First Name
Last Name	Last Name
Email	Residence Email 1

Individual Fundraising Page

An individual fundraising page is created by a fundraiser user. This page can either fundraise directly under the organization's campaign, or under a team fundraising page for that campaign. Sumac takes the information from the Individual Fundraising page and inserts it into Contact Records and Campaign Records (parent and child). An individual fundraising page in Fundful corresponds to a child campaign in Sumac. Please see the Tables below for a description of the value mapping.

Fundful Individual Fundraising Page Field Name	*Sumac Record and Field Name*
Sumac Contact Record	
Fundraiser ID	ID
Sumac Campaign Record	
Campaign ID (if this individual fundraising page is directly raising funds for the organization's campaign)	Parent Campaign ID
Team Campaign ID (if this individual fundraising page is fundraising for a team)	Parent Campaign ID
Fundraiser First Name	Description
Fundraiser Last Name	Description
Goal	Revenue Target
Start Date	Start Date

Fundful Individual Fundraising Page Field Name	*Sumac Record and Field Name*
End Date	End Date
Story	Notes

Team Fundraising Page

A team fundraising page is created by a fundraiser user. This page fund raises under an organization campaign and can have individual fundraising pages also fundraising under it. A team fundraising page in Fundful corresponds to both a child campaign and a parent campaign in Sumac.

Fundful Individual Fundraising Page Field Name	*Sumac Record and Field Name*
Sumac Contact Record	
Fundraiser ID	ID
Sumac Campaign Record	
Campaign ID	Parent Campaign ID
Team Name	Description
Goal	Revenue Target
Start Date	Start Date
End Date	End Date
Story	Notes

Donations

Donations to a team or campaign can be given by any public user visiting the page. These donations are targeted towards a particular fundraising page (individual or team). A donation imported to Sumac from Fundful results in the creation of a Contact record for the donor's personal information, and a Donation record to hold the donation specifics.

Fundful Donation Record Field Name	*Sumac Donation Record Field Name*
ID	External Tax Receipt Number
Amount	Total Amount, Receiptable Amount
Received Date	When Received, When Receipted
Fundraiser ID (If this donation is for an individual fundraising page)	Soft Credit Contact ID
Fundraising Page ID	Campaign ID
Receipt Number	External Receipt Number

Fundful Donation Record Field Name	*Sumac Contact Record Field Name*
First Name	First Name
Last Name	Last Name
Email	Residence Email 1

Fundful Donation Record Field Name	*Sumac Contact Record Field Name*
Street	Residence Street A
City	Residence City
Province	Residence Province
Postal Code	Residence Postal Code
Country	Residence Country

Sumac Field	*Assumed Value*
Campaign Type	Campaign
Will Never Be Receipted	Check box is set

Receive Email

Introduction

Sumac can receive email directed to specific email accounts. This enables you to integrate incoming email messages with contacts and their communication preferences in Sumac, without having to switch between Sumac and your email software.

Here are some examples of how you might use this Sumac feature:

- You use Sumac to email an invitation to an upcoming event. The invitation tells people that if they are going to attend the event, they should click a link. When clicked, the link sends an email to a special purpose email account that was set up just for this purpose: invitationAccepted@myCharity.org. You then set up an email account in Sumac so that it can receive emails sent to invitationAccepted@myCharity.org. As Sumac receives the emails, you can reply, sending a message to the people who are coming to your event. The Receive Email command also enables you to record a communication to record the acceptance.
- When you send out your newsletter, you ask people who want to be removed from the newsletter to send an email to a particular address: newsletterRemove@myCharity.org. Sumac can receive these emails and turn off an outbound communication preference to ensure that that the sender does not receive the newsletter in the future.
- Your web site asks visitors to send an email to newsletterAdd@myCharity.org to start receiving your monthly newsletter. Sumac can receive these emails, add the new contacts to the database, and indicate that they want to receive the newsletter.

Notes for the Sumac Administrator

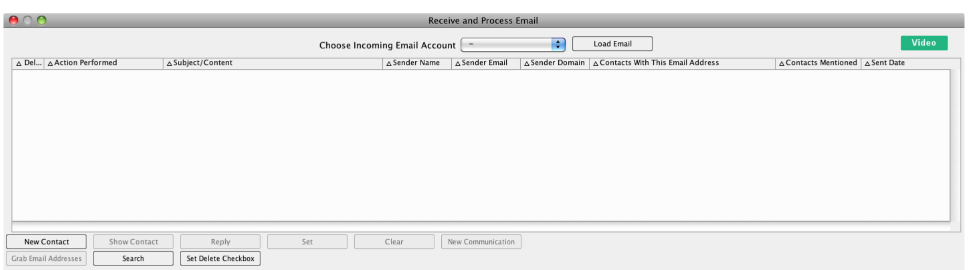
Before you can start receiving email, you need to use the Utilities/Customize Database/Lookup Lists command in the Sumac console to define incoming email accounts. In the Lookup Lists window, choose the Contacts area, and within this area choose the Incoming Email Accounts list.

See *Incoming Email Accounts* on page 625.

Starting To Receive Email

> Hint: Before you can use Sumac to receive email, your Sumac Administrator must configured Sumac to receive email, and your user profile must be altered to give you the power to receive email.

When you want to use Sumac to receive email, choose the Receive Email command from the Utilities drop-down menu. This window appears:



In order to receive email, use the drop-down menu at the top of the window to choose the account for which you want to receive email. Then click the Load

Email button. This causes Sumac to connect to the email server and download all the emails in the in-box for the specified account. The emails appear in the scrolling list.

Data in the List

The list shows the following columns:

Delete	This column holds a check box. When you close the window, or switch to another email account, Sumac gives you the option of deleting from the incoming email server all the emails that have been checked.
Action Performed	This column shows what actions you have performed on this incoming email.
Subject/Content	This column shows the subject and content of the incoming email message.
Sender Name	Sumac extracts the sender's display name from the each email that is received.
Sender Email	The email address of the sender.
Sender Domain	The domain name of the sender. The domain name is the part of the email address that comes after the @ symbol.
Contacts With This Email Address	This column shows a list of contacts in the Sumac database that have the address from which the email was sent.
Contacts Mentioned	This column shows a list of contacts in the Sumac database whose email addresses were mentioned in the body of the email.
Sent Date	The date when the email was sent.

You can double click an email to see all of its contents. In the scrolling list, incoming emails with HTML formatting show the HTML formatting codes, but when you double click, Sumac applies the HTML codes to format the email content.

> Hint: Some virus checkers add information to incoming email messages in a non-standard way and Sumac does not always manage to hide this information.

Buttons

New Contact

Click this button to create a new contact. If an email record is selected in the scrolling list, then Sumac extracts information from the selected email and puts the information into fields in the contact record. It fills in the first and last name fields, and the residence email address field.

Show Contact

When Sumac receives emails, it looks in its database to see if any contact in the database has the email address of each received email. If there is one or more contact with the received email address, then the contact(s) are listed in the last column of the scrolling list.

If you choose an email record, then click Show Contact, Sumac shows you the corresponding contact record.

Reply

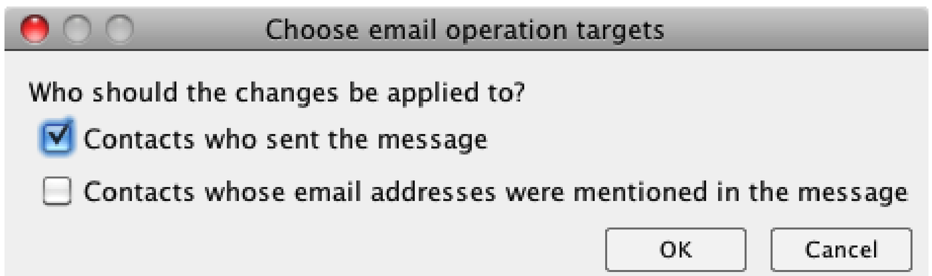
If you click to select one or more emails, you can then click the Reply button to compose a response, then send the response to the senders of the selected emails.

Set and Clear

The incoming email messages were sent to a particular email account. When the Sumac administrator defines the incoming email account, he can specify a communication preference associated with the account. For example, if the email account is *addToNewsletter@myCharity.org*, then the communication preference might be *Newsletter*.

Click the Set button to set the associated communication preference in the contact record identified by the incoming email. Click the Clear button to clear the communication preference.

When you click either of these buttons, you are presented with this window:



After making your choice and clicking OK, the next window allows you to specify exactly what should be done with the communication preferences for each identified contact.

Add and Remove

Click to select some emails that identify contacts.

If the email account for which you received emails is used to manage a particular type of outbound communication preference (e.g. your newsletter, or upcoming events mailings), the *Add* button adds this particular outbound communication preference to each identified contact. The Remove button does the opposite, removing this particular outbound communication preference from each identified contact.

New Communication

This button creates a communication record for each of the contacts identified in selected emails. When you click the button, you are prompted to fill in a communication record. A copy of that communication is then saved for each of the contacts.

When you create communications, Sumac puts the body of the incoming email into the Notes field of the communication record.

Grab Email Addresses

This button creates new contact records with email addresses extracted from the selected email messages. If an email message identifies a contact, then these new contact records are also related to that contact.

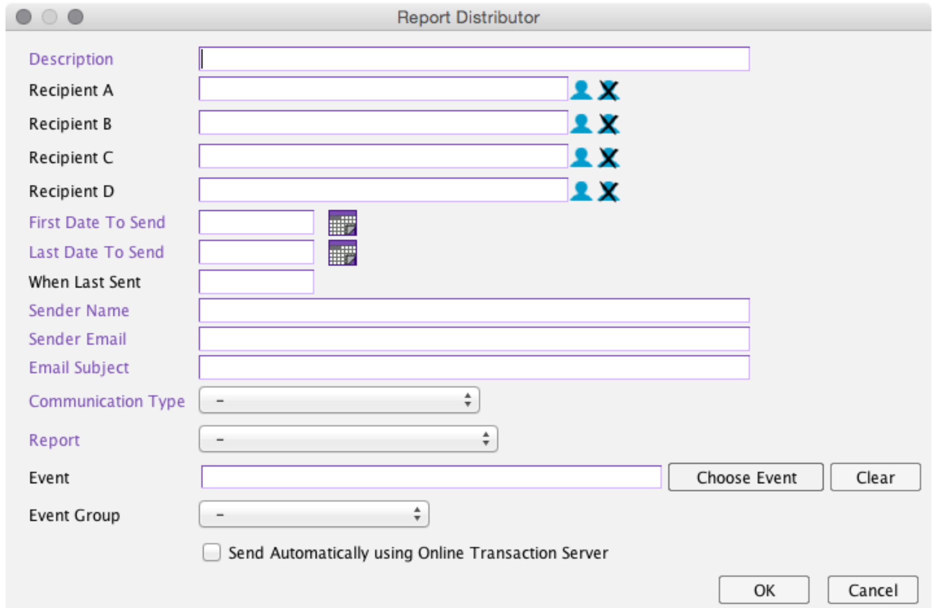
Search

Click this button to find emails that contain a specific piece of text. This is particularly useful if many of the incoming emails need to be processed in the same way: you can identify them by text in the messages, this button finds and selects them for you.

Set Delete Checkbox

If you have processed, or know you can ignore, several emails, then click to select them in the list. Click Set Delete Checkbox to mark all the selected emails as ready to be deleted.

Report Distributors



If you use Sumac's Ticketing module, you may want to frequently distribute reports to a pre-determined list of people. Sumac allows you to pre-define a report distributor to help you do this.

You can specify:

- the recipients
- when to start and end sending the report
- the sender and subject of the emails to be sent
- the type of communication record to save to indicate that the report was sent
- the type of report to generate and send (Event Sales Details, Event Financial Summary, Event Group Financial Summary)
- details of the report itself (which event or event group is being reported)

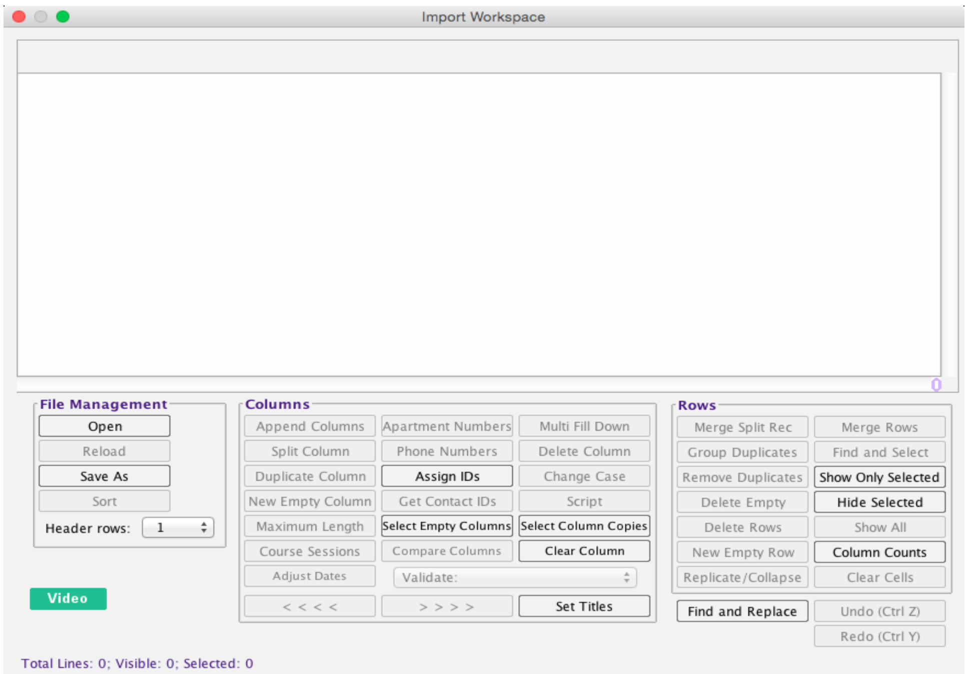
Import Workspace

Introduction

Data files coming from other systems may be inaccurate, incomplete, formatted incorrectly, or have other similar problems. It is usually not a good idea to just import such a file directly into Sumac, since the file may import incorrectly, or parts of it may be rejected on importing.

The Import Workspace enables you to validate the contents of a file, and clean them up before performing an import.

When you choose Utilities/Import/Import Workspace in the Sumac console, you are asked to choose the input file – a tab-delimited text file. After you choose the file, this window appears:



Cell Editing

Individual cells are editable. Just click on the data value that you want to edit, change it, then press Enter. Continuous editing of fields is allowed. If you have edited the value of a field, use the Ctrl-arrow, Tab, or Enter keys to move from field to field.

Row Selection

You can select and de-select single rows using Ctrl-click. Use shift-click to select contiguous rows.

Column Selection

Clicking a column title causes the column to be selected. You can also shift-click to click several contiguous columns, and you can control-click to select and de-select individual columns.

Vertical Split

The scrolling list can be split vertically. This is often useful for leaving a couple of columns – perhaps names – at the left side, and scrolling the rest of the data.

You get a vertical split by double clicking or clicking and dragging the splitter – a small rectangle immediately to the right of the horizontal scroll bar. The splitter can be dragged left and right. Double click the splitter bar to revert to an unsplit window.

Supported File Types

Import Workspace can open tab-delimited (txt) text files. It can also open comma-separated (csv) files.

Import Workspace can handle single- and double-byte characters, ASCII and Unicode, little-endian and big-endian.

When Sumac saves a file, it saves it in tab-delimited format. It always saves in Unicode, ensuring preservation of any characters.

On Opening a File

When you first open a file, you should do two things:

- ✔ Tell the Import Workspace how many rows in the file are actually titles, not data. Do this using the Header Rows drop-down menu described below on page 430.
- ✔ Make sure that any split records are put back together into one row. Use the Merge Split Rec button described below on page 435.

Buttons and Drop Down Menus

Open

Open a text file. If there is already a text file open, you are given the option of replacing the one already showing with the one being opened, or appending the incoming file to the one that is already open.

Reload

If you have opened a file, and made some changes that were incorrect, click Reload. It discards all changes made since you last loaded the file.

Save As

Save the window contents into a new file. Each time you use this button, Sumac generates a new file name for you. This enables you to save several versions of the data as you progressively transform it into what you want, ultimately just keeping the very last one for importing or subsequent analysis.

Sort

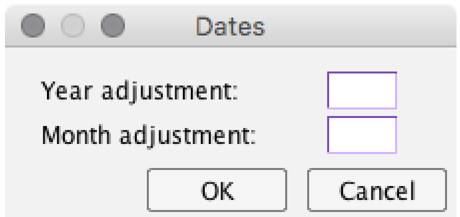
In other Sumac scrolling lists, clicking a column title sorts the list by that column. In the Import Workspace window, clicking a column title selects the column. If you want to sort, then click the column title to select the column for sorting, then click the Sort button. Then all rows (except header rows) are re-ordered to reflect the sort column's values.

Header Rows

Use this drop-down menu to tell Sumac how many rows at the start of the data file are actually header rows, not data rows. Rows that are designated as header rows do not get processed like other rows. Instead, they always stay at the start of the file and are not changed by editing or checking operations.

Adjust Dates

Click to select a column of dates that you want to alter. Click Adjust Dates. This window appears:



You can specify an adjustment for the year and the months in the dates in the column. Note that positive numbers move forward in time, negative numbers move backwards in time. You can adjust both the years and months at once.

Append Columns

The Append Columns button is used to concatenate the contents of selected adjacent columns. When the process is over, there is only one column where the selected columns used to be. The contents of the resulting column are the contents of the selected columns, appended together. If there is text in the columns, then they can be separated by some sort of delimiter.

For example, if you choose semi-colon and a space as the separator characters, here is what Sumac does:

First Column	*Second Column*	*Result*
Office Work		Office Work
	Event Management	Event Management
Office Work	Event Management	Office Work; Event Management

Click to select two or more adjacent columns whose data is to be concatenated. Click Append Columns. Sumac asks you to enter the characters that should separate values from the columns. Then it proceeds to process every row.

Apartment Numbers

Sumac contact records store apartment numbers in a separate field from a street address. This button extracts apartment numbers from street addresses and puts them into a separate column newly created immediately to the right of the street address column.

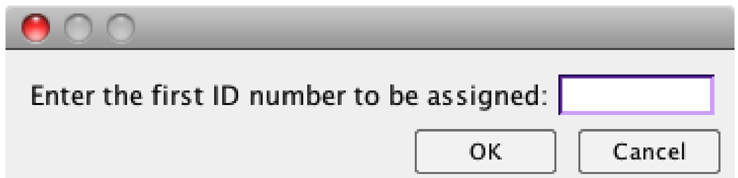
Use this feature by first clicking to select a column of street addresses, then clicking the button.

Assign IDs

Sometimes your data has single rows which represent two types of data: perhaps a contact name and address, along with a donation date and amount. In this situation, you must first import the contact. However, when you then import the donation information, you need to tell Sumac which contact made the donation. Your data has the contact names, but they may not be unique: there may be two John Smiths in your database.

The Assign IDs button helps resolve this problem. It lets you specify, in advance, the contact IDs to be used for the new contacts being created.

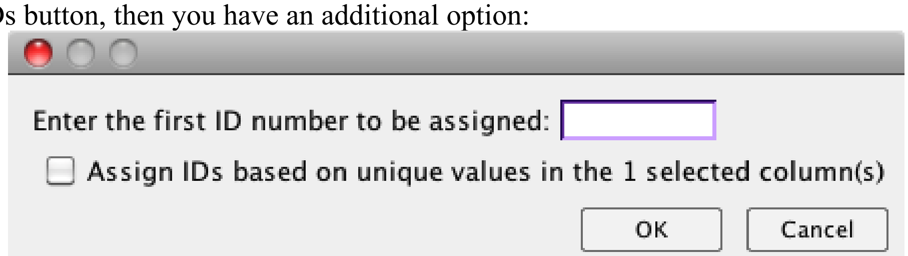
When you click the Assign IDs button, it asks for the first ID number to be used.



Specify a number that is one higher than the highest ID number already being used in the database.

Sumac adds a new column at the left side of the data, with the ID numbers assigned.

If one or more columns of data were selected when you clicked the Assign IDs button, then you have an additional option:



You can click the checkbox to tell Sumac to assign IDs based on unique values in the selected columns. If you choose this option, then each row still has an ID assigned to it, but if two or more rows are identical in the selected column(s) then the same ID numbers is assigned to those two or more rows. Here is an example: this data column was selected,:

Baker
Jamieson
Jones
Baker
Anderson
Jones

You told Sumac to assign IDs starting at 70 and to assign IDs based on unique values in the selected column. The resulting ID numbers would be as follows:

70	Baker
71	Jamieson
72	Jones
70	Baker
73	Anderson
72	Jones

Change Case

Choose columns of data to be modified. Then click this button to change them to lower case or title case. This is particularly useful when incoming data is all capital letters.

Clear Cells

Use this to clear specific selected cells in the file. When you click this button, Sumac clears cells at the intersection of the chosen rows and chosen columns.

Clear Column

Clear all the data in the selected column. Usually you do this after hiding some records (those you don't want cleared).

Column Counts

Show how many rows have how many columns. The window that appears also allows you to move forward, selecting the next line with a particular number of columns. This is useful for finding broken rows where, for example, a row with 10 columns has been broken in the middle resulting in a row with four and another row with six columns.

Compare Columns

Click to select two columns, then click the Compare Columns button. Sumac compares the values in each of the selected columns in each row, and selects the rows that are different.

Contact Names

This button checks if CONTACTS with the specified first and last names are already defined in Sumac.

Before using the button, click to select *two* columns. These should contain the first and last names of the CONTACTS. When you click the Contact Names button, you are asked to indicate which column contains the first name, and which contains the last name.

Then Sumac checks all the names. If a name *does* exist in the database, then it is considered to be valid and the row is not selected. If a row identifies a CONTACT who is *not* in the database, then it is considered to be an error and the row is selected.

Rows that name CONTACTS already in the database are not selected. You can then use the Show Only Selected button or the Hide Selected Button, depending on what you need to do with the data.

Course Sessions

Click to select two columns: the left-most one has a course name in it and the right-most one has a session start date in it. Then click this button to make sure that all the sessions are defined in the database.

Delete Column

Click a column title to select a column. Click the Delete Column button to remove that column from the data.

Delete Empty

This button deletes any row that has no value in a chosen column. For example, if your data looks like this:

Gavin	Frost		
Gavin	Frost	2006-01-02	phone call re donation
Gavin	Frost	2006-03-05	email re receipt
Harlan	Pelletier		
Harlan	Pelletier	2006-02-12	attended gala
Harlan	Pelletier	2006-03-01	email to solicit donation
Harlan	Pelletier	2006-08-19	phone call thanks for donation

you may want to delete the rows that contain nothing but a CONTACT's name. To accomplish this, click to select the third column (the dates), then click Delete Empty. Two rows get deleted so the data ends up like this:

Gavin	Frost	2006-01-02	phone call re donation
Gavin	Frost	2006-03-05	email re receipt
Harlan	Pelletier	2006-02-12	attended gala
Harlan	Pelletier	2006-03-01	email to solicit donation
Harlan	Pelletier	2006-08-19	phone call thanks for donation

Delete Rows

Delete the selected rows of data.

Duplicate Column

Click a column title to select a column. Click the Duplicate Column button to create a copy of the selected column immediately to the right of the selected one.

Get Contact IDs

Click to select columns holding information that can be used to identify a contact. Then click this button. For each selected column, Sumac asks you what is in each column.

The it creates a new column to hold the IDs of the contacts, positioning the column after the last of the two name columns. It then uses the information in the selected columns to find contacts in the database, and enters their IDs into the new column.

If, for a particular row, the selected columns do not identify a contact in the database, then Sumac selects the row to indicate an error.

If, for a particular row, the selected columns identify more than one contact, then Sumac puts the IDs of all the identified contacts into the new IDs column, and selects the row to indicate an error.

Find and Replace

Use this button to search for a specified value in the table then replace it with another. By default, Sumac ignores upper and lower case when searching, and will search the whole document for any combination of the characters you search for. You can change those defaults by setting the checkboxes in the find and replace dialog. Sumac also remembers your searches for each session, and populates the *Search For* and *Replace With* drop down menus with your past entries for quick retrieval.

Find and Select

This button prompts you to enter a piece of text that you wish to find. It then looks in the selected column for rows that contain a piece of text you enter. Each row that contains the text, is selected.

Group Duplicates

Hint: see *Remove Duplicates Button* below

This button moves lines around in the data file so that lines which have the same values in the selected columns are grouped together. No records are removed or changed, they are just re-ordered.

Here is an example. Assume your data has four columns: first name, last name, street address, and phone number. Here is the data:

Gavin	Frost		519-563-6907
Harlan	Pelletier	844 Adrian Place	416-451-9596
Gavin	Frost	299 Commonwealth	

Click to choose the first name and last name columns.

Gavin	**Frost**		519-563-6907
Harlan	**Pelletier**	844 Adrian Place	416-451-9596
Gavin	**Frost**	299 Commonwealth	

Click the Group Duplicates button. This causes the first and third rows to be positioned together at the start of the file, creating the following data:

Gavin	Frost		519-563-6907
Gavin	Frost	299 Commonwealth	
Harlan	Pelletier	844 Adrian Place	416-451-9596

Hide Selected

Show only the records that are not selected.

Maximum Length

This button can either find rows with cells that exceed a maximum length (number of characters), or truncate the cells to a specified maximum length.

Merge Split Rec

Sometimes data from a spreadsheet is being imported and a single cell contains a paragraph break. This causes Sumac (and any other program processing the data) to think there are two records. The Merge Split Rec button works as follows:

- ✔ Choose the two consecutive lines that are incorrectly being treated as two records because a cell contained a paragraph break.
- ✔ Click the Merge Split Rec button.

The button causes the two records to be merged into one. The last field of the first record and the first field of the second record are put into one cell with a paragraph symbol (¶) separating the text that used to be in two different cells.

Merge Rows

Sometimes data from a document, usually a PDF or word processing document, splits the data for cells into multiple lines. This button merges two rows together, doing a cell-by-cell merge that appends the data in cells above one another.

Moving Columns – <<<< and >>>>

Sometimes you need to move columns left and right. Perhaps you want to get two columns side-by-side so that you can append them together to make one column.

Click to select the column to be moved, then click the <<<< button to move it to the left, click the >>>> button to move it to the right.

Multi Fill Down

If a column contains missing values that can be filled from values above them, this button fills them for you. For example, if your data looks like this:

Gavin   Frost   2006-01-02   phone call re donation
2006-03-05   email re receipt
Harlan   Pelletier   2006-02-12   attended gala
2006-03-01   email to solicit donation
2006-08-19   phone call thanks for donation

then you may want to put the CONTACT's first and last names in each record after their name. This makes each record complete, and ready to import. Click to select the first column, then click Multi Fill Down, and the data gets changed to this:

Gavin   Frost   2006-01-02   phone call re donation
Gavin   2006-03-05   email re receipt
Harlan   Pelletier   2006-02-12   attended gala
Harlan   2006-03-01   email to solicit donation
Harlan   2006-08-19   phone call thanks for donation

Click to select the second column, then click Multi Fill Down, and the data gets changed to this:

Gavin   Frost   2006-01-02   phone call re donation
Gavin   Frost   2006-03-05   email re receipt
Harlan   Pelletier   2006-02-12   attended gala
Harlan   Pelletier   2006-03-01   email to solicit donation
Harlan   Pelletier 2006-08-19   phone call thanks for donation

New Empty Column

Click a column title to select a column. Click the New Empty Column button to create an empty column immediately to the right of the selected column.

New Empty Row

Click to select a row. Click the New Empty Row button to create an empty row immediately above or below the select row.

Phone Numbers

The standard phone number format preferred by Sumac is:

123-456-7890

Other formats like:

456-7890

(123) 456-7890
123 456 7890
123.456.7890

are converted to the standard format.

Sumac stores extension numbers in a separate field from a phone number. If a phone number contains an extension, the extension will be put into a separate column, newly created immediately to the right of the phone number column.

Use this feature by selecting a column containing phone numbers, then clicking the button. You are prompted to enter a default three-digit area code (so a 7-digit phone number can be turned into 10 digits). Then the actions take place.

Remove Duplicates

Hint: see *Group Duplicates Button* above

If you are assembling data from several files, or receiving data from sources which may have duplicates, you want to ensure that the duplicate records are removed.

Use the Remove Duplicates button by choosing the columns which should be searched for duplicates. These columns are often an ID number or perhaps the first *and* last name of a CONTACT.

Once you have selected the columns to be used to compare rows, click the Remove Duplicates button. Rows that have the same values in the selected columns are merged to create a single row with those values in the selected columns.

Here is an example. Assume your data has four columns: first name, last name, street address, and phone number. Here is the data:

Gavin	Frost		519-563-6907
Harlan	Pelletier	844 Adrian Place	416-451-9596
Gavin	Frost	299 Commonwealth	

Click to choose the first name and last name columns.

Gavin	**Frost**		519-563-6907
Harlan	**Pelletier**	844 Adrian Place	416-451-9596
Gavin	**Frost**	299 Commonwealth	

Click the Remove Duplicates button. This causes the first and third rows to be merged, creating the following data:

Gavin	Frost	299 Commonwealth	519-563-6907
Harlan	Pelletier	844 Adrian Place	416-451-9596

Replicate/Collapse

This button collapses several columns into a single column, replicating rows based on the values in the columns being collapsed. Here is an example:

If your file contains the following:

a	b	1		2
c	d	3	4	5
e	f		6	

and you click to select the third, fourth, and fifth columns, then click the Replicate/Collapse button. The file gets converted to this:

a	b	1
a	b	2
c	d	3
c	d	4
c	d	5
e	f	6

Select Column Copies

This button selects columns that are copies of another column. You are given the option of comparing case insensitively (*ABC* = *abc*) or case sensitively (*ABC* ≠ *abc*). Columns that are copies of other columns are often candidates for being deleted.

Note that the “original” is not selected. So if columns 3, 4, and 7 contain the exact same content, then columns 4 and 7 are selected, but column 3 is not.

Select Empty Columns

This button selects all columns that have the same value in every row (ignoring title rows). Often a column with the same value in every row has no useful information, so after using the button to select it, you can click the Delete Column button to delete it.

Set Titles

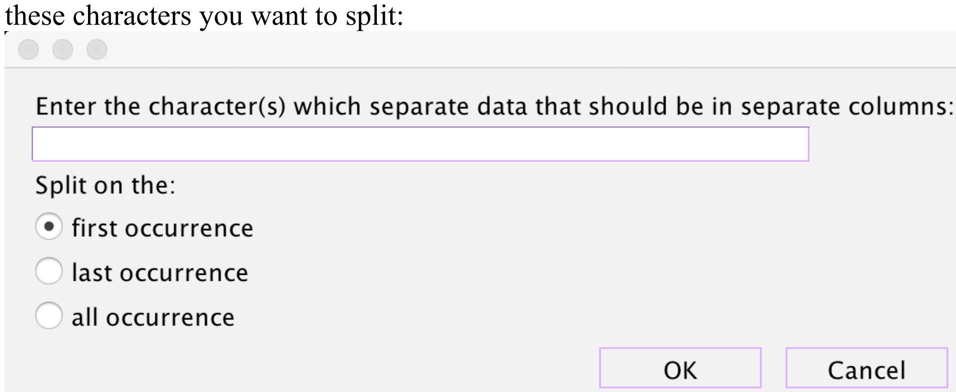
Click this button if you want the first row of your file to be used as the titles at the top of each column. When you click the button, Sumac instantly copies all the cells in the first row of the file into the column titles at the top of the list.

Script

Click to select one or more column. Then click the Script button. Choose a file containing editing commands (a script) to be performed on each cell in the chosen columns. This enables you to automate editing operations that would otherwise need to be done manually. See *Editing Scripts* on page 441.

Split Column

This command can separate the content of a single column into multiple columns. When you click this button, you are asked to enter the character(s) that separates the values from each other, perhaps a comma. Then specify which of these characters you want to split:



Here is an example: If the column selected contains the names of several events separated by commas, you could put these different event names into different columns. Perhaps one cell contains:

2004 Golf Day,2004 Christmas Party,2005 Golf Day

If you break this up at all the commas, the contents of this cell would be spread into three cells containing:

2004 Golf Day | 2004 Christmas Party | 2005 Golf Day

Validate

This drop-down menu lists various lookup lists. It can be used to verify that the values in selected columns are all valid values from the chosen lookup list. For example, if a column is supposed to contain payment types, click to choose the column, then choose Payment Types from the Validate drop-down menu. Sumac checks every value in the chosen columns to make sure that it is a known Payment Type. Listed below are the lookup lists that may require special knowledge or instruction when validating.

8-bit Character Set

Depending on how your database is set up, Sumac may only allow your data to be imported in an 8-bit character encoding. Use this option to have Sumac check that any column of incoming data is in the correct format. Sumac selects error lines that contain characters that do not fit into 8 bits.

Campaigns

Campaigns need to be formatted a certain way in order to indicate hierarchy. Use the vertical line character (|) to separate different levels in a hierarchical structure. For example: *2016 Campaign | Bee Rescue | Major Donors*. For more information on campaigns, see page 138.

Currency Amount

Use this option to have Sumac validate monetary amounts, and remove non monetary characters. Note that Sumac will indicate rows in error if you have a negative sign before the currency symbol, but will not find errors where you have the currency symbol first, then the negative sign (e.g -$7.50 is a problem, $-7.50 is okay).

Dates

Sumac can handle dates in several formats. This button lets you determine if Sumac is able to recognize incoming date information. Click to select the column(s) holding dates, then click the Dates button.

One date format that is not normally recognized, but which does sometimes occur in incoming data, is dd/mm/yyyy format (e.g. 31/12/2006). When you first click the Dates button, it asks if the selected data columns are in this format, since this format requires different processing than all the other formats mentioned above.

When you answer the dd/mm/yyyy question Sumac proceeds to convert the dates into yyyy-mm-dd format. If a date is not recognized, the line it is in will be selected, and you can examine it separately (scroll or click the Show Only Selected button).

Email (Correct Format)

Check the contents of the selected column to ensure that each cell contains a correctly formatted email address.

Email (Not Duplicate)

Check the contents of the selected column to ensure that each cell contains an email address that is not already in the database.

Feet' Inches"

Use this command to convert a column containing feet and inches to just inches. This is helpful for importing dimensional information. Here are examples of the formats that this command handles:

4'	4-1/2' 3"	4-1/2' 3 3/8"	40.05'
4 1/2'	4' 3 3/8"	4-1/2' 2-3/8"	4.0 1/2'
4-1/2'	4' 3-3/8"	4-1 /2'	4.0' 3"
4' 3"	4 1/2' 3 3/8"	4.0'	4.0' 3.5"
4 1/2' 3"	4 1/2' 3-3/8"	4.5'	4.0' 3 1/2"

Postal Codes (Validate)

This button validates and reformats U.S. and Canadian postal codes. The formats considered valid are:

12345
12345-6789
A3A 3A3

Use this feature by first clicking to select a column of postal codes, then choosing Postal Codes (Validate) from the Validate drop-down menu. Sumac analyzes each possible postal code and, if possible, puts it into a standard format.

Postal Codes (Repair)

Common errors in postal codes include the following:

- U.S. postal (zip) codes have leading zeroes removed by a spreadsheet. So postal code 01234 gets turned into 1234. Sumac can fix this by inserting the leading zero.
- Canadian postal codes are entered with similar looking but incorrect characters. For example, an I might have been entered where a 1 is correct, or an O entered for a 0. Sumac can substitute correct characters.

When you use this function of Sumac, it prompts you to confirm each change it makes. This is because the postal code being changed may actually be a valid postal code but it is for a country other than the U.S. and Canada.

Schema Entries

Schema entries need to be formatted a certain way in order to indicate hierarchy. Starting with the particular schema entry, use the vertical line character (|) to separate different levels in a hierarchical structure. For example: *Botany* | *Tree* | *Oak*.

Skill Type

Skill types need to be formatted a certain way in order to indicate hierarchy. Use the vertical line character (|) to separate different levels in a hierarchical structure. For example: *Background Check* | *Police Check*, or *Background Check* | *Reference Check*.

Time

Use this option to have Sumac check whether your time is in the correct format, such as hh:mm and not 2.5 hrs.

Validate Contact IDs

Sumac allows you to import data files that contain CONTACT IDs.

The purpose of the Contact IDs button is to determine if ID numbers defined in a column identify CONTACTS that have been defined in the database. Click to select a column holding ID numbers, then click the Contact IDs button. If an ID *does* exist in the database, then it is considered to be valid; if the ID in the file *does not* exist in the database, then it is considered to be an error.

This may be used to initially load CONTACTS, specifying their IDs as the loading occurs. In this case, you should select the column of IDs, then click the Contact IDs button. It determines if any of the CONTACT IDs are already defined in the Sumac database. If you are importing all new data, then you should ensure that none of the IDs in the file are in the database already. In this case, the Contact IDs button should consider every row in the file to be in error (i.e. containing an unknown ID number).

Alternatively, you may be intending to use the input file to update selected fields in the CONTACT records. In this case you will want to ensure that all the IDs in the data file are already defined in Sumac. In this case, the Contact IDs button should consider every row in the file to be valid.

Validate Currency Amounts

This command cleans up currency amounts that may have been formatted. It removes leading currency symbols, and also removes digit separators to the left of the decimal point.

Show All

If Show Only Selected or Hide Selected has been clicked, then click Show All to view all records again.

Show Only Selected

Show only the lines that are selected in the list of records. This is particularly useful if a previously executed command (e.g. Dates) has selected the lines that have invalid data in them. You can show only the selected, invalid lines; then edit them; then click Show All to see all records again.

Editing Scripts

An editing script is a file containing editing commands that can be applied to each cell in a chosen column in the Import Workspace. The script is a tab-delimited text file. Each line in the file is a separate command. Fields are separated by tabs. The first field on each line is the command. The subsequent columns are the parameters for the command.

Here are the available commands and their parameters:

Command (Column 1)	*Parameter Columns*	*Operation Performed and Example*

replace	Column 2: Old text
	Column 3: New text
		Replace the old text (in column 2) with the new text in (column 3). Note that the operations are case sensitive.
		Example:
		`replace Email email`
		`replace E-mail email`
		`replace e-mail email`

map	Column 2: number of map values to follow.
	The map command is followed by lines in the script file that contain two tab-separated values: the old value and what it should be turned into.
		Note that operations are *not* case sensitive.
		Example:
		`map 3`
		`em email`
		`tc telephone`
		`m paper mail`
		Hint: The data lines in the map contain a first column that is what Sumac should find and replace. The data lines may then have several columns, all of which will be put in the place of the single value being replaced.

Spreadsheet Warning

This section describes a common problem when manipulating data in a spreadsheet.

When you use the Import Workspace, it ensures that each row remains intact. There are no commands or operations that can mix the data in one row with another row.

Sometimes there may be a special data manipulation operation that the Import Workspace cannot perform. You may turn to a spreadsheet program to do it.

Exercise extreme care to ensure that each row of the spreadsheet keeps related rows of data together. Consider this situation. There are two records in your spreadsheet:

John	Smith	123 Main Street
Jane	Doe	456 Centre Avenue

You click the second column and choose the spreadsheet program's sort command. Here is what most spreadsheet programs do to the data:

John	Doe	123 Main Street
Jane	Smith	456 Centre Avenue

Notice that the second column was sorted, but that the other columns were not. If this happened in a file with hundreds of new records, the result would be disastrous. You would import or otherwise use badly mixed up data.

One way to prevent this mistake, or at least recognize it when it occurs, is to colour a few rows scattered throughout the file. That way, if the cells in rows get separated, the colour will be visible.

To continue the example above, if at the beginning of the process, we colour the first row:

John	Smith	123 Main Street

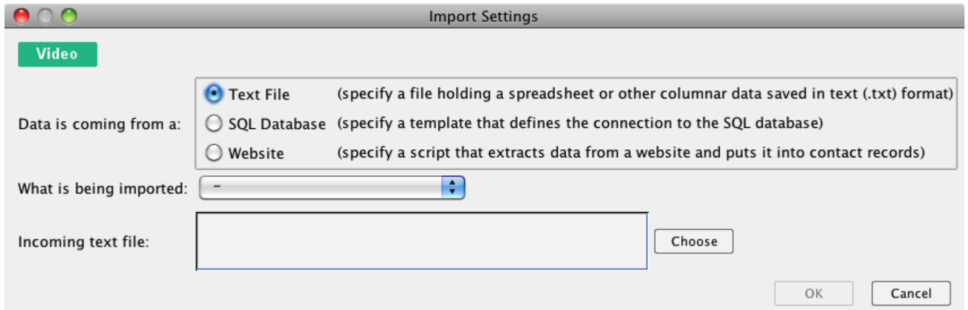
Jane	Doe	456 Centre Avenue

then the (incorrect) sort would be flagged by having colour and black mixed together on the same line:

John	Doe	123 Main Street
Jane	Smith	456 Centre Avenue

Import

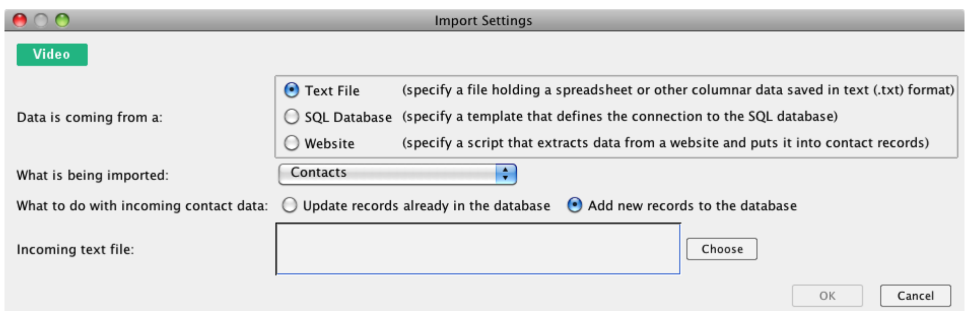
When you choose the Utilities/Import/Import in the Sumac Console, this dialog appears:



If you are importing from a text file, you can leave the *Text File* radio button selected. If you are importing from another SQL database, click the *SQL Database* radio button. If you are importing from a website, click the *Website* radio button.

Import From a Text File

If you are importing from a text file choose the type of objects being imported from the *What is being imported* drop-down menu. If you indicate that you are importing Contacts, then the dialog changes to the following format, and you should indicate whether you are updating or importing contact records:



If you are importing contact information, you have the option of updating contacts, using the incoming data file to add or change values in existing contact records. Alternatively, you can add completely new contacts into the database. Make your choice, then click OK.

Click Choose File to choose the incoming tab-delimited text file.

Then click OK.

Columnar File

Data can be imported into Sumac from tab-delimited text files.

> Hint: The Windows conventional file name for a tab-delimited file ends with *txt*.

A tab-delimited file contains field values, separated by tab characters, with one record in each line of the file. The columns contain values for a particular field.

For example, a file containing last names, first names, and name prefixes could contain these first three records. → represents a tab character, which is normally invisible in most editors, separating the fields in each line.

record 1:	McCarty→	Marlene→	Mrs.
record 2:	McKinney→	Ken→	Mr.
record 3:	Kennedy→	Dudley→	Mr.

> Hint: Use the Import Workspace (see page 429) to clean up the data before importing it.

> Hint: When importing currency amounts, ensure that the incoming file does not have commas or currency symbols in the currency fields. For example, turn *$12,345* into *12345* before importing it.

Hard Returns (Paragraph Breaks)

Some fields that you can import and export can contain hard returns or paragraph breaks. For example, the Notes field in a communications record can hold lots of text, broken into paragraphs by pressing the return key on your keyboard.

If you are importing data into a field that can hold hard returns, you should replace the hard return characters with these two characters: \n

When Sumac sees these two characters in a field that is allowed to hold hard returns, it changes the \n into a hard return.

> Hint: If you are exporting data from Sumac and some fields may contain hard returns, there is an option in the Export window to change hard returns into the two characters: \n

Tagged Files

The Utilities/Import/Import Tagged command is for importing tagged data. This is data that is not arranged in columns but instead each row indicates which field (column) it belongs to. At present, this command can only be used to update contact records.

Tagged files have the following format:

Column	*Content*
1	This column must contain “contact”.
2	This column contains the ID of the contact record that is to be updated.
3	The field name, identifying the contact record field that is being updated. These field names start with “c_” and can be found by using the Mail Merge Codes command. This column indicates which field is to be set to the value in the next column.
4	The new value for the column.

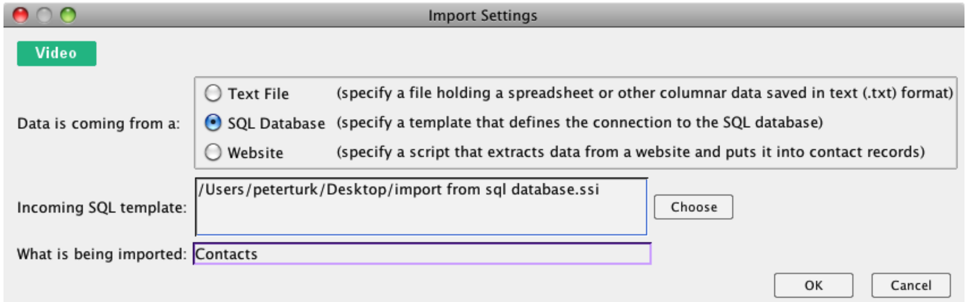
Import Origins

When you are performing an import operation, Sumac gives you the option to record the origin file for imported data. This way, you can open Utilities/Import/Import Origins to see a list of records that you have imported and the name of their original file. Use this area after an import in order to check that your data was imported properly.

Import From a SQL Database

Click Choose File to choose the SQL Import Template file that describes the import operation. Sumac automatically fills in the *What is being imported* field for you.

If the select statement in the SQL Import Template contains a substitutable date, then the dialog changes to the following format:

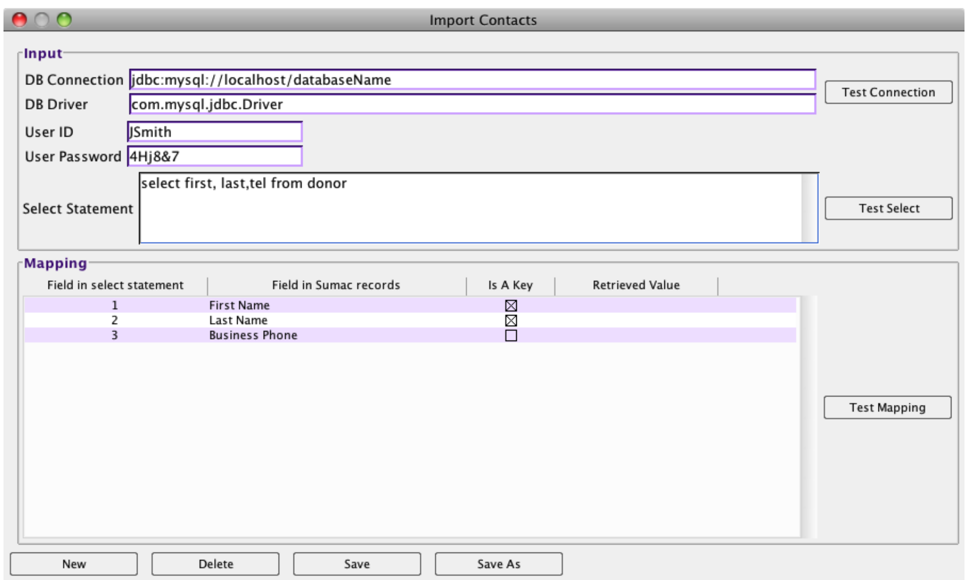


Enter a date value into the date field. Then click OK.

If you are going to import from another SQL database, you must create a SQL import template that tells Sumac how to get data from the database.

Choose the Utilities/Import/SQL Import Template in the Sumac Console, and choose New to create a new SQL import template. When prompted, choose the type of records that are to be imported into Sumac.

This window appears:



Describe How to Connect to the SQL Database

You must tell Sumac how to connect to the database from which it is importing data. The fields that tell Sumac this are:

- DB Connection: This connection information is formatted as required by the database manager being used. The sample in the picture above is typical for a MySQL database manager.
- DB Driver: Sumac comes provided with driver software for connecting to different databases. Specify the name of the software driver that Sumac should use.

- User ID and User Password: Specify the user ID and password that Sumac should use when it connects to the incoming SQL database.

When you have entered values into these fields, you can click the Test Connection. This causes Sumac to try to connect to the incoming database. Sumac will tell you if the connection succeeded or not.

Describe How to Get Data from the SQL Database

Data is read from a SQL database by specifying a select statement. Enter the select statement that Sumac should use to get data out of the database.

When you have entered the select statement, you can click the Test Select button to see if it works. Note that the select statement cannot work until the connection information has been specified and tested.

If the import operation being performed uses a where-clause that must have a user-specified date value, you can use *%DATE%* as a placeholder for the date. At the time of the import operation, the user will be prompted to enter the value of this date, which Sumac will then insert into the where clause.

Describe What to Do With Data from the SQL Database

In this part of the dialog, you must identify how the fields in the data from the incoming SQL database are supposed to be mapped to Sumac fields.

Each line in the scrolling list maps one incoming field to one Sumac field. Click New to create a new line in the scrolling list. Click to:

- Edit the number of the field coming from the select statement.
- Specify the field in the Sumac record that should hold the incoming field.
- Indicate if this field is a key. If the field is a key, then Sumac uses it to determine if it should add a new record in the Sumac database (no record has the incoming key field values), or update an existing record in the Sumac database (one record in the Sumac database is identified by the incoming values in the key fields).

If you created a mapping line that is not needed, click to select a line, then click the Delete button to delete it.

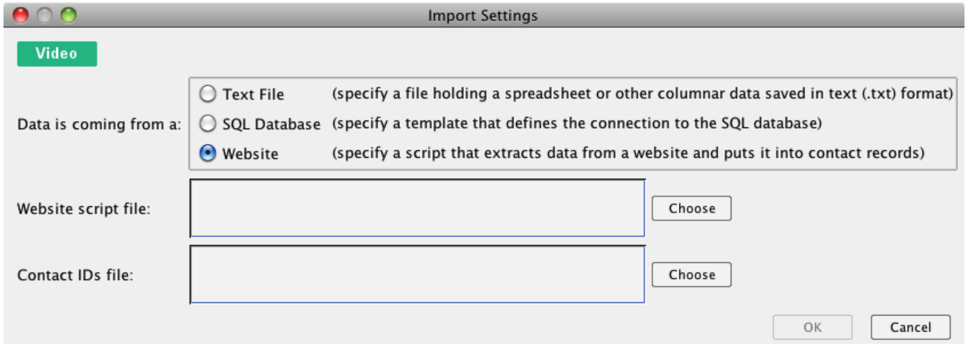
When you have set up the mapping, you can test it with the Test Mapping button. When you click this button, Sumac connects to the incoming SQL database, performs the select statement, then retrieves the first row of data and presents its values in the Retrieved Value column of the scrolling list. This enables you to check that fields match up correctly.

Save the SQL Import Template

Click the Save button to save a file that was opened previously. Click the Save As button to put the SQL Import Template into a new file.

Import From a Website

When you click to import from a Website, you see this dialog:



Choose the script file. Choose the IDs file that lists the IDs of the contacts you want to update.

When you click OK, Sumac asks you where you want to store a status file. Once you specify the status file, the import operation starts.

The import may take a long time so it shows a small progress window in the bottom right corner of your screen. If you close this window, the import operation stops.

You import from websites when you need to look up data on a website and import it into specific fields in contact records. Sumac can connect to a website, look up information, gather the information, and put it into specific fields in contact records. When you do an import operation from a website you provide Sumac with two pieces of information:

- a script file containing commands that tell Sumac how to get information from the web site, and
- an IDs file, containing the IDs of the contacts that you want to update from the website.

You can generate an IDs file lots of ways, perhaps by exporting contact IDs from the contacts list. When importing from a website, Sumac performs the commands in the script file once for each contact in the list. So if the contact IDs file has the IDs of 50 contacts, then the script file is performed 50 times.

The structure of the script file is simple. It is a tab-delimited text file. Each line in the file contains a command, then a tab, then a parameter to the command. Here are the commands that can be used.

Command	*Parameter*	*Description*
send	a URL	Sumac treats this URL like a template and performs a mail merge operation on it, inserting variable information from the contact record into the URL string before connecting to the website indicated by the URL. When the mail merge operation puts text into the URL, it encodes the text to be valid in a URL.
sendNS	a URL	The same as the *send* command, except that before encoding substituted text, it removes spaces from variables that are substituted by the mail merge operation. *NS* stands for *No Spaces*.

Command	*Parameter*	*Description*
cookie	cookies	Some sites from which you are gathering data may require you to send session or credential information in cookies. This command sets the cookies to be used for subsequent send and sendNS commands. Note that standard syntax for a group of cookies is: name1=value1; name2=value2; name3=value3
skipPast	text to find	After a *send* or *sendNS* command has been performed, Sumac holds the text (usually an HTML page) that was returned from the server. You can instruct Sumac to get useful information out of the text that was returned. When the text is returned, Sumac sets a pointer to the first character in the text. The skipPast command moves the pointer until it finds the designated *text to find* then positions the pointer at the first character immediately after the found text.
gatherTo	text to find	This command causes Sumac to gather text from the current pointer until it encounters the *text to find*. This gathered text can then be put into a contact record using the *set* command.
gatherToNS	text to find	This command works the same as the gatherTo command. However, it does not allow special characters in the gathered text. Sometimes the presence of special characters (usually paragraph breaks and tabs) indicates that the retrieved page is formatted differently than expected. If special characters are encountered, Sumac discards all the gathered text.
changeCase	*upper*, *lower*, or *title*	Change the case of the gathered text to upper, lower, or title case (capital letter at the start of each word). Online database often provide responses entirely in upper case letters, so this command lets you change to a more readable format.
set	contact field variable name	This command tells Sumac to put the gathered text into a field in a contact record. The field is identified by the parameter – the *contact field variable name*.

Command	Parameter	Description
wait	delay time (in seconds)	When you gather information from a website, you should not send one request after another, as fast as your computer can go. Doing this is a technique used by hackers (a distributed denial of service or DDoS) to attack a website, so it may get you black-listed by the Internet. So in each script, probably at the end of the script, you should add a wait of about 30 seconds. If you do not do this, Sumac will insert an automatic delay after processing each contact.

Special Behaviour of Certain Commands

If *gatherTo*, *gatherToNS*, or *skipPast* fail to find the text that they are looking for, then Sumac skips the command itself and all subsequent commands up to and including the next *set* command. This means that if the retrieved data is returned in an unexpected format, no value will be set in the CONTACT record.

The *send* and *sendNS* commands allow 15 seconds for the connection and 15 seconds for retrieving data from the specified URL.

Script Example

Here is a sample script. It uses postal codes to find the names and email addresses of Members of Parliament in the Canadian federal legislative body.

This character → represents a tab character, invisible in most editors. Also the line numbers in square brackets are not part of the scipt – they are there for convenience of explanation.

```
[1] sendNS   →  http://www2.parl.gc.ca/parlinfo/compilations/houseofcommons/mem-
                berbypostalcode.aspx?
                menu=hoc&PostalCode=<<c_Pref_Postal_Code>>
[2] skipPast  →  cphContent_repMP_ctl00_lnkPerson" href="
[3] skipPast  →  ">
[4] gatherTo  →  </a><
[5] set       →  c_mp_name
[6] skipPast  →  href="mailto:
[7] skipPast  →  ">
[8] gatherTo  →  </a>
[9] set       →  c_mp_email
[10] wait     →  20
```

Here is what these lines are doing:

[1] Creates a search string by inserting a contact’s postal code <<c_Pref_Postal_Code>> into a URL for a website that returns a page of information about a member of Parliament.

[2] Skips past some text to a position a line or so before the name field.

[3] Skips to the text immediately before the name of the Member of Parliament.

[4] Gathers up the name of the Member of Parliament, which ends with the designated text.

[5] Puts the gathered text into an extra field in the contact records The extra field was given the variable name *c_mp_name*.

[6] Skips to near the start of the email address.

[7] Skips to the first character of the email address.

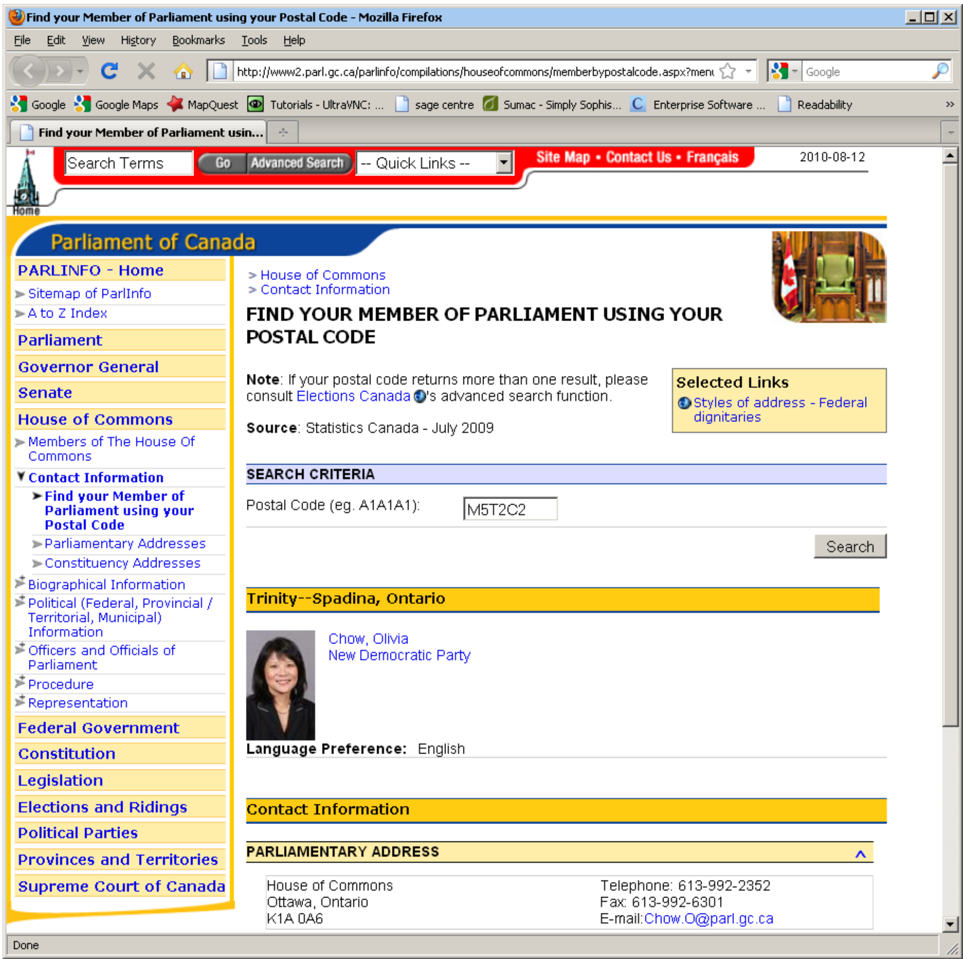
[8] Gathers up the email address.

[9] Puts the gathered text into an extra field in the contact records The extra field was given the variable name *c_mp_email*.

[10] Waits for 20 seconds before repeating the script for the next contact.

How to Figure Out What to skipPast and gatherTo

When you use a browser program to show the URL in the above example, it navigates to a page that may look something like this:

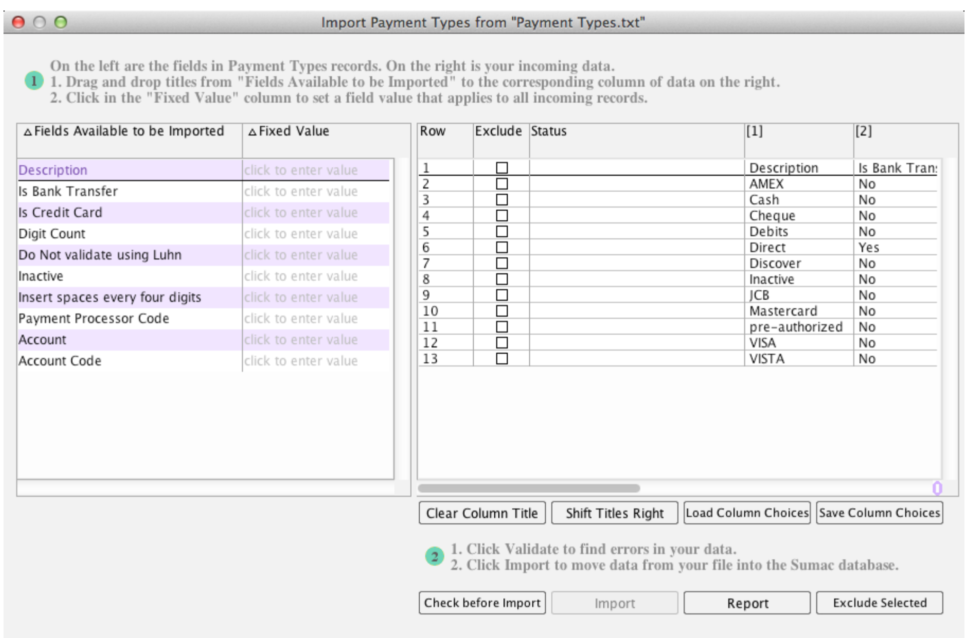


But underlying that view of the page is text, formatted using HTML rules, that describes or generates the page. Most browser programs refer to this underlying text as the *source* of the page. Browsers usually have a View Page Source command that presents this text in a separate window. The source of the above page looks like this:

You need to examine this source. Find the text you want to extract (e.g. the person's name), then back up a bit to the text before it. Use skipPast commands to move to the text that immediately precedes the text you want. Then use a gatherTo command to get the text, up to its end, that you want.

Import General Information

Depending on what you choose to import, there are minor variations in the appearance of the import window. The most basic situation is when you are importing data that has no connection to a CONTACT – usually lookup list content. The import window looks like this:



A typical flow of operations is as follows:

- click check boxes to exclude certain rows (e.g. rows which contain titles, not data)

- drag field names onto data columns, to indicate which column holds which field
- click the Validate button to check the data
- click the Import button to perform the import operation
- click the Report button to save a report about the importing that was performed.

Here is what the different parts of the dialog do:

Fields Available To Be Imported

This scrolling list on the left side shows all the importable fields in the type of data being imported. Use this list to tell Sumac that a particular field has a fixed value or to tell Sumac which column in the Data List holds the value for the field.

Fixed Value

If the same value should be used for all data records in the incoming file, then you can enter it in the Fields Available To Be Imported list. Click in the Fixed Value column to the right of the field name, and enter the appropriate value. For example, in the above picture, if you know that every incoming data record should have a Digit Count of 16, but that this column is not in the incoming file, then you can enter 16 beside Digit Count. When you click the Import button, Sumac will put 16 into the Digit Count field of every imported record.

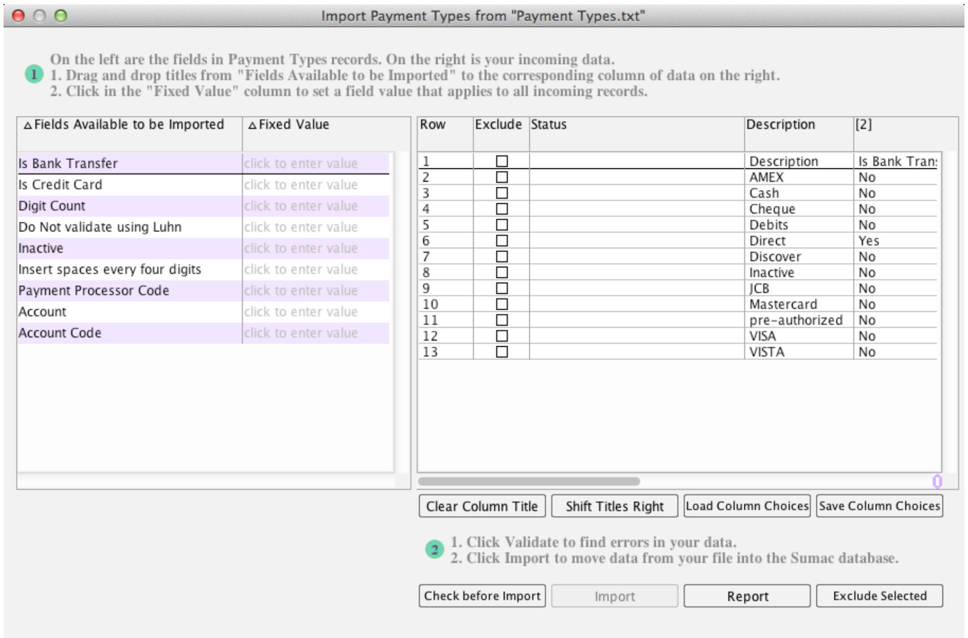
If you click to specify a value for a field whose values come from a lookup list, you are given a drop-down menu from which to choose the lookup list value.

Column In Data List

If a column in the incoming data file holds values for a field, then drag the field name and drop it onto the column (either the data in the column, or the column title itself).

> Hint: When dragging, before you let go of the mouse button, make sure the mouse pointer is positioned in the column holding the data whose field name is being dragged.

After the drag is completed, the dragged field name shows at the top of the column in the Data List. After the Description field is dragged from the list to columns on the left to the description column of data, the window looks like this:



Data List

The Data List shows all the data in the incoming file. There is one row in this list for each row in the incoming data file. Here are the columns that are displayed:

Row

This is the row number of the record. Click the column title of this column to sort the rows into their original ascending order.

Exclude

Click this check box to exclude a data record from validation and importing operations.

Status

This column contains messages about the status of the row. The status may indicate the row is being excluded, has been imported, or has an error that prevents import. If the status field is blank, this means that the row has no errors detected (by the Validate button) and has not yet been imported. Click the column title of this column to sort the rows into ascending order by this column's contents, thereby grouping similar status rows together.

Here is a list of the status messages that can appear, and what they mean:

exclude	This row was manually excluded by the user.
imported	This row has been imported.
missing mandatory fields	This row is missing fields that are mandatory for the type of record being imported.
cannot save to database	A system failure prevented saving the data to the database server.

inconsistent payment information in a pledge	A pledge record contains inconsistent payment information (e.g. it says payments are on the 15th of the month but has dates that are on the 10th).
contains error	This row contains an error. The fields that are incorrect are highlighted.
unknown contact	A contact referred to by this row is not in the database. The fields that identify the contact are highlighted.
ambiguous contact	More than one contact is identified by the fields that identify contacts (e.g. there are two contacts with the same name). The fields that identify the contact are highlighted.
cannot load contact from database	A referenced contact cannot be loaded from the database, probably because of a system failure.
maximum number of contacts exceeded	You are trying to import more contacts than your Sumac license permits.
duplicate first and last names	This message appears when you clicked the Check Names button and it finds that the name in this row is already in the database.

Data Columns

When first opened, the column titles contain column numbers ([1], [2], etc.). If you specify that a column contains a particular field, then the field name is displayed as the column title.

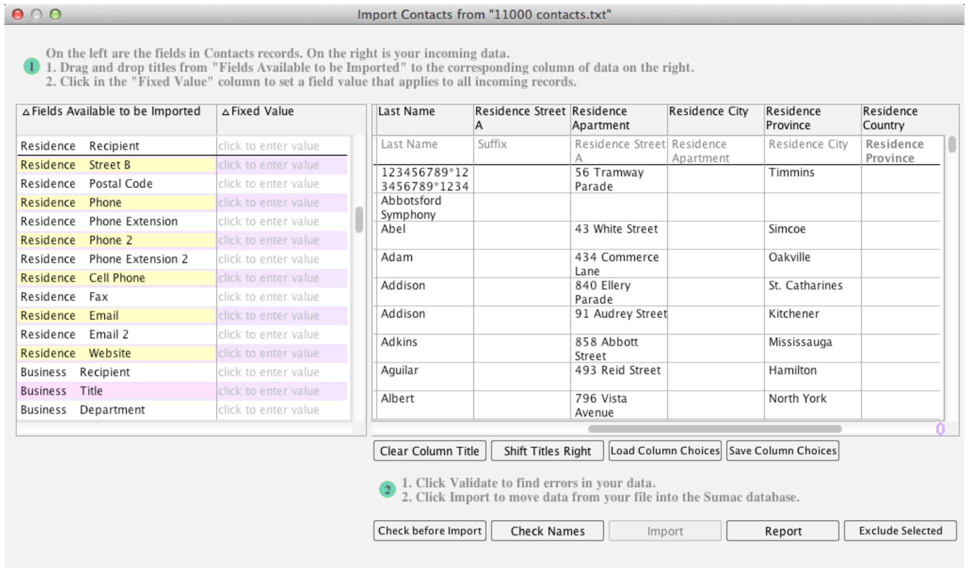
Clear Column Title Button

If you have specified that a certain column holds data for a particular field (e.g. that column [3] is a Description), then discover that this is incorrect, click to choose the column, then click the Clear Column Title button. This causes the column title to revert from Description back to its starting column number, and also causes the Description field to move back into the list of Fields Available To Be Imported (it is placed at the end of the available fields list).

Shift Titles Right Button

This button allows you to re-align columns when a new column has been inserted in data. This makes recurring import operations easier when the incoming data may occasionally have extra columns inserted in it. Imagine the following scenario:

You regularly import data from the same place. You do this often enough that you have used the Save Column Choices button (see below) to save the column settings for the incoming data file. You start to do this import again, and use the Load button (see below) to load the column selections. But things do not quite line up. See this picture:



Alignment is correct for the last name column, but after that, things are misaligned. This is because the data has an extra, unexpected column (Suffix). Instead of having to manually reassign every column to the right of the Residence Street A column, click to choose that column, then click the Shift Cols Right button. This causes all the titles, from Residence Street A onwards, to move to the right. All the fields are then aligned correctly and you can now drag the Suffix field to the correct column in order to make the Import work correctly for all fields.

Load Column Choices Button

If you have used the Save Column Choices button to save column selection information into a file, use the Load Column Choices button to restore the same column selections that you saved earlier. Click Load Column Choices and you are asked to choose the file holding column selection information.

Save Column Choices Button

After you have identified what data is in which column, you can save your column selection information into a file. Click Save Column Choices, and you are asked to specify the file into which you want this information saved. Note that the Load Column Choices button allows you to use this saved information for future import operations.

Check Before Import Button

After you have made some or all of your column selections, click the Check Before Import button. Sumac checks every cell in every row that is being imported. If any problems are detected, either with a row as a whole or with a particular cell, then the Status column in the Data List is set to an error message. Also, any particular cells that caused the error are highlighted in pink.

Check Names Button

If you are importing a contact list, Sumac asks if you would like to check the names from your list against names recorded in the database. Sumac tells you if there are existing contact in the database with the same names as the contacts you are looking to import.

Import Button

When you have specified what fields are in which columns, and clicked Validate to detect errors, you can click Import to import the data records. Note that rows that have messages in the Status column cannot be imported, and the Import button just ignores them.

If a row is imported, then the Status column indicates that it has been imported. If the import of a particular row fails, then the reason for the failure is indicated in the Status column. See *Status* on page 454 for a list of possible status messages.

Rows that have been imported are displayed as green. Once a row is imported, it no longer participates in subsequent Validate and Import operations.

Report Button

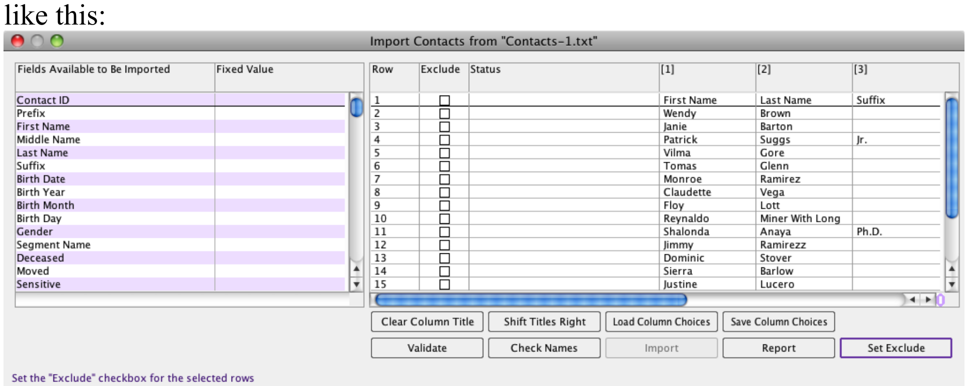
Click this button to save what is showing in the Data List: the first three columns of status information, and all the data columns. If you have been specifying columns, validating, and importing, this report tells you which rows have had what done to them, as well as identifying any individual cells that contain errors.

Exclude Selected Button

Select rows that you would like Sumac to exclude from the import. You can also use the Exclude Selected button when Sumac highlights cells in error and you choose to exclude them all.

Import Contacts

If the incoming file contains CONTACT records, and you indicated that you are importing new CONTACTS, not updating existing ones, then the Import dialog looks like this:



It is much like importing any other data except for the addition of a Check Names button, beside the Validate button. After you have dragged from the Fields Available To Be Imported list to the Data List, indicating columns that contain first and last names, you can click the Check Names button. This causes Sumac to check the database to see if there are any other CONTACTS with first and last names the same as those being imported. Records that contain names already in the database are flagged so that you can resolve the potential conflict, thereby avoiding adding a new CONTACT record for a CONTACT that is already in the database.

Special Fields

> Hint: The CONTACT types and COMMUNICATION types in the text file being imported must be spelled exactly the same as in your database (although upper and lower case differences do not matter). If you are unsure how a CONTACT type or COMMUNICATION type should appear in the incoming file, particularly when the field may contain more than one type, export a CONTACT and its CONTACT type or COMMUNICATION type information from your database into a text file, and examine the resulting exported file to view how the fields should be formatted.

This table indicates what Sumac expects to appear in certain fields being imported:

Field	*Content*
Contact Types	A list of the CONTACT types applicable to this CONTACT, separated by commas. For example, if your installation of Sumac supports CONTACTS of type *board member* and *alumni*, and one particular CONTACT whose CONTACT type information is being imported is both a board member and an alumnus, then the value of the CONTACT type field in the incoming tab-delimited file would be *board member,alumni*.
Communication Types	A list of the types of COMMUNICATIONS wanted by this CONTACT, separated by commas.
Deceased Use Business Address Sensitive Use Vacation Dates in Future	The four fields listed at the left all appear as check boxes in the dialog for editing a CONTACT. Here are the values that you can import into these fields: ◆ *yes*, *y*, *true*, *t*, or *1*: turn on the check box ◆ *no*, *n*, *false*, *f*, or *0*: turn off the check box
Gender Source Language Time Zone	Each of these fields must contain an entry from the corresponding lookup list used to choose a value for this field.
Picture	When importing contacts into your database, you can import their pictures by specifying the file path to the picture file.

Externally Defined IDs

Every CONTACT entered into a Sumac database is automatically assigned an ID number. You never edit these ID numbers. Normally, you do not specify them either.

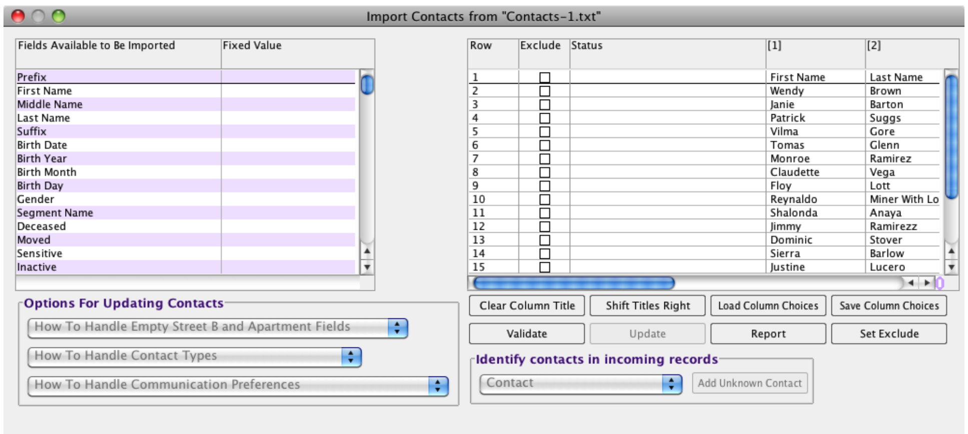
However, if you are doing an initial load of data from another system into Sumac, you may wish to preserve the ID numbers assigned by that other system. Sumac allows you to do this.

Prepare a tab-delimited text file of the data that is being imported. It will need to specify the ID for each CONTACT being imported. You must ensure that no ID defined in this file is already being used for a CONTACT record already in the

Sumac database. You must also ensure that no two records in the incoming file contain the same ID.

Update Contacts

You may have a list of externally generated information that provides extra details, or perhaps the value of a specific data field, for a group of CONTACTS. Sumac allows you to import this information, updating existing CONTACT records without creating any new ones. When you choose the Import command, and indicate that you are importing CONTACTS, you should also indicate that you are updating existing CONTACTS. When you do this, the import dialog gets three additional drop-down menus added in the bottom left corner, like this:



Here is what the three menus mean:

How to Handle Empty Street B and Apartment Fields

This drop-down menu enables you to specify how two address fields – Street B and Apartment – should be updated when other address fields are being imported and the Street B and Apartment fields in an incoming record are empty.

- Ignore empty fields in the incoming data: If the Street B or Apartment field in an incoming record is empty, then the corresponding fields in the CONTACT record are not affected at all.
- Clear the field in the contact record if Street A is present: If the Street B or Apartment field in an incoming record is empty, *and* a new Street A field is being imported, then the Street B or Apartment fields in the CONTACT record are cleared.

How to Handle Contact Types

If you are updating CONTACT types in the CONTACT records, you need to choose from this menu.

- Append the new incoming contact types: This choice causes incoming CONTACT type information to be added to the CONTACT types already in the CONTACT's record.
- Delete the old contact types and insert the new ones: This replaces the current CONTACT type information with the incoming ones.

How to Handle Communication Types

If you are updating CONTACT types, you need to choose from this menu.

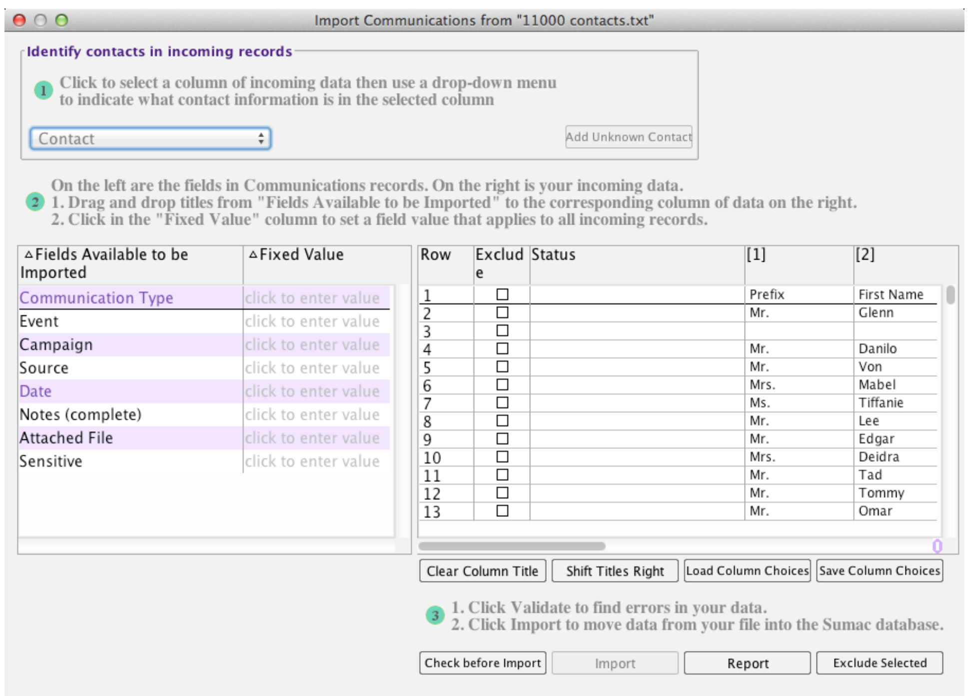
- Append the new incoming communication preferences: This choice causes incoming communication preferences information to be added to the communication preferences already in the contact's record.
- Delete the old communication preferences and insert the new ones: This replaces the current communication preference information with the incoming information.

Import Data That Refers To A Contact

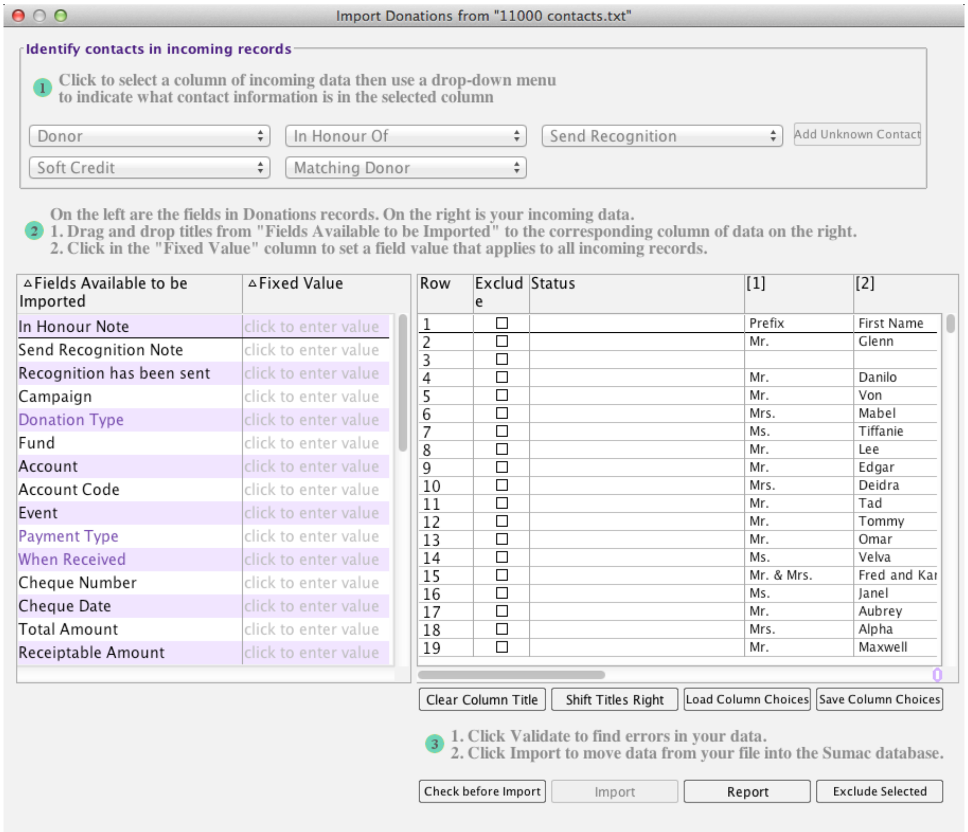
Hint: If you are importing Facts, see *Importing Facts* on page 463. If you are importing Ticket Orders, see *Importing Ticket Orders* on page 466.

Many types of data in Sumac refer to a contact. For example a communication record indicates the contact that sent or received the communication. A donation record may refer to up to four contacts: the donor, the contact in whose honour the donation was made, the contact to receive recognition for the donation, and the contact to get a soft credit for the donation.

When you import data that refers to a contact, Sumac adds an additional set of controls to the Import dialog. Here is what the Import dialog looks like when you import communications, which can refer to one contact. Notice the box in the bottom right corner of the dialog, labeled *Identify contacts in incoming records*, containing a drop-down list of contact record fields, and a button for adding unknown contacts.



If you import donations instead of communications, the *Identify contacts in incoming records* part of the dialog is similar but it has four drop-down menus – one for each of the fields in a donation that can identify a contact.



Here is how to use the *Identify contacts in incoming records* part of the dialog:

- Note that there is a separate drop-down menu for each of the fields in the incoming records that can refer to a CONTACT. So in the pictures above, there is one drop-down menu when importing COMMUNICATIONS, but four for importing DONATIONS. Each of these drop-down menus contains the same thing: a list of fields in CONTACT records which may be used to identify a CONTACT in the incoming data.
- You identify a particular CONTACT for an incoming record by clicking a column title in the Data List, then choosing from the appropriate drop-down menu the field that is in that column.
- When you click the Validate button, Sumac checks all fields that you have specified to identify a CONTACT. For the fields in each incoming record for each CONTACT, there are three possibilities:
  - The fields identify exactly one CONTACT. This is what you want.
  - The fields identify more than one CONTACT. This may be because two CONTACTS have the same first and last names. Sumac will not import information when the CONTACT is ambiguous. If there is another column in the incoming data (perhaps a postal code or middle name) that can remove the ambiguity, identify it to Sumac and try the Validate button again.
- The fields do not identify any CONTACT in the database. In this case, the Add Unknown Contacts button becomes active. If you click it, Sumac uses the columns you have used to identify an incoming CONTACT to create new

CONTACTS for the records that are flagged as referring to an unknown CONTACT.

Example: Import Event Attendance

If you have obtained a file that contains a list of first and last names of people who attended an event, here are the steps you would follows to create COMMUNICATION records for these people to indicate attendance at the event.

- ✔ Choose Utilities/Import/Import in the Sumac Console. Note that only users with the Bulk Import capability are allowed to use this command.
- ✔ Choose Communications from the drop-down menu to indicate that you are importing COMMUNICATIONS.
- ✔ If the file contains header rows or other rows that should not be imported, click the Exclude check box to tell Sumac to ignore these rows.
- ✔ Click the title of the column that contains first names, and choose First Name from the Contact drop-down menu in the bottom right corner. Click the title of the column that contains last names, and choose Last Name from the Contact drop-down menu in the bottom right corner.
- ✔ In the Fields Available to Be Imported part of the dialog, enter values for Communication Type (indicating attendance at an event), the Event, and the Date of attendance.
- ✔ Click the Validate button to check all the data.
- ✔ If a row status indicates *unknown contact*, then check to ensure that the CONTACT name is not misspelled or otherwise incorrect. If a row indicates *ambiguous contact*, then you need to either use other incoming data (if there are any) to resolve the ambiguity, or otherwise manually resolve the problem.
- ✔ If all the unknown contacts are truly not in the database, then you can click the Add Unknown Contact button to add them all to the database. Then click Validate again. At any time in this process, you can click the Import button to create communication records for rows that do not have an error message in their Status column.

Import Communications

Communication records can be imported to Sumac, along with all the fields within a communication. It is mandatory that records be linked to a contact, have a communication type and date. The other fields are optional. Before importing a communication, make sure you have entered any required communication types, campaigns and events (use Utilities/Customize Database/Lookup Lists). Sumac does not enter new information into lookup lists while it is importing, so the import fails if data in the fields does not match the corresponding lookup list. For more on lookup lists, go to 592.

Import Course Registration Information

When importing information related to course registration (e.g. registrations, exams, classes, class attendance), you must specify the session to which the record relates. You do this by specifying the name of a course and the start date of the session. These two pieces of information must be in the incoming file, and the course name must appear first (i.e. in a column to the left of) before the session date.

When importing session supplementary items (i.e. products that can be purchased as part of a registration), you must specify the product by name, and the session by ID.

To make it easier to prepare this data for importing, you can specify your own IDs for sessions, import them, then use those IDs to import the other data.

Import Donations

You can import influencers when you import each donation. The field to import should have one or more contact IDs, separated by commas.

You can import campaigns by specifying a full hierarchy of campaigns, separating parent campaigns from child campaigns using vertical bars, e.g. grandParent|parent|child.

Import Facts

When importing facts, you must make sure that the Fact Type field is specified before (i.e. in a column to the left of) the value that comes from a lookup list. This enables Sumac to identify the correct lookup list and both validate and save the lookup list entry correctly. For a key to all of the facts fields available to import, see page 119.

Skill Facts

If you import skill facts, the Lookup List value must be the name of a skill. This can be just the skill's name. Alternatively, if your skill names are not unique, because the same skill may be named under multiple skill types, you can specify a qualified name for the lookup list value. Enter the name of the skill type, then a vertical bar |, then the name of the skill.

Import and Update Grow-Your-Own Records

Sumac can update Grow-Your-Own (GYO) records. Just as when you update contact records, you need to tell Sumac how to identify the records being updated. You can use almost any field in the GYO records to identify them.

Schema Entries

You can import data into schema entry fields in Grow-Your-Own records. When you do this, the format of the incoming data must be as follows:

Each value being imported should consist of the name of the schema followed by the top level entry, then the second level entry, and so on for all levels that are to be specified. These values are separated by slashes (/).

For example, this text:

```
Animal|Dog|Small|Chihuahua
```

specifies an entry from a schema named *Animal*. The top level entry is *Dog*, the secondary level is *Small*, and the third level in the hierarchy is *Chihuahua*.

Import Invoices

When you import invoices, you can import up to two payments per invoice. You need to provide a date, amount, and payment type for each payment. The payments are automatically connected to the invoice as they are imported.

Import Lots

When importing lots into your database, you can import their pictures by specifying the file path to the picture file.

Import Payment Allocations

Payment allocation records allocate a payment to a sale, a course registration, or a specific type of Grow-Your-Own record. The ID of the record to which the payment is being allocated must be a column in the incoming data. There must also be a column which holds the type of the record to which the payment is being allocated, and this column must precede (be to the left of) the column holding the ID.

Import Pledges

You can import campaigns by specifying a full hierarchy of campaigns, separating parent campaigns from child campaigns using vertical bars, e.g. grandParent|parent|child.

If the pledge data being imported indicates the number of payments instead of a final payment date, then you can import this and Sumac calculates and sets the final payment date for you. However, the start date and frequency of payment fields must be imported first (i.e. they must be in columns to the left of the incoming payment count) for this to work properly.

Import Reminders and Action Plans

There are three options in the import area to bring in data about reminders and action plans:

- Action plans: Import the name and details of each action plan. Action plans appear in Utilities/Customize Database/Lookup Lists/Reminders/Action Plans.
- Action steps: Import the steps that correspond to each action plan. Action steps are parts of action plans.
- Reminders: Import reminders, along with details of time, description and status. Reminders are in Time & Scheduling/Reminders - List or . Reminders - Calendar

Import Schema Entries

You can import schema entries. First define the schemas. Then import the entries into it. Two fields (columns) of data can be imported:

Usage: How the entry should be used

Terms: The name of the schema, then the term and all its parents, separated by vertical bars.

Here is an example. This file:

```
Animal|Dog|Small|Chihuahua
Animal|Bear|Big|Grizzly
Animal|Bear|Small|Black
Animal|Dog|Medium|Spaniel
Animal|Dog|Big|Shepherd
Animal|Dog|Big|Great Dane
Animal|Bear|Small|Raccoon
```

produces the following hierarchy in a schema named *Animal*:

```
Bear
    Big
          Grizzly
    Small
          Black
          Raccoon
Dog
    Big
          Great Dane
          Shepherd
    Medium
          Spaniel
    Small
          Chihuahua
```

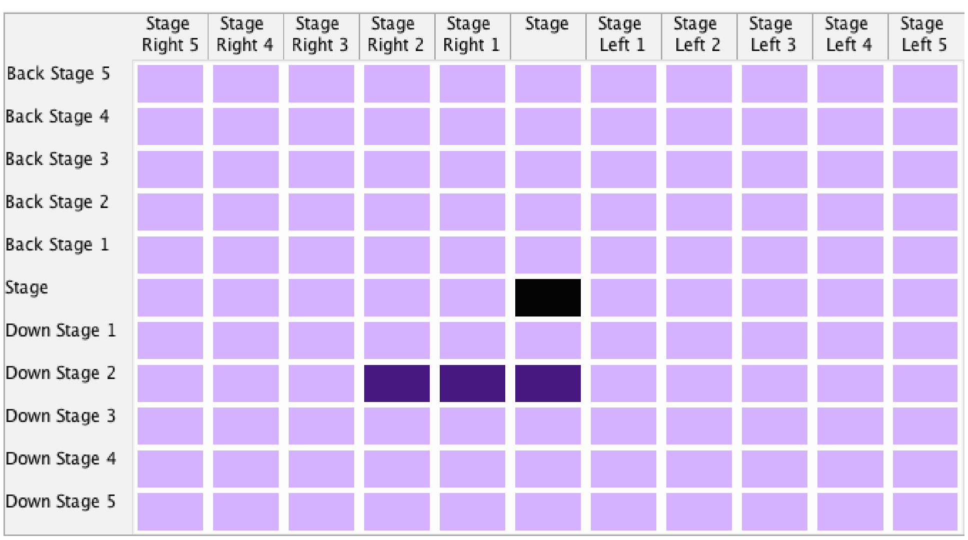
Hint: If you try to import an entry that already exists in a schema, you will get this somewhat obscure error message: *missing mandatory fields*.

Import Seat Blocks

When you import seat blocks, you may want to specify the position of the seat block relative to the stage in a theatre. This is done using four numbers:

Position X	The horizontal coordinate of the left-most position. The stage is zero, stage left is positive, stage right is negative.
Position Y	The vertical coordinate of the top-most position. The stage is zero, down stage is positive, back stage is negative.
Position Width	The number of horizontal positions occupied by the seat block
Position Height	The number of vertical positions occupied by the seat block

For example, the seat block defined in the following picture would have these numbers: X = -2, Y = 2, Width = 3, Height = 1



Import and Update Submissions

The Sumac import command is able to both import new submissions and update submissions that are already in the database. This enables a more dispersed process (e.g. using spreadsheets) when evaluating submissions.

If you want to update the submissions, you must identify the submission that is already in the database by means of its internal ID number. The process is typically like this:

- ✔ Enter the submissions into Sumac.
- ✔ Export them to a text file, being sure to include the ID numbers.
- ✔ Edit the text file (or parts of it) using tools external to Sumac.
- ✔ Use the edited data to update the submissions in Sumac, using ID numbers to identify the records to be updated.

Import Tasks

When you import tasks, the skills can be imported. If there are several skills, separate them by commas. If a skill requires a skill type to be uniquely identified, then put the skill type in front of the skill, separated by a vertical bar |. For example, this would import three skills into a task:

```
administrative|enter data, client support|support, paperwork
```

Import Ticket Orders

When you import ticket orders, most fields are independent of one another – they can be imported in any order. However, because of inter-dependencies between some fields, they must be imported in a specific left-to-right order. Here are some fields that need special care:

Column	*Notes*
Ticket Amount	Ticket Amount is the total currency value of all tickets in the order. If tickets are being imported, the Ticket Amount field must occur before (i.e. to the left of) Low Ticket Number. This enables Sumac to create the low ticket and apply the total amount for all tickets to that single ticket. All other tickets in the ticket order are given a price of 0.00, so the total price will be correct.
Payments	Hint: This description relates to importing payments as columns in a ticket order file, which is simpler, but limited. You can import any number of payment records and link them to ticket orders. You may import up to three payments per order. You specify the amount, date, and payment type of each one. If you omit the date, Sumac uses the date of the order. If you omit the amount, Sumac uses the total amount of the order. If you omit the payment type, then Sumac ignores the payment and does not save it into the database.
Event	This field defines the event to which this ticket order applies. If tickets are being imported, this field must be before (i.e. to the left of) Low Ticket Number and High Ticket Number so that the ticket numbers can be interpreted correctly.

Column	*Notes*
Low Ticket Number	If the ticket order has only a single ticket, then its number should be in this field. If the ticket order has multiple consecutive tickets, then this field should be the lowest numbered seat in a seat block. If Ticket Amount has been specified in a column to the left of the Low Ticket Number, then the Ticket Amount is set as the value of this low-numbered ticket. Hint: Ticket numbers need to be valid according to the seat blocks defined for the event's venue. For example, if a seat block indicates tickets have a prefix of A and seats are numbered 3 to 10, you must specify: *A-3*, *A-4*, etc. Just entering 3 will not work. Nor will it work to specify *A-2* if the seat block runs from A-3 to A-10. Hint: If you want more control over importing tickets, see Importing Tickets on page 468.
High Ticket Number	This is the highest numbered seat of a seat block. Sumac adds all tickets from Low Ticket Number to High Ticket Number, inclusive, to the incoming ticket order. If the field High Ticket Number is not specified, then this imported ticket order will have only a single ticket. Hint: If you want more control over importing tickets, see Importing Tickets on page 468.
Ticket List	Import a list of tickets for an event, and allow each seat to have it's own discount level. Create your ticket list with each event's tickets separated by ";"from others. The syntax looks like this: event: ticket,discount,ticket,discount; event: ticket,discount,ticket,discount The list of tickets is separated by commas and consists of pairs of entries: a ticket identifier in the first part of the pair, a discount in the second part of the pair Here is a sample: C8: Rit-30,,Lft-8,early bird This imports two tickets into an order. Both tickets are for event C8; the first ticket is seat Rit-30 and is full price (no discount). The second ticket is seat Lft-8 and gets an early bird discount. Special case in syntax: If only importing one ticket, the discount can be omitted. For example, this is acceptable: C8: Rit-30

Import Tickets

If you want to specify more details about the tickets in an order, you can put all the ticket details into one column (labelled *Ticket Details* in the import dialog) which contains information about the event, the number of tickets, and the applicable discount. Here is the syntax of what goes in the *Ticket Details* column:

```
event: quantity discount, quantity discount; event...
```

For example, this:

```
MacBeth: 3 adult, 2 senior; Hamlet: 120 children, 10 adult
```

means that the order holds tickets for MacBeth (3 adult and 2 senior tickets) and also tickets for Hamlet (120 children and 10 adult).

Hint:

- The quantities are all simple integers, zero and negative numbers cause the quantity and discount to be ignored.
- The discounts are all discount names (from the price scheme used by the event). If no discount is specified, then Sumac assumes the ticket was not discounted: i.e. a full price ticket. So this:

  ```
  MacBeth: 3, 2 senior
  ```

  means that there were 3 full priced tickets and 2 senior tickets for MacBeth.
- The events can be fully qualified event names. So if Hamlet was on two dates, the date can be added after the name. So this:

  ```
  Hamlet, 2014-08-01: 120 children; Hamlet, 2014-08-02: 120
  children
  ```

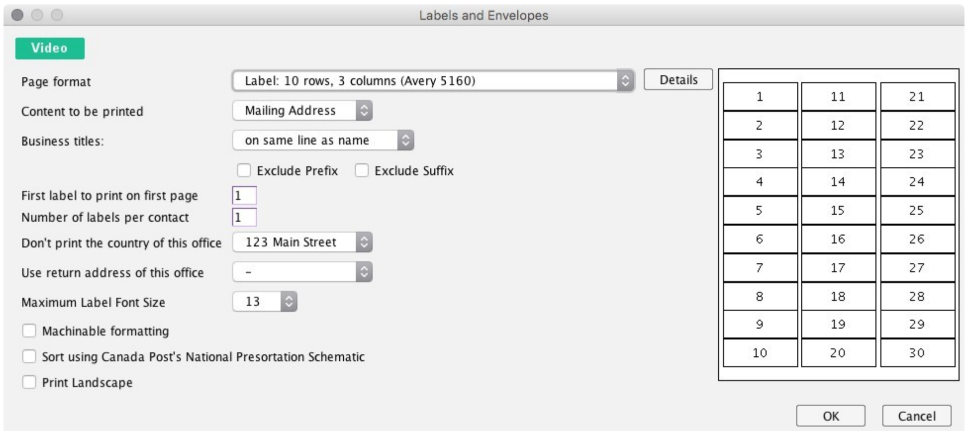
  means that the order holds 120 children tickets for the Hamlet performance on August 1, and also 120 children tickets for Hamlet on August 2.

Labels, Envelopes, and Name Tags

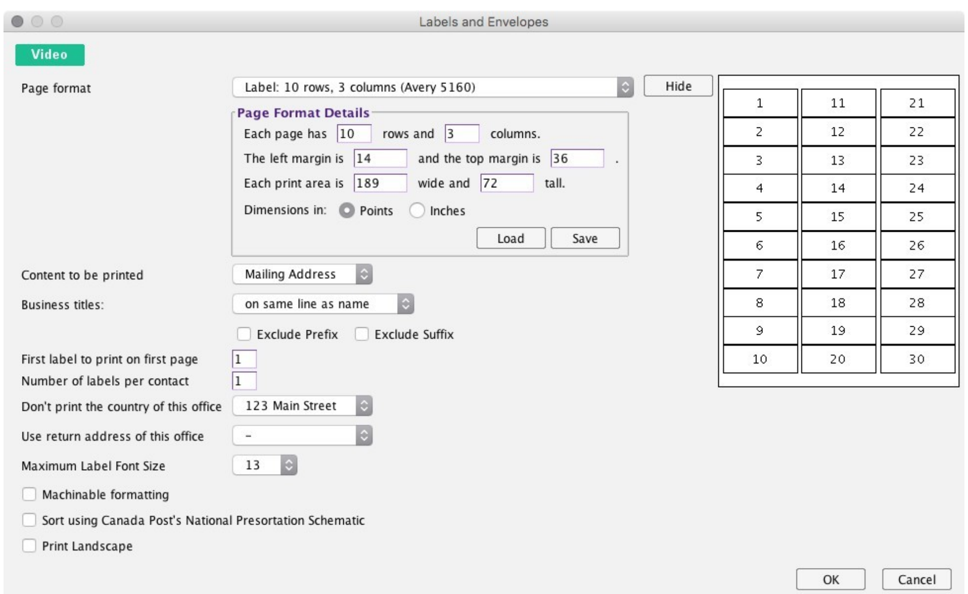
Overview

Several lists in Sumac provide a Labels/Envelopes button. This button enables you to print labels or name tags on sheets with multiple labels or tags. It also enables you to print directly on to envelopes. Here is how to use this button:

- ✔ When you click the Labels/Envelopes button, and choose the CONTACTS for which you want to create labels, you are presented with this dialog:



- ✔ Click to choose entries in the list. These entries identify CONTACTS, perhaps directly because you are working in the CONTACTS list. The list may identify CONTACTS indirectly: for example if you are working in the DONATIONS list, then a selected DONATION identifies the CONTACT who made the DONATION.
- ✔ Choose the page format of the labels or envelopes you are using from the pre-defined Page Format drop-down menu. As you choose a different format, the page picture updates to show what the page should look like. If the drop-down menu does not contain the type of labels or envelopes you are using, then click Show button to see extra information in the dialog:



- ✔ You can manually type values into the Page Format Details text fields to define the layout of the paper stock that you are using. Note that dimensions can be specified in points (there are 72 points per inch) or inches. Together these details specify the size of each label and how many are on the page:
  - The number of rows and columns should both be 1 if you are printing individual envelopes. If you are printing sheets of labels or cards, then specify how many rows and columns are on each sheet.
  - The margin settings indicate the distance from the left and top of a sheet to the first printing area.
  - The printing area dimensions tell Sumac how large each label is or, if you are printing envelopes, how large a space on each envelope should be used for the address. Note that Sumac adjusts the size of the text to be bigger or smaller depending on both the size of the printing area and how much text is to be printed.
  - If you are likely to use your custom settings again, you can click the Save button and save them into a file. Then, the next time you need to print custom labels, use the Load button to restore the saved settings.
- ✔ Next, choose from the Content To Be Printed drop-down menu whether you wish to print the *Mailing Address* (name and address), a *Name Tag* (name only), or a *Custom Layout* for each selected CONTACT. If you choose Mailing Address, Sumac formats name and address information. If you choose Name Tags, Sumac centres the CONTACT'S name on each label. If you choose Custom Layout, then Sumac uses the detail section of a layout to format each label that is printed. To learn how to create a layout, see *Layouts* on page 473.
- ✔ If you chose to print *Mailing Address*, then you may specify how a contact's title should appear: on the same line as the contact's name, on a separate line, or not at all.
- ✔ Names can include a prefix (e.g. Mr, Mrs) or suffix (e.g. Esquire, B.A.). You may choose to include or exclude these. Note that Utilities/Customize Database/Preferences/Salutations lets you specify how names should appear for all users, and the checkboxes to exclude prefix and suffix only apply in the situation where the preferences would normally include prefix and suffix.
- ✔ Sumac prints sheets of labels arranged in rows and columns. As it prints successive labels, Sumac positions them down each column. The picture in the label dialog shows how Sumac numbers each label. So a page with eight labels (four rows of two columns) would print in the order illustrated by the following table. Perhaps the last time you printed labels with Sumac, you used up labels 1, 2, and 3 on a page. The next time you print labels, rather than throwing out a page that still has five empty labels on it, you can start at position 4 by entering *4* in the *First label to print on first page* field.

1	5
2	6
3	7
4	8

- ✔ Usually you do not want to print the name of the country in which the labels are being used. For example, if the labels are being put on envelopes to be posted in Canada, then you would not need to print *Canada* on every label. Sumac allows you to suppress the printing of country names by choosing the office that will be mailing the labels. If you choose an office, then Sumac does not print any country names that are the same as the one in the selected office record.

- ✔ If you are printing directly on envelopes, and having Sumac print the return address, you can choose which office's return address should be used from the *Use return address of this office* drop-down menu. If you do not want Sumac to print the return address, choose no office from this drop-down menu.
- ✔ You can specify the maximum size font that should be used for labels. Usually leaving this set at the default value works best, but if you are using unusually small labels or have unusual line-wrapping problems, forcing Sumac to use a smaller font may help.
- ✔ You can specify that you want to print multiple copies of each label.
- ✔ There are two check boxes that can be used to get lower postage rates from the post office:
  - *Machinable formatting*: This check box tells Sumac to create mailing labels that can be automatically read by automated sorting equipment. Machinable labels have limited font sizes (it is possible that some mailing addresses will not fit on some label sizes), use a mono-spacing font, and have special restrictions (which Sumac enforces) on punctuation in the address.
  - *Sort using Canada Post's National Presortation Schematic*: This check box tells Sumac to sort the labels into the order dictated by Canada Post's National Presortation Schematic. If you click the check box to tell Sumac to use the Presortation Schematic, Sumac asks for the Presortation Schematic in the form of a text file. Here is what you do to create the text file: The Presortation Schematic is a document updated on the Canada Post web site every few weeks. When you are about to do the mailing, download the applicable Presortation Schematic (they vary depending on what you are mailing) as a PDF document. Use Adobe Acrobat to save the PDF document as a text (.txt) file. If you open it, the text file will look very messy, but Sumac has the ability to understand it, and apply it to your mailing.

Hint: Connect to the Canada Post website: canadapost.ca. Type *National Presortation Schematic* into the search box, and click Search.

- ✔ When you click OK to the Labels and Envelopes dialog, you are asked if you want to send the labels to the printer, a file, or the screen. If you direct labels to the screen, they are displayed with boxes around each label, but these boxes do not print when the labels are sent to the printer. The boxes help you determine if the formatting is appropriate.
- ✔ After all the labels are printed or saved, you are asked whether you want to save a COMMUNICATION record for each label or envelope being created:
- ✔ If you click Yes, you are asked to specify the details of the COMMUNICATIONS to be created. You cannot choose a CONTACT in the COMMUNICATION dialog, because a COMMUNICATION record is going to be created for all CONTACTS for whom a label was printed. You can, however, specify any of the other fields that are appropriate for all the COMMUNICATION records.

Showing A Contact

When you are viewing labels on the screen, they may look like this:

The grey numbers in the top right corner of each label is the ID of the contact whose mailing address is being displayed. If you notice that a label is incorrect (e.g. the label of Mrs. Booker in the top right corner), you can click the Show button, enter the contact ID, and edit the contact's address. Sumac will not immediately update the label on the screen – you will have to repeat the Labels command to update it.

Layouts

Introduction

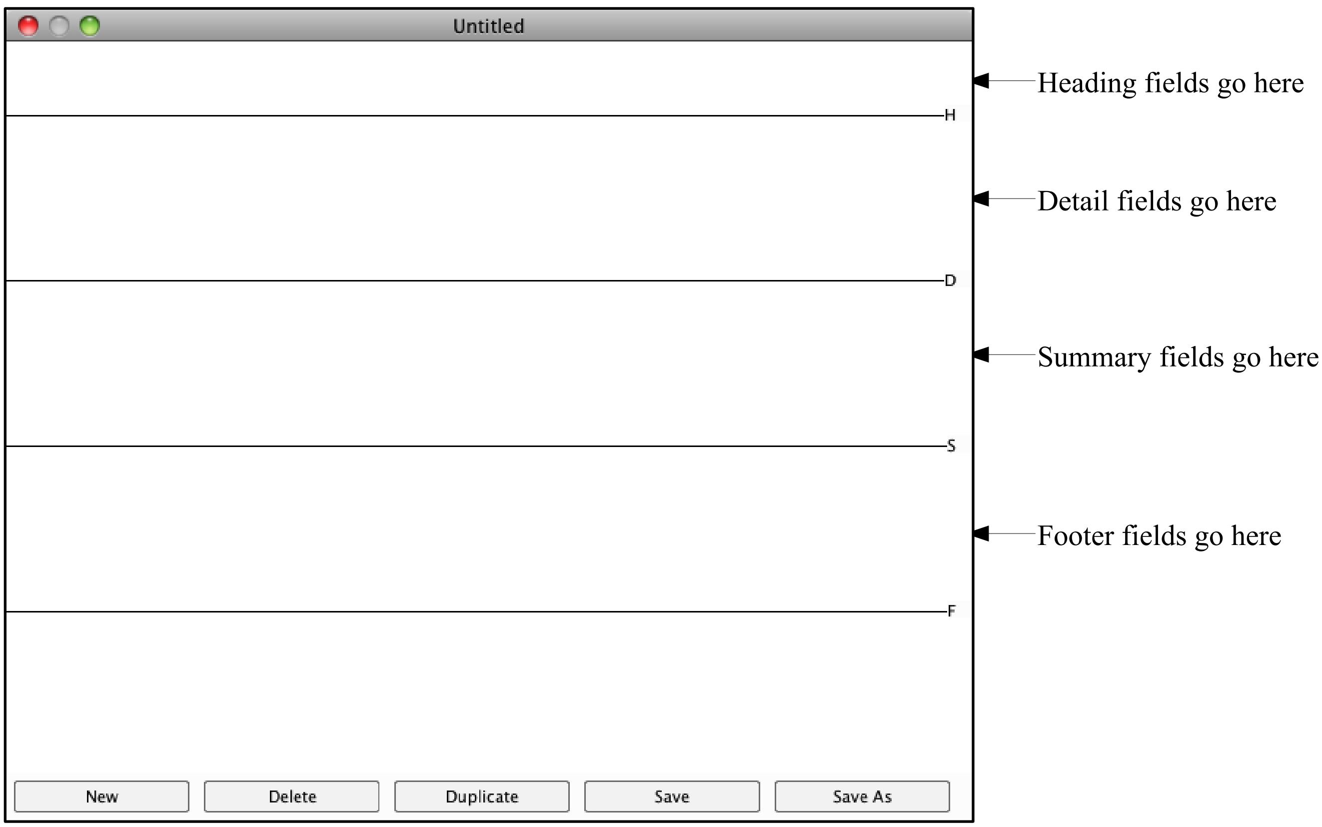
A layout tells Sumac how to draw information on a page. In Sumac, layouts:

- define the define the format and content of labels, envelopes, and name tags
- define how TICKET ORDERS and tickets print (requires Sumac Ticketing module)

You decide how you want the header, detail, summary, and footer sections of the report to appear, then graphically draw them and save them in a layout file. You then use the layout file to override the standard formatting and fields normally produced in standard reports.

Opening the Layout Dialog

In the Sumac Console, choose Utilities/Template/Custom Layout. You are presented with a dialog for choosing a file. If you choose an existing layout file, then Sumac opens it. If you cancel the file selection dialog, then Sumac creates a new layout file that looks like this:



A layout is split into four sections that determine the appearance of the report:

Header (H)	Typically holds titles, names, dates, page numbers, and column headings.
Detail (D)	The information about each item in a report.
Summary (S)	The totals and other summary information, normally appearing at the end of a complete report.
Footer (F)	Constant titles, dates, and page numbers to appear at the bottom of each page.

Each section of the layout is delineated by separator lines which you can use to adjust the printed height of each section by dragging the line up or down.

Special Buttons

The Layout Dialog has these special buttons:

New	create a new layout element
Delete	delete all the selected layout elements
Duplicate	duplicate one selected layout element
Save	save the layout into its file
Save As	save the layout into a new file

Editing Operations

Mouse Commands

Click	to select a single layout element.
Shift click	to select a group of layout elements.
Control click	to select and de-select single layout elements.
Drag	to move one layout element to another position.
Shift drag	to move a group of selected layout elements.

Keyboard Commands

Arrow keys move selected layout elements one pixel at a time. Holding down the Ctrl key and then pressing an arrow key allows you to move the selected layout elements ten pixels at a time.

Drag the handles that appear on the sides and corners of a layout element in order to change its size.

Layout Elements

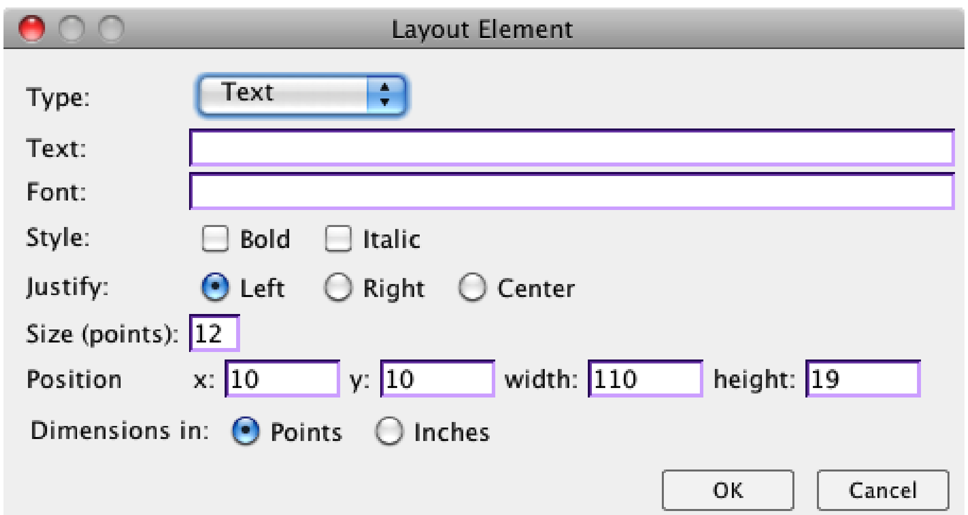
A layout consists of several layout elements, positioned appropriately, which define the format of a report. Each layout element can represent:

constant text	Text that does not vary – perhaps a title or message.
variable text	Text that changes from one detail line to another. The text comes from a variable name – the same variable names that are used in formulas in document templates.

a rectangle	Rectangle elements are a graphical feature. If you want certain parts of your report to have borders, you can size a rectangle element to encompass another element (e.g. the report totals) or group of elements.
a line	Use line elements to draw a line, either vertically or horizontally in your report. They are useful for dividing sections horizontally, or vertically. They can also be used to separate columns (vertically).
picture	If you define an element in your layout of type picture, then it will insert the picture from the contact's record (if there is one). This is usually used to print ID cards or membership cards.

Editing Layout Elements

Click the New button to create a layout element. Sumac positions a new layout element in the top left corner, and opens this dialog for editing it:



Data Type

Choose the Type of the layout element. Depending on the Type chosen, you should specify other information:

Text	Text layout elements are fixed pieces of text that you put into a report. They appear in the report exactly as you specify them in the Text field in the Layout Element dialog. In the Text field, enter the text that you want to appear in the report.
Field	Field layout elements are the link between the report and all the data in the Sumac database. In the Text field, enter the name of the variable that you want to appear in the report. These can be found in drop-down menus in Sumac's Mail Merge Codes window (click Utilities/Template/Mail Merge Codes in the Sumac Console).
Rectangle	This type of layout element draws a rectangle around its boundaries.

Line	A Line layout element draws a line in the report. The line appears along the left edge (for a vertical line) or the top edge (for a horizontal line) of the rectangular field. If the width of the layout element is greater than its height, then Sumac draws a horizontal line, otherwise it draws a vertical line.
Picture	In the Text field, specify the variable that holds the desired picture. At present, this is supported for printing contact's pictures on membership or identity cards, so the only allowed variable is *c_picture*. Sumac automatically resizes the picture to fit the dimensions you specify for this layout element.

Font

You may leave the font name field empty, in which case Sumac uses the default serif font on the computer it is running on – usually a variant of Times.

Alternatively, enter the name of the font. Note that font names are specific to the computer that Sumac is running on: only fonts that are installed on the computer can be used. If you specify a font that is not available on the specific computer, then an alternate font (usually a variant of Helvetica) is used.

You can also specify the style, justification, and size of the font.

> Hint: font settings are only used for Text and Field elements, not for Rectangle and Line elements.

Position

For all types of layout elements, to get more precise control than can be achieved by mouse operations, you can specify the position and size of the layout element by typing directly into the four numeric Position fields for the layout element. The graphical system used has (x,y) coordinate (0,0) in the top left corner; x increases to the right, and y increases going down. The units of the Position numbers are points or inches, depending on which radio button you choose.

Membership Card Layouts

When preparing a layout to be used for formatting a membership card, you should move the H line to the very top of the layout, so that the heading area is eliminated. Then all fields to be printed should be placed in the detail section of the layout.

Header (H)	Not used. Make it zero height by moving the H line to the top of the layout.
Detail (D)	The layout of the card.
Summary (S)	Not used. Make it zero height by moving the S line up to the D line.
Footer (F)	Not used. Make it zero height by moving the F line up to the D and S lines.

Ticket Layouts

Commands that print TICKET ORDERS ask the user to choose a layout for formatting the tickets being printed. Here is how the fields in the layout are used

Header (H)	Space at the top of the page. Items in this area of the layout are not printed, but the height of the header section determines the amount of unused space at the top of each page of tickets.
Detail (D)	What to print for the header on each ticket order.
Summary (S)	What to print for each ticket in an order.
Footer (F)	Space to add after each detail or summary line. Items in this area of the layout are not printed, but the height of the footer section is added after each detail and summary line.

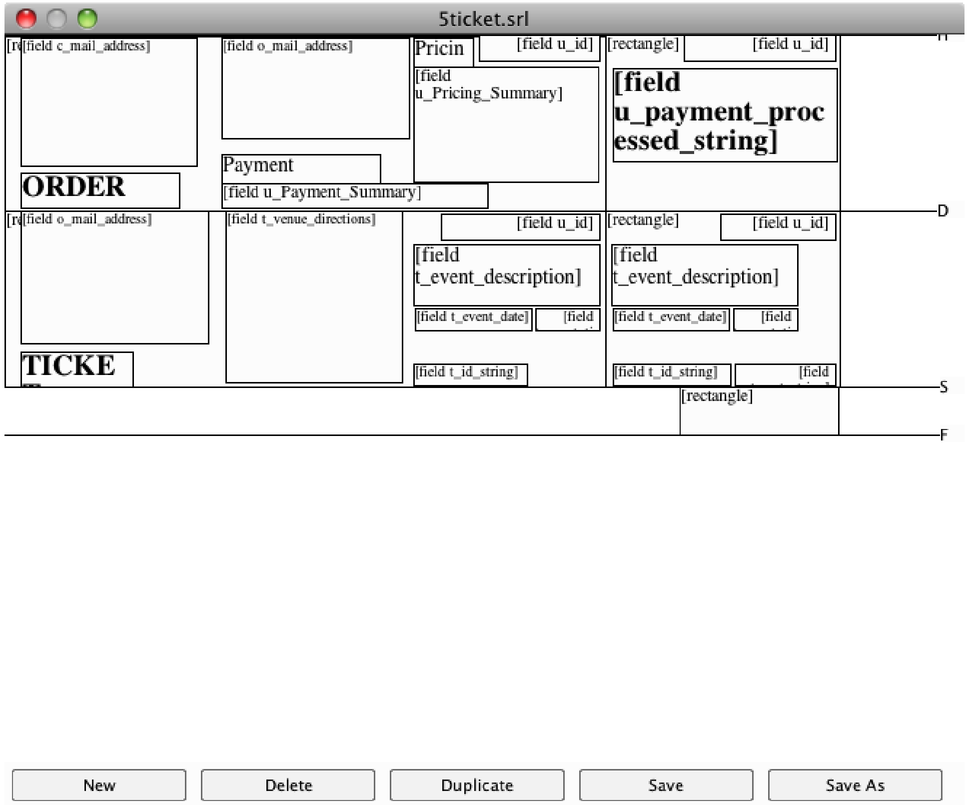
Ticket Order fields available in the D section of the layout:

u_ID
u_Contact_ID
u_Contact_Name
u_Contact_Last_Name
u_Contact_First_Name
u_Source_ID
u_Source_Name
u_When_Ordered
u_When_Printed
u_User_Who_Entered
u_Amount_Tickets
u_Tax0_ID
u_Tax0_Name
u_Tax0_Amount
u_Tax1_ID
u_Tax1_Name
u_Tax1_Amount
u_Tax2_ID
u_Tax2_Name
u_Tax2_Amount
u_Tax3_ID
u_Tax3_Name
u_Tax3_Amount
u_Tax4_ID
u_Tax4_Name
u_Tax4_Amount
u_Tax5_ID
u_Tax5_Name
u_Tax5_Amount
u_AdjustReason
u_Amount_Adjust
u_Amount_Total
u_DeliveryMethodID
u_DeliveryMethodName
u_PaymentTypeID
u_PaymentTypeName
u_CC_Type_ID
u_CC_Type_Name
u_CC_Number
u_CC_Expiry_Month
u_CC_Expiry_Year
u_CC_Security_Number
u_CC_Name
u_CC_Authorization_Code
u_Pricing_Summary
u_Payment_Summary
u_Payment_Processed
u_Payment_Processed_String
u_EventNames
u_Notes
u_HouseNotes

Ticket fields available in the S section of the layout:

t_Event_ID
t_Seatblock_ID
t_Seat_Index
t_Ticket_Discount_ID
t_Ticket_Discount_Name
t_Order_ID
t_Used
t_Hold
t_Price
t_Seat_String
t_ID_String
t_Venue_Directions
t_Event_Description
t_Event_Name
t_Event_Date
t_Event_Day_Of_Week
t_Event_Time

Here is a sample of a layout that is used to print tickets on forms that have five tickets per page and a tear-off on the right hand side.



Mail Merge

Introduction

You often want to send a document to many CONTACTS. The document may be a:

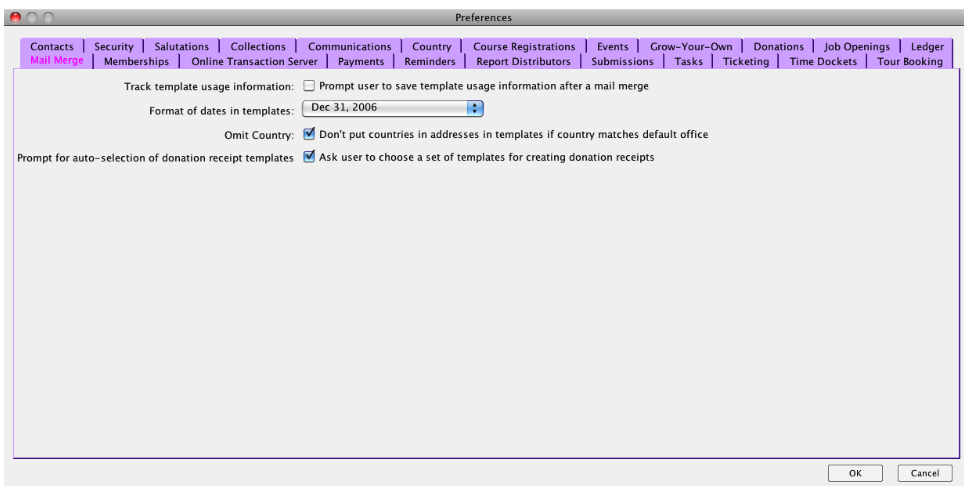
- letter
- invitation
- receipt
- thank-you note, or
- any other type of document.

If you are going to send an exactly identical document to every CONTACT, then you do not need to do a Mail Merge operation to create the documents. You can use Sumac to print mailing labels or envelopes (see *Labels, Envelopes, and Name Tags* on page 469), which is very helpful in such a mailing.

However, if you want a different document for each CONTACT – perhaps receipts with different amounts, letters with different mailing addresses, or thank-you notes that adjust their text to accommodate different levels of giving – then you need to do a Mail Merge operation to create the personalized documents.

Notes for the Sumac Administrator

The Utilities/Customize Database/Preferences command in the Sumac console contains options that affect Mail Merge operations. Click the Mail Merge tab in the Preferences dialog, then set up options appropriately.



Track Template Usage

Click this check box if you want to track template usage. If this feature is turned on, then Sumac prompts a user each time a template is used, asking if usage information should be saved.

The Utilities/Template/Template Usages command allows you to see and manage the template usage information.

Format Of Dates In Templates

By default, Sumac puts dates into merged documents in ISO standard format (yyyy-mm-dd). If you want to use a different format, choose the desired format from this drop-down menu.

Omit Country

When Sumac generates mailing addresses in mailing labels or envelopes, and in merged documents produced from document templates, the mailing address may be something like this:

Jane Doe
123 Main Street
Toronto, ON
Canada

If the mail is being generated and mailed from within Canada, you may want to omit the country, since it is unnecessary clutter in letters and mailing labels.

Click this check box to tell Sumac that if an address being generated has the same country as the default office, then the country should be omitted from the mailing address.

Receipt Donation Templates

Templates for DONATION receipts can be organized into sets. If this option is turned on, then when a user generates DONATION receipts, she is asked to choose a set of templates. Sumac can automatically choose the most appropriate template from a set.

Choose the Recipients

The first step in generating documents is to choose the recipients of the documents.

If you are working with the CONTACTS list, you can use its many searching techniques (see *Searching* on page 84) to produce a list of the desired recipient CONTACTS, then click the Mail Merge button.

There are many other lists that allow you to indirectly choose CONTACTS, then perform a Mail Merge. Here are the lists that allow this:

- AUCTIONS
- BIDS
- CAMPAIGNS
- DONATIONS (both the Mail Merge and the Make Receipts buttons do mail merge operations)
- DO-IT-YOURSELF
- JOB OPENINGS
- MEMBERSHIPS
- PLEDGES
- PROPOSALS
- REMINDERS
- SUBMISSIONS.

Indirect selection of CONTACTS works by choosing items in a list which are related to a CONTACT. For example: if you select a PLEDGE and click the Mail Merge button in the PLEDGES list, Sumac chooses the CONTACT who made the PLEDGE; if you select a DONATION in the DONATIONS list, Sumac chooses the CONTACT who made the DONATION.

Start the Merge

In most list windows, Sumac has two command options for running a mail merge; quick mail merge, and mail merge. See the descriptions below to choose the best option for your operation.

Quick Mail Merge

The Quick Mail Merge command expects only one incoming template, and creates one output file. Sumac asks you to specify a location to save the file then prompts you to create a communication record. When the merge is complete, Sumac opens the output file in your default document editor. Quick mail merge is available in the following list windows:

Collection objects	Grant Applications	Proposals
Payments	Invoices	Reminders
Campaigns	Job Openings	Sales
Contacts	Look-up lists	Submissions
Grow Your Own	Lots	Tour Booking involved contacts
Forms	Payment Batches	
Fund Requests & Programs	Pledges	Ticket orders
	Products	

Mail Merge

For situations where you need to better define your mailing, it is recommended to use this full mail merge command. The options available through this command are: output document control, encryption, multilingual template specification, and mail merge grouping by variables. Once you have chosen the records to use in the merge, whether directly in the CONTACTS list, or indirectly in another list, click the Mail Merge button. Depending on the items showing in the list, and whether any are selected, you may receive a dialog asking if you want to create documents for all or just the selected entries in the list.

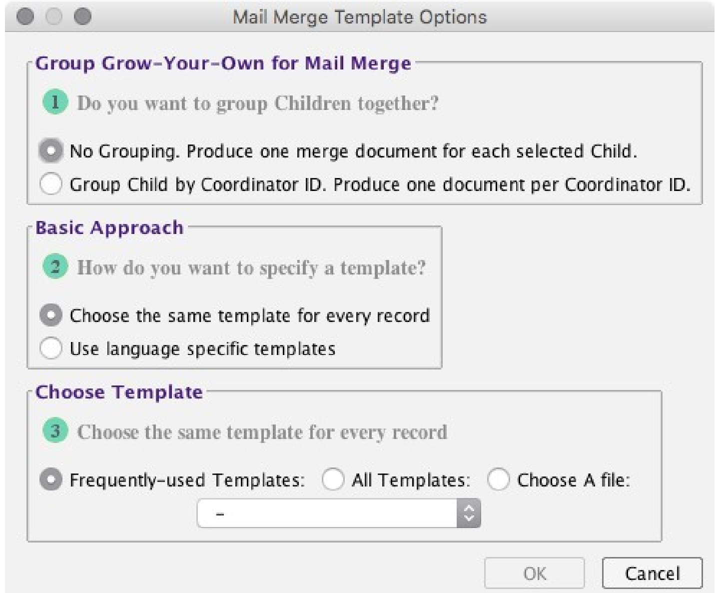
Choose Templates

What is a Template?

A document template is a file that contains the document you want to produce for each CONTACT, but wherever data about a particular CONTACT (or DONATION, or SUBMISSION, etc.) is to be put into the document, a document template has blanks that indicate what data should be inserted. To learn how to create document templates, see *Create Document Templates* on page 499.

New Style

Most Sumac mail merge operations present a window that lets you choose all relevant input options: whether records should be grouped, which templates to use, where they are stored, language-specific templates. Here is a sample of what the window may look like doing a mail merge operation on records of type “Child” with a contact field “Coordinator”.

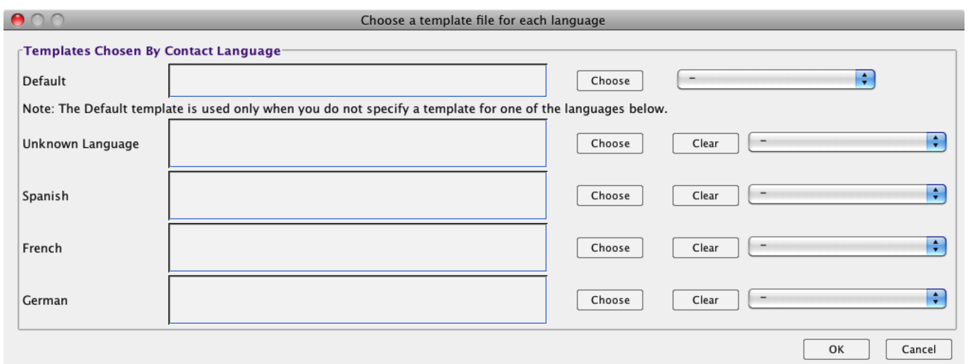


Old Style

Some mail merge operations still use older windows to solicit your inputs. The sequence of prompts may go something like this:

Next you are asked to choose which document templates should be used to generate the documents.

When you choose document templates, you have the option of choosing a specific file to be used for each language spoken by the CONTACTS who are going to receive a document. For example, if you have selected CONTACTS who speak English, French, German, and Spanish, and some CONTACTS whose language we do not know, the dialog for choosing the document templates looks like this:



Make sure that you choose a document template for each language:

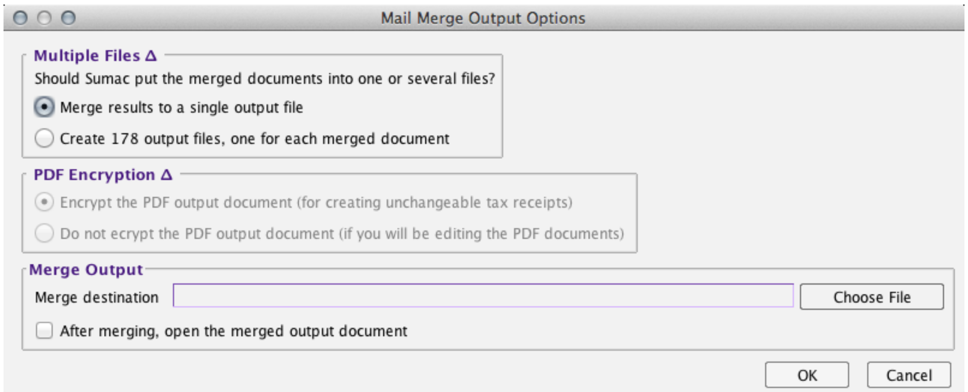
- You may specify a different document template for each language, including the Unknown Language.
- If you do not choose a document template for one or more languages, then you must specify a Default document template, which is used to generate documents for those CONTACTS whose language does not have a specific template.
- If you have only one document template, and are not concerned about language-specific documents, then you can choose only a Default template, and it is used for all languages.

Note, that all the document templates must be the same type of file. A document template may be a text, RTF, DOCX, or HTML file. But all of the ones you choose in this dialog must be the same type.

When you have specified all the templates, click OK.

Specify Type of Output

After you click the Mail Merge button, and answer any possible questions regarding all or only the selected entries, this dialog appears:



If you are doing a Merge operation to create documents for, say, 20 CONTACTS, you have the option of putting all the entries into one output file, or creating 20 separate files.

If you only intend to print the documents, then putting them all into one big file is most convenient. If, however, you may want to edit individual letters, or you are generating receipts and want each receipt kept separate from the others, then you may want to create a different file for each CONTACT.

If the merge operation you are performing will result in 20,000 pages of text (perhaps a two-page letter for each of 10,000 CONTACTS), beware that some word processors are unable to process such large documents. If you send all merged documents to a single output file, you may not be able to open the output file with your word processor.

If your template was a PDF file, then you have the option of encrypting the generated output documents. These option buttons are disabled (as in the above picture) when you use templates that are not PDF documents.

Specify where the generated output document(s) should be put. If you are creating one output file, you are asked to specify its name and location; if you are creating several files, you are asked to specify a folder to hold it.

If you are producing only one output file, then you have the option of getting Sumac to automatically open it for you when the mail merge operation is completed.

Make your choice, then click OK.

Choose Directory To Hold Report Files

Next, you are asked where to store the resulting documents that Sumac creates for you. There are two possibilities:

- If mail merge is producing a single file, you are presented with a standard file dialog asking where to save the file and what to name it.
- If mail merge is producing several documents, then it presents a file dialog to enable you to choose a folder to hold the output documents. Often it is

most appropriate to create a new folder for each batch of merge documents you produce. Give the folder a suitable descriptive name (e.g. R*eceipts, 2006-08*).

Once you specify the directory to hold the output documents, Sumac proceeds to generate all the documents.

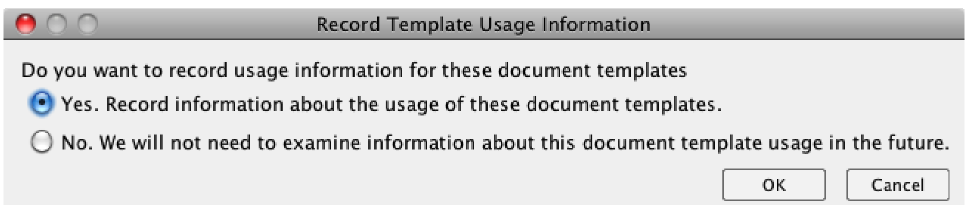
Save Communication Records

After all the output documents have been saved, you are asked if you want to save a communication record for each contact for whom you generated a document. If you click Yes, then you are presented with the standard window for entering a communication record. You cannot specify a contact, but should specify all other appropriate information for the communication, and click OK to have communication records saved, one for each contact.

If you do a mail merge and ask Sumac to create communication records, it will automatically fill in the Event in the communication records, using the event defined in the source records (if there is one). For example, if you mail merge a list of donations, the communication records will refer to the same event as the donations. If you choose a specific event in the communication record that you fill out, then this event will over-ride any event in the source records.

Remember What Was Done

After you choose a directory to hold the resulting merged documents, Sumac may ask if you want to record information about the document templates that you just used:



If you click Yes, to save the document template usage information, then Sumac records the use of the templates in a separate template usages list.

If later you wish to review the template usage information, choose Utilities/Template/Template Usages in the Sumac Console. You can search and sort this information like any other list.

> Hint: Only a user with administrative privileges is allowed to delete template usage information.

Search Builder

Overview

Search Builder allows you to graphically construct searches. The searches are built from individual search criteria. The search criteria can be connected together to build more complex searches.

These searches can be used in several ways:

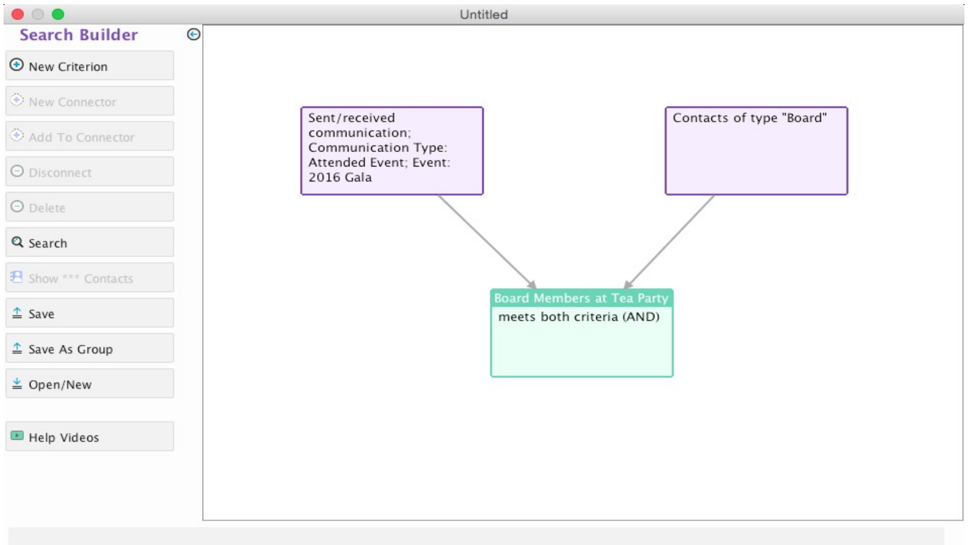
- The CONTACTS list has a Search Builder button. This button lets you create searches, save them to files, load them from files, and perform the searches to see the resulting list of CONTACTS.
- The Sumac Administrator can define searches and save them as files, which can be distributed to all Sumac users. Alternatively, and often more conveniently, a search can be saved into the Sumac database as a group. Any user can then do a Group search in the CONTACTS list, and show all the CONTACTS who are in the group, based on the search criteria. This is a quick way to provide pre-built versions of oft-repeated searches like: all our board members, all CONTACTS who donated last year, or all CONTACTS who attended a particular event.
- CAMPAIGNS need to segment the list of CONTACTS so that different COMMUNICATIONS can be sent to different subsets of the list of CONTACTS. Each CAMPAIGN can identify its CONTACTS by identifying a pre-built group, or alternatively by creating a search specific to that CAMPAIGN.

Open Search Builder

You can get a Search Builder window in one of these ways:

- Click the Search Builder button in the CONTACTS list. If you are experimenting and constructing a search, this is often the best way, because you can immediately perform the search and see the results in the CONTACTS list itself.
- In the Groups list window, click the New button, or double-click to edit an existing group. Then click the Search Builder button in the group editing dialog.
- In the CAMPAIGNS list window, click the New button, or double-click to edit an existing CAMPAIGN. Then click the Custom Group radio button, and click the Search Builder button.

A Search Builder window looks like this:

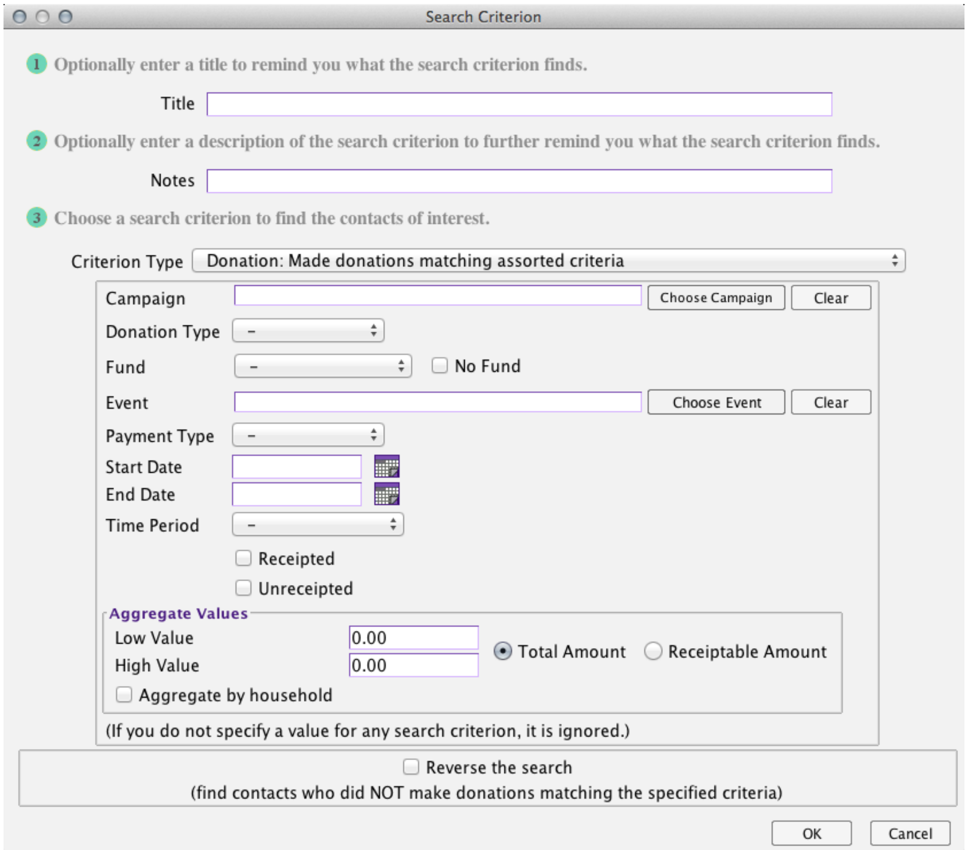


Buttons In Search Builder

The buttons in the preceding Search Builder dialog picture are the ones that you see if you opened the Search Builder from the CONTACTS list dialog. Depending on what you clicked to open the Search Builder window, different combinations of buttons appear. Here is a description of each button:

New Criterion Button

Create a new search criterion. When you click this button, a dialog appears for specifying a search criterion:



The drop-down menu at the top of the window enables you to specify the type of search to be performed. The types are described in the table below.

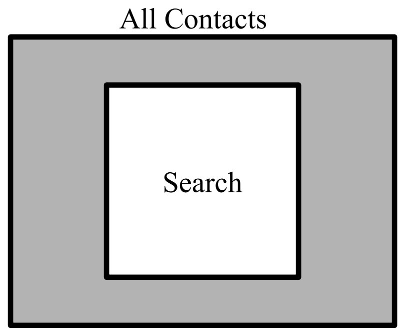
You can specify a *Title* for the search box. This title appears at the top of the box that displays the search criterion.

You can also specify *Notes* for the search box. This enables you to provide a description so that when you use the search later, you will recall exactly what group of contacts is represented by each box in the search.

Depending on the type of search chosen, the search type drop-down menu is followed by fields or menus for specifying the details of the chosen type of search. For example, the search type chosen in the picture above is *Donation; Made a donation matching assorted criteria*, so there are several fields for specifying the desired DONATION records.

Finally, each type of search can be negated – you can specify that the results of the search should be all the CONTACTS who were *not* found by the specified search. For instance, you could choose a type of search that identifies all the CONTACTS who attended an event, then negate it, causing it to find all the CONTACTS who did not attend the event.

This diagram shows the impact of negating a search:



In the diagram, the outer box depicts all the CONTACTS in the database. The search finds those CONTACTS depicted by the inner box. The CONTACTS found by the negated search are those in the grey area.

Here are the types of searches available in Search Builder:

Search Type	*Extra Information To Specify*	*Which Contacts It Finds*
All contacts	None.	All the CONTACTS in the Sumac database.
Contact type	The CONTACT type to find.	CONTACTS who have the specified CONTACT type clicked in their CONTACT record.
Contact details	The field. The relationship (e.g. equals, less than) of the field to a specific value. The specific value to search for.	CONTACTS whose records in the Sumac database matches the specified field search.
Contact age range	The low and high ages of interest.	CONTACTS whose ages falls in the specified range.
Contacts whose IDs are in an IDs file	The tab-delimited text file that holds CONTACT IDs in its first column.	CONTACTS whose IDs are in the first column of a tab-delimited text file.
Contact who is a member of a household	None.	Any CONTACT who has the "member of a household" relationship to another CONTACT.
Contact fact: Education	The school.	CONTACTS for which a fact indicates the specified school.
Contact fact: Club	The name or type of club.	CONTACTS for which a fact indicates the specified type of club.
Contact fact: Program Interest	The program interest.	CONTACTS for which a fact that indicates the specified program.
Contact fact: Employment	The organization name or industry.	CONTACTS with employment facts that match the search criteria.

Search Type	*Extra Information To Specify*	*Which Contacts It Finds*
Contact fact: Award	The name or date of the award.	CONTACTS with award facts that match the search criteria.
Contact fact: Preferred Task	The type of task.	CONTACTS with a preference for the specified type of task.
Contact fact: Known Planned Gift	Amount of gift.	CONTACTS with known planned gifts of at least the specified amount.
Contact fact: Skill	A skill or qualification.	CONTACTS with the specific skill or qualification. You can also specify ranges of dates for both the *when checked* and *next validation* fields in skill facts.
Contact fact: Availability	Start and End times, and days of week.	Those who are available in the specified times.
Contact: No Email Address	None.	Contacts that have no email address in the residence or business tabs.
Contact: No Postal Address	None.	Contacts that have no street A address in the residence or business tabs.
Communication: Preference	The COMMUNICATION type that the CONTACTS wish to receive.	Those who have the specified Communication type clicked in their CONTACT record.
Communication: Contact sent/received a communication matching assorted criteria	Specify information about the communications of interest: fund, communication type, event, source code, start and end date, time period, the minimum and maximum number of communications that must have been sent or received.	Contacts with whom there has been communication with the specified characteristics.
Communication: Communication Content Preference	The preferred content.	CONTACTS for which you have specified a fact that indicates the specified content.
Communication: Communication Medium Preference	The medium.	CONTACTS for which you have specified a fact that indicates the specified medium.

Search Type	*Extra Information To Specify*	*Which Contacts It Finds*
Course Registration: Contact registrations match assorted criteria	Specify information about the course registrations of interest: contact type, session, course, session start and end dates, amount of registrations, amount of distinct teachers, and final status.	CONTACTS who have a REGISTRATION matching the specified criteria
Donation: Made a donation matching assorted criteria	Specify information about the donations of interest: campaign, donation type, event, fund, payment type, start and end date, time period, low value, high value, and whether the donations were receipted or not. The high and low values can be drawn from the total or the receiptable fields. You are also able to search based on the date of last donation, amount of last donation and total number of donations.	CONTACTS who have made DONATIONS matching the specified criteria.
Donation: Made a donation in a date range	The start of the date range. The end of the date range.	CONTACTS who made a DONATION on or after the first date and on or before the last date.
Donation: Made first donation in a date range	The start of the date range. The end of the date range.	CONTACTS who made a DONATION on or after the first date and on or before the last date, and the DONATION is the first one that the CONTACT has ever made.
Membership: Contact has ever had a membership	The type of membership.	CONTACTS who have ever had a MEMBERSHIP of the specified type.
Membership: Contact's first membership was in a specified date range	The start of the date range. The end of the date range.	CONTACTS whose earliest membership start date is in the specified date range.

Search Type	*Extra Information To Specify*	*Which Contacts It Finds*
Membership: Contact has a current membership on a specified date	The date on which the MEMBERSHIP should be current. Whether to add grace days to the specified date. The type of MEMBERSHIP of interest. Whether you are interested in renewed or not renewed memberships.	CONTACTS (either the member or the billing contact) who have a MEMBERSHIP of the specified type on the specified date. Note that if you do not specify a date, then the current date is used.
Membership: Contact has a membership matching assorted criteria	The date range on which the MEMBERSHIP should be current. The type of MEMBERSHIP of interest. Whether you are interested in renewed or not renewed memberships. You are also able to search based on payment type, expiry date range, source, or gift membership.	CONTACTS (either the member or the billing contact) who have a MEMBERSHIP of the specified type on the specified date range. Note that if you do not specify a date, then the current date is used.
Pledge matching assorted criteria	Specify information about the pledges of interest: total amount, dates, campaign or event, commitment date, pledge status, date of first payment, and recurring payment amount.	There is a PLEDGE in effect for the CONTACT matching the assorted criteria.
Volunteer Type	The volunteer type.	CONTACTS of the specified volunteer type.
Search Builder Group	The group.	All the CONTACTS who match the search criteria in the group.

Search Type	*Extra Information To Specify*	*Which Contacts It Finds*
Lots: matching assorted criteria	The auction, medium, auction category, unsold disposition, low and high bids, low and high percentages to donor, low and high sold price. You must also specify which contacts Sumac should find: donors, artists, or buyers.	CONTACTS of the specified type (donor, artist, or buyer) in auction lots that meet the specified criteria.
Lots: bought lots in a range of values in a specific auction	The auction, and the range of values for the lots.	All CONTACTS who bought a lot in the specified auction with a value in the specified range.
Sales	Start and end date, product, delivery method, whether the sale has been paid.	CONTACTS who bought something recorded by a sale that matches the specified criteria.
Tasks	Specify which contacts are of interest in the task records. Specify the date range, program and assignment status of the tasks of interest.	CONTACTS who are in the specified contact field in task records that match the specified search criteria. Search tasks by date, status, and program. Choose which contact field is of interest.
Ticket Orders	The event of interest, and the order dates of interest.	CONTACTS who placed ticket orders for the specified event and in the specified date range.
Time Dockets	Specify the date range of interest, which program is of interest, activity type and the maximum or minimum number of hours worked	CONTACTS with time dockets satisfying the specified search criteria.
Invoices	Specify a variety of search criteria.	CONTACTS with invoices satisfying the specified search criteria.
Payments	Specify a variety of search criteria.	CONTACTS with payments satisfying the specified search criteria.
Grant Applications	Search by type of application, application status, and submission date.	CONTACTS with grant applications that satisfying the specified search criteria.
Programs	Specify a variety of search criteria.	CONTACTS with tour booking programs that satisfy the specified search criteria.

Search Type	*Extra Information To Specify*	*Which Contacts It Finds*
Reminders	Specify a variety of search criteria.	Contacts with reminders that satisfy the specified search criteria.
Grow Your Own and Case records	Specify field search criteria that the grow-your-own records must satisfy. You must also specify which contacts Sumac should find, choosing from a drop-down menu of the contact fields in the grow-your-own records.	Contacts of the specified type in grow-your-own records that meet the specified criteria.

Add to Connector

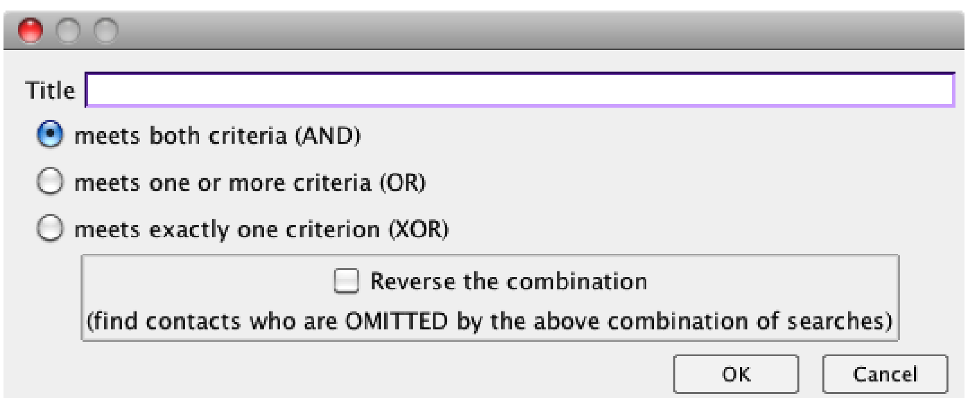
Click to select a criterion and a connector. Then use this command to connect them.

Disconnect

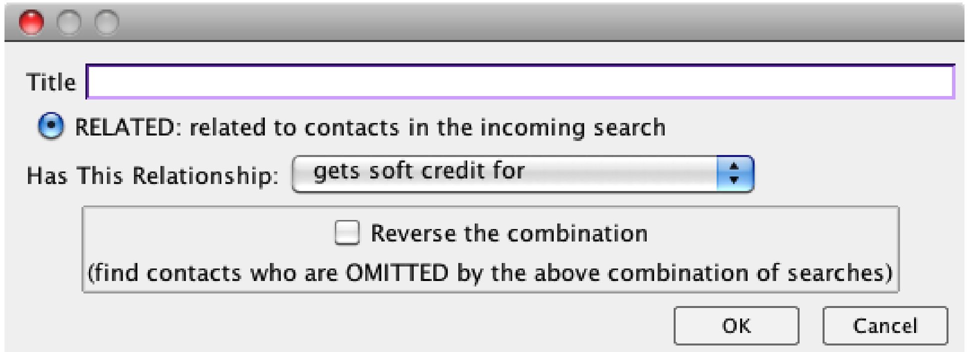
Select a search criterion and a connector that it is attached to. Then use this command to disconnect them.

New Connector Button

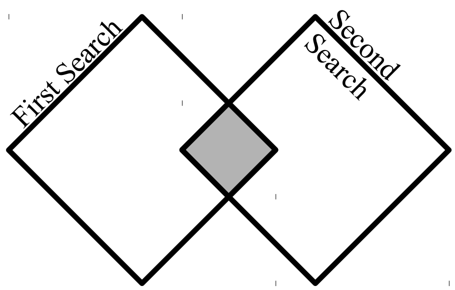
You must click to select the searches that you want to connect, then click the New Connector button. This button displays the following dialog to ask you what kind of connection is to be made. If more than one search is selected, then the first form of the connector dialog appears.



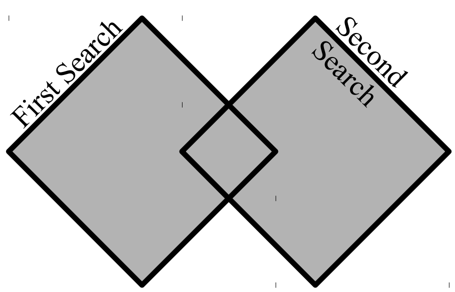
If exactly one search is selected, then this second form of the connector dialog appears.



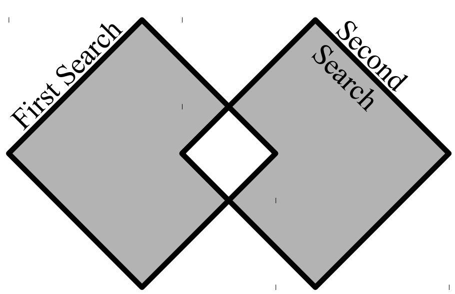
AND A CONTACT is in this list if it is in *all* the search criteria pointing into the AND box.



OR A CONTACT is in this list if it is in *at least one* of the search criteria pointing into the OR box



XOR XOR stands for exclusive-or. A CONTACT is in this list if it is in at *exactly one* of the search criteria pointing into the XOR box



RELATED This type of connector connects to only one other incoming box. Unlike the other types of connector boxes, it requires you to specify additional information: the type of relationship you want to search for.

The RELATED connector finds the CONTACTS who have a specified type of relation to any CONTACT identified by the incoming box.

Reversing Connectors

Note that you can reverse (negate) the results found by connector boxes. This causes Sumac to find all except the contacts who are identified by the combination of searches represented by the connector.

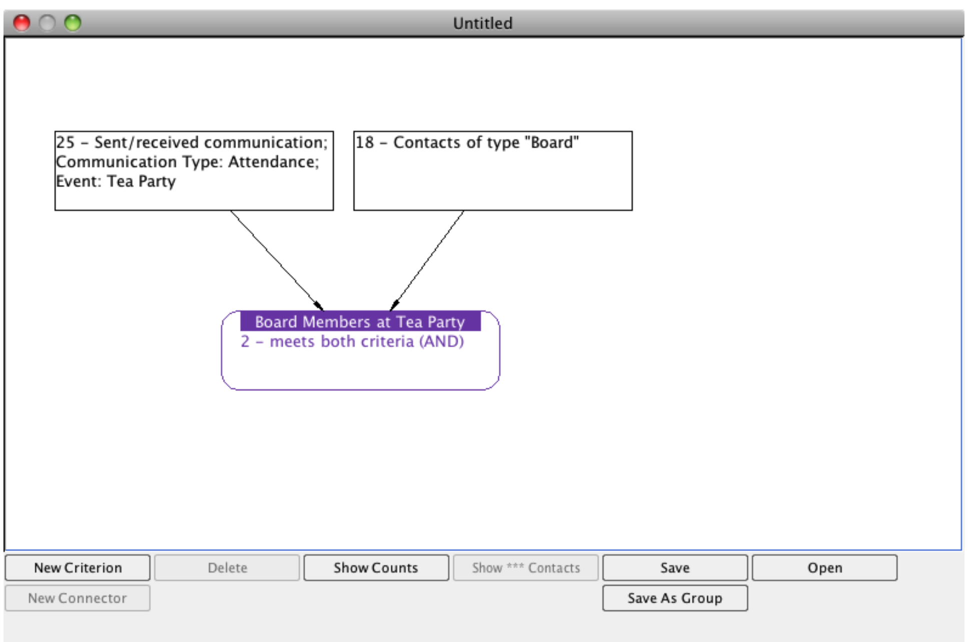
For example, if you have two search criteria that find contacts who attended events A and B respectively, you can combine them with an OR connector box to find everyone who attended either event A or event B or both. If you then reverse the connector box, it will find all those people who did not attend either event A or B.

Delete Button

Click to select one or more boxes that you want to remove, then click the Delete button. The selected boxes are removed.

Show Counts Button

This button performs the searches specified by all the search criterion boxes, and also performs the logical combinations. The number of CONTACTS found by each search criterion is displayed at the start of the text in the box, like this:

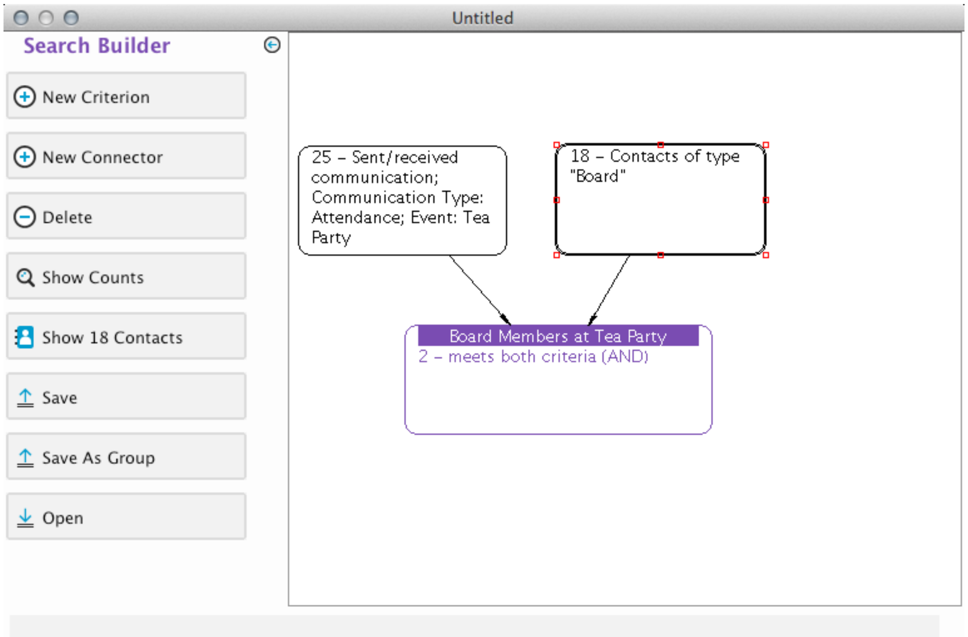


The CONTACT type search found 20 CONTACTS, the attendance search found 28 CONTACTS, and the AND relationship between them found two CONTACTS (i.e. there are two CONTACTS who matched both of the search criteria).

*Show *** Contacts Button*

This button is only present if the Search Builder window was displayed from the CONTACTS list.

When you click to select a single search criterion, the Show ?? Contacts button changes its name to indicate the number of CONTACTS that will be shown. For example:

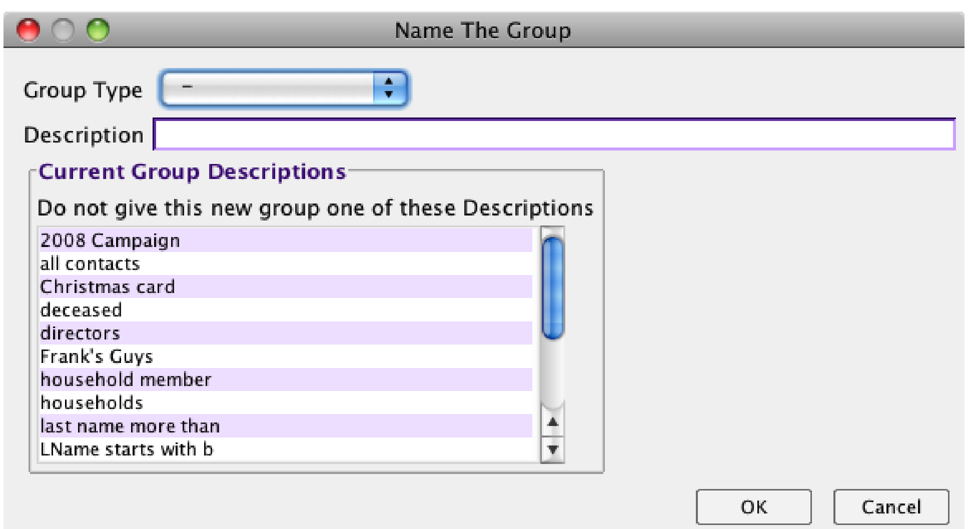


When you click this button, the Search Builder window goes away and the CONTACTS list appears showing the CONTACTS identified by the selected search criterion box.

Save As Group Button

This button is only present if the user has administrator privileges.

When you click this button, you are asked to give the group a name and a group type, then it is saved to the database and becomes available to all users.



Note that a search can only be made into a group if it has exactly one box that is not used as an input to any other box. Another way to state this, is that it must be possible to identify one final result for the search. For example, the search in the picture above could be saved as a group because there is one final result (the CONTACTS identified by the AND connector box). The following search cannot be saved as a group because it is unclear whether the search is intended to find the CONTACTS from the AND connector box, or those from the PLEDGE search box.

Save Button

Save the search criteria into a file. This file will be given a suffix *ssc*.

> Hint: On your computer's desktop, if you double click to open a file that holds saved Search Builder criteria (a .ssc file), Sumac runs, lets you log in, and then opens the contacts list and the Search Builder window to show the file that was double clicked. This is a quick way to get a list of contacts specified by a search.

Open Button

When you click this button, you are given the option of opening a file that holds a previously saved search. Alternatively, you can create a new empty search.

OK and Cancel Buttons

These buttons are present when Search Builder was invoked while editing a group or a CAMPAIGN. OK causes the search to be saved into the group or CAMPAIGN, and Cancel causes changes to the search to be discarded.

Using The Search Builder Window

You can use these key and mouse combinations to move and edit the boxes in the Search Builder window:

click	Click in an empty area to de-select all boxes. Click a box to select only it.
double-click	Double-click a box to edit the search criterion it represents.
control-click	Control-click a box to select or de-select it individually.
arrow keys	Move the selected boxes around, one pixel at a time.
control-arrow keys	Move the selected boxes around, 10 pixels at a time.
delete key	Delete the selected boxes.
dragging	Drag to move a box around. Its connecting arrows automatically move with it.

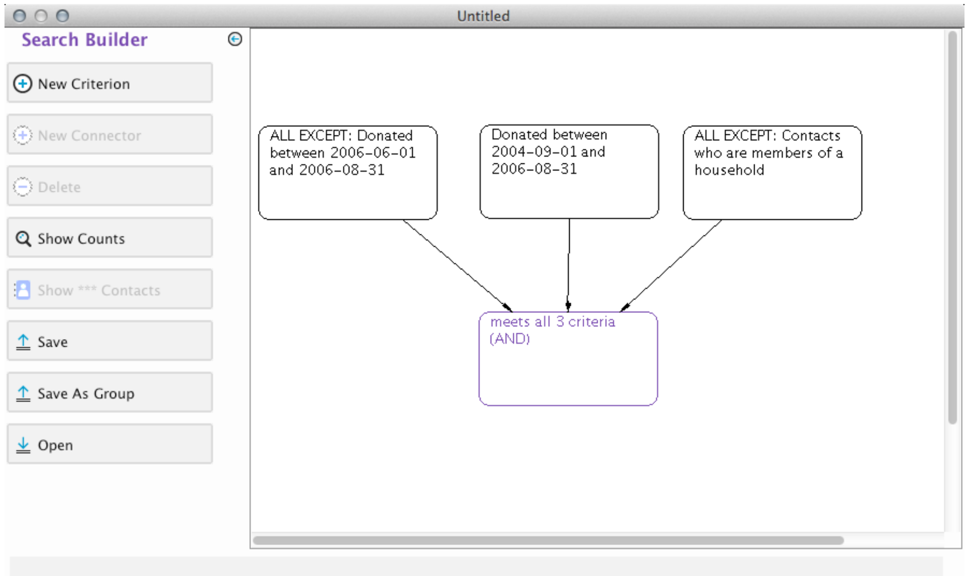
Note that a search criterion is drawn in black, and a logical combination of several searches is drawn in blue.

Building More Complex Searches – An Example

Consider how to construct a more complex search. This example finds CONTACTS to whom we want to send a solicitation on September 1, 2006. Here are the criteria for identifying these CONTACTS:

- CONTACT did *not* donate in the last three months, i.e. between June 1 and August 31,
- CONTACT *did* donate in the last two years, and
- CONTACT is *not* a member of a household.

Here is the search that finds these CONTACTS:



There are four boxes – three search criteria, and one connector. Note that the first and third search criteria find CONTACTS (those who donated in a date range, those who are members of a household), then negate the search to find everyone except the CONTACTS specified by the search criteria. The AND connector box combines all the search criteria so that it finds those who satisfy all three search criteria.

Create Document Templates

A document template is a document file. The document template contains blanks that indicate what data Sumac should find in its database and put into the document in place of the blank.

Sumac uses document templates to generate documents, inserting information into the document. This enables you to automatically generate emails, fliers, newsletters, solicitations, receipts, and any other type of document that requires customization with information from the database.

The document may be a PDF (Acrobat) document, an HTML document (useful for email), a simple text document (TXT), a word processing document (DOCX), or a Rich Text Format (RTF) document for more sophisticated formatting.

Introduction

What is a Document Template?

A document template is a document file, just like a word processing or spreadsheet document. A document template may be one of these types of documents:

- Plain Text
- Rich Text Format (RTF): a format supported by most word processor programs
- DOCX: a format supported by most word processor programs, especially Microsoft Word
- HTML
- PDF (Acrobat).

How are Document Templates Used?

Sumac uses document templates to create new documents or emails to be sent to contacts. It does this by inserting information from the Sumac database into *blanks* specified within the document template. In Sumac this operation is referred to as Mail Merge.

Here are the different document formats that can be used for different purposes:

Use Of Document Template	*Plain Text Allowed*	*PDF (Acrobat) Allowed*	*DOCX or RTF Allowed*	*HTML Allowed*	*JPEG Allowed*
generate a new document and place it in a file	yes	yes	yes	yes	yes
generate emails to send to contacts	yes	no	no	yes	yes

How are Templates Special?

The *blanks* that Sumac fills in with your data are specified by means of formulas. A formula is identified within the document template by enclosing it in double angle brackets << … >>.

When the document template is merged with information from the database, the formulas, including their surrounding angle brackets, are removed and the data they represent is put in their place.

To learn how to create a formula see *Appendix A – Formulas* on page 506.

Steps for Creating Document Templates

Here are the basic steps one follows to create a document template:

✔ Write the text: Get the text of the document. You might find it easiest to write the document template as if it is going to be sent to one particular contact, inserting the information pertaining to the contact directly into the document template.

> Hint: Beware of quote mark problems in email templates. Some word processors automatically convert typewriter quote symbols (" and ') into typographic quote marks (“ ” ‘ and ’). Typographic quotes look better. They do, however, cause problems with email. Typographic quote marks are represented using different numerical encodings on different computers. So what looks like a perfectly good quote mark on the sender’s computer may become a completely different, sometimes weird, character on the recipient’s computer. It is usually best to just use old-fashioned typewriter quote marks when creating templates for email usage or, alternatively, make sure that your template is saved using UTF-8 encoding, which seems to work universally.

> Hint: Do not use Microsoft Word to create the text in an HTML template. Word inserts non-standard HTML into documents and even Outlook, another Microsoft product, cannot always interpret it correctly. Word’s extra codes will also make the template several times larger than it needs to be. If you have created text in Word and want it in an HTML template, copy all the text out of your Word template, paste the text into a text editor that strips all the invisible formatting out of it (e.g. Notepad on Windows, TextEdit in a plain text document on Macintosh), then copy from the text editor and paste into your HTML editor.

✔ Insert formulas. There are two different ways to do this, one for PDF documents and one for all other types of documents:

- For non-PDF document templates: Replace the parts of the document that pertain to a specific contact with formulas. The detailed syntax of formulas is specified in *Appendix A – Formulas* on page 506. Sumac provides a Mail Merge Codes dialog to help you insert variables into a document, and to test them. See *Mail Merge Codes Dialog* on page 501 to learn how to use this tool.
- For PDF document templates: Create a form-filling field where the contact-specific information should be placed. Size the field appropriately. Name the field with the formula that describes the information to be inserted into the field. For example, if the contact’s name is to be placed in the field, then the name of the field should be <<*c_name*>>. You may also omit the angle brackets and Sumac will process the entire field name as a formula.

> Hint: If short pieces of text need to be adjacent to a field in a PDF template, make the text part of the field name. For example, if the text of a field should be immediately followed by a comma, then name the field <<*c_name*>>,.

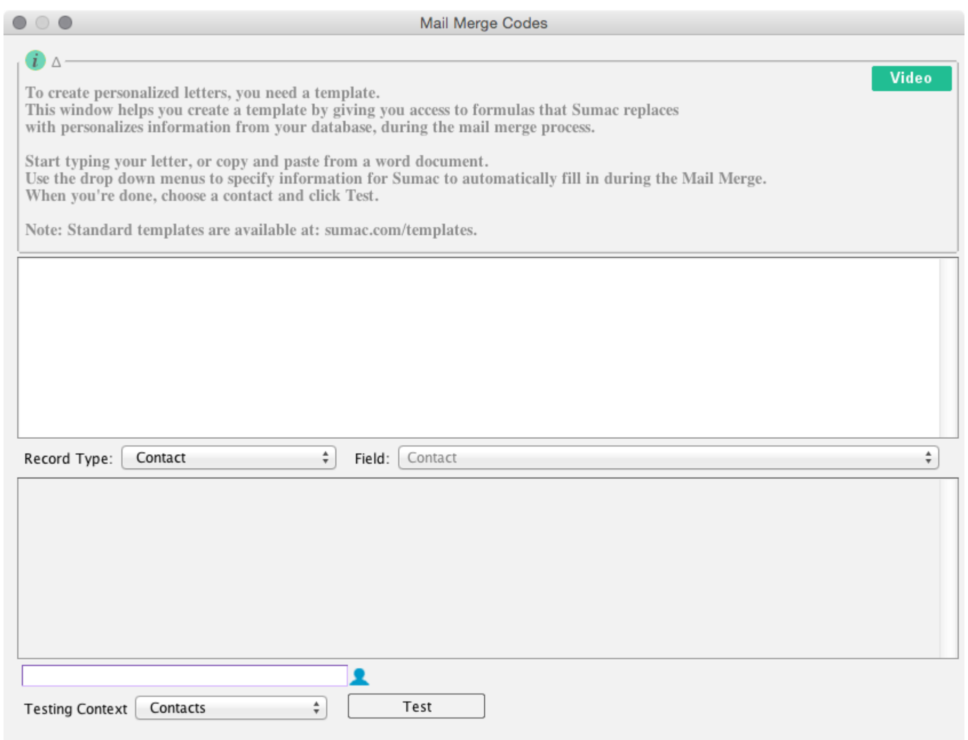
- ✔ Apply formatting: Use the text, with embedded formulas, to create the final document template. Put the text into an appropriate editing program, and format the document the way you want it to appear when delivered (printed or emailed) to a CONTACT. See suggested *Tools For Formatting Document Templates* on page 504.
- ✔ Test the document template: Run Sumac, and test the document template on appropriate data. Do Mail Merge commands from one of the CONTACTS, DONATIONS, MEMBERSHIPS, REMINDERS, PLEDGES, or SUBMISSIONS lists, or use the Email command (sending only to test email addresses) in the CONTACTS list. Note that even if you intend to use the document template to generate emails, for testing purposes you can use the regular Mail Merge button in the CONTACTS list, generating plain text or HTML documents which you can then examine without sending them through your email system first.
- ✔ Use the document template to generate the email or print documents that you want to create.

Mail Merge Codes Dialog

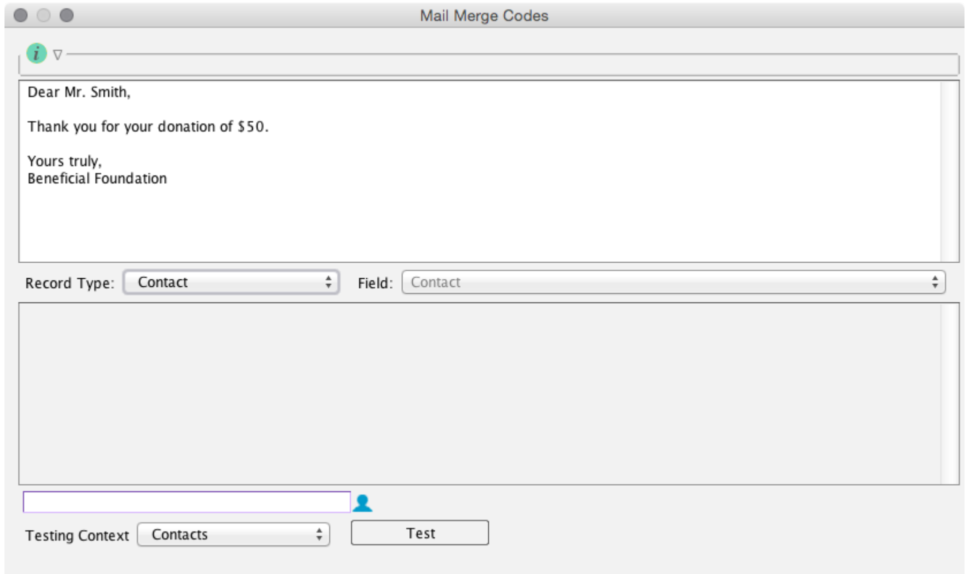
This dialog is used to insert formulas into document templates and to test that the formulas work correctly. This step is performed after you have created the text for a document template. The text produced by this dialog is then put into a word processor or HTML editor for final formatting.

Sumac allows you to make a document template, select the fields you want to use, and test the template.

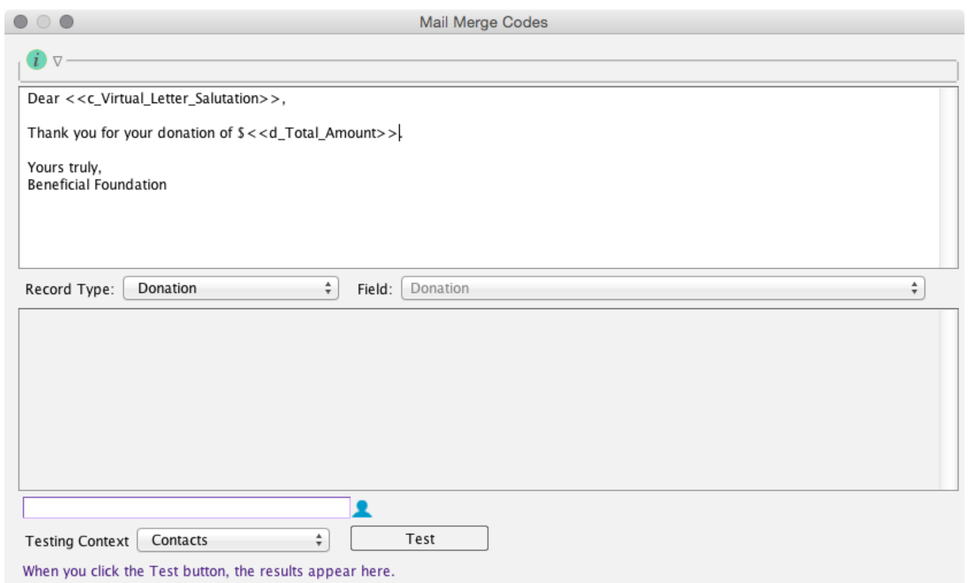
- ✔ Choose Utilities/Template/Mail Merge Codes in the Sumac Console. This window appears:



- ✔ Paste or type the content of your text template in the top scrolling text area. Here is an example (with the Help information hidden):



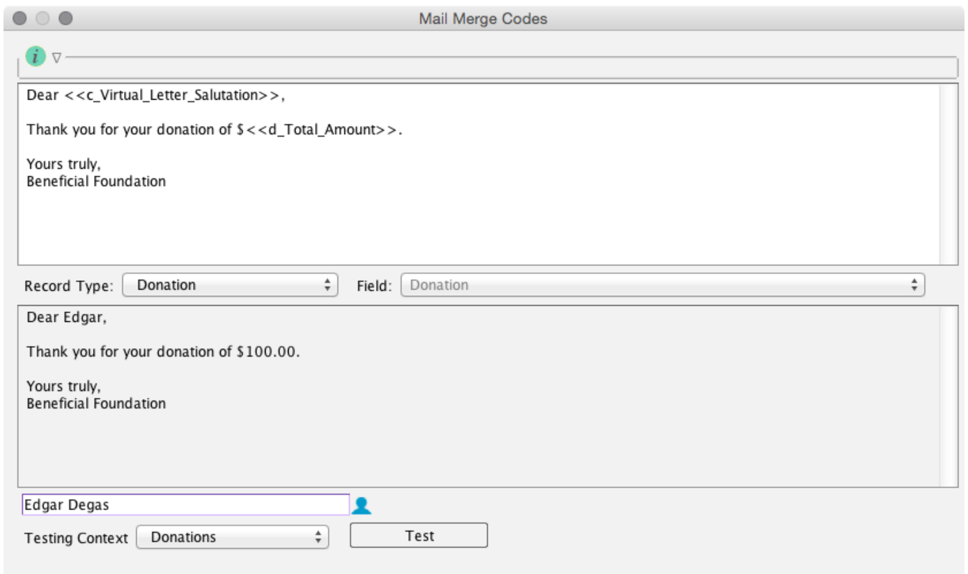
- ✔ Select each piece of text that is specific to a particular Contact or Donation, and use one of the drop-down menus to insert an appropriate formula in its place. In the example, *Mr. Smith* would be replaced by the Letter_Salutation entry in the Contact drop-down menu, and *50* would be replaced by the Total_Amount entry in the Donation drop-down menu. Here is the result:



- ✔ Test the resulting text with formulas inserted into it. In order to do this, you must select a Contact. You must also select the context of the testing – essentially, choose the Sumac list whose Mail Merge button you will be clicking when you use this template.
  - Click the button to select the Contact to be used for testing.
  - Choose from the Testing Context drop-down menu. In the example, we are testing a document template that we intend to use from the Mail Merge button in the Donations list.

Hint: Note that although testing is performed with the contact that you choose, Sumac uses internally-generated test data for other non-contact formulas, so the results may not correspond to any particular data in your database. For example, if you choose a contact record for Joan Smith, then all the fields from the Joan Smith contact record will be used in the test; however, the donation fields will not correspond to any particular donation made by Joan Smith.

✔ Click the Test button. This causes Sumac to treat the top scrolling text area as a document template, and replace the formulas with appropriate values. The result is put into the bottom scrolling text area.



✔ If the test produced an incorrect result, then make any changes to the template and click Test again. Once the results are correct, you can close the Mail Merge Codes dialog. The contents of the top scrolling text area are automatically copied so you can paste it into your document editor (word processor or HTML editor).

✔ Open the word processor or HTML editor you are using to create the final document template. Paste the template contents into your word processor. Format the text as desired. Be sure to save the document as either a text, docx, rtf, or html file depending on what you will use the template for. Note that docx and rtf documents cannot be used as email document templates, so if the intended use of the document template is to create emails then be sure to save as either html or text.

Choosing All Fields

In the Mail Merge Codes Dialog, there are several drop-down menus which insert field names enclosed by angle brackets. The first command in each of these menus is *All Fields*. This command inserts the names of all fields in the object chosen. For example, if you choose All Fields from the Donation drop-down menu, then all fields in a donation are inserted into the template.

Inserting all fields is sometimes useful if you are constructing a form that holds many fields, and it is quicker to get all of them at once than to choose each field individually.

Mail Merge Context

A template can only use formulas that refer to records the Sumac will know about at the time you do the mail merge operation. The records Sumac knows about depend on the context: which list of records is being used when you click Mail Merge. Here is what Sumac knows about in each context:

Context	*Records Available to the Template*
Contacts list	The template can get data from contact records.
Most other lists	The template can get data from the records in the list and also from the primary contact associated with those records.
Invoice list	Mail merge operations on invoices work like most others: the template can get data from the invoice, and its primary (paying) contact. In addition, if the invoice is linked to another record (e.g. a membership record) then the template can refer to fields in that other record.

Tools For Formatting Document Templates

Sumac provides a Mail Merge Codes Dialog, described above, to assist you in creating and testing formulas.

Plain Text Document Templates

You can use any text editor or word processor to create a text document template. It is often most convenient to use a simple text editor (e.g. on Microsoft Windows, use Notepad). This is because word processors tend to display text documents using formatting information that is not available in the final text document, so the appearance of the document will be different when it is finally delivered than it appears in a word processor's editing environment.

DOCX and RTF Document Templates

Use a word processor (e.g. LibreOffice, OpenOffice or Microsoft Word) to create an ordinary word processing document. Then save it as a DOCX or RTF (rich text format) document.

Page Breaks In DOCX and RTF Document Templates

Sumac can use a template to create many documents and save them all into one file. For example, if you have a template that creates a receipt for a donation, you may generate many receipts at once, saving them all into a single file. In this situation, you will probably want each document (e.g. tax receipt) to start on a new page.

If you use a page break in your word processor, putting it either at the very start or very end of your document template, then the resulting multi-document file will have an extra blank page at the beginning or at the end. To eliminate this problem, do not put a page break in the file. Instead, change the format of the very first paragraph in the file, indicating that this paragraph should insert a *page break before* the paragraph. This causes each document (e.g. tax receipt) to start a new page, but does not put an empty page at the start of the file.

If you are using Word 2000 or Word 2003, here are the commands needed:

- ✔ From the *Format* menu, choose the *Paragraph* command.
- ✔ Click the *Line and Page Breaks* tab.
- ✔ Click to turn on the *Page break before* check box.

HTML Document Templates

If you are very knowledgeable about the format of HTML documents, then you can use any text editing program to create an HTML document template.[7]

Most people prefer a more graphical editing environment. Here are some tools that you might consider for creating HTML documents. The commercial products are intended to be used to create web sites, and so may be overkill for creating single documents. The free Mozilla editor is usually quite adequate for smaller HTML projects, like creating a document template.

Product	*Supplier*	*Notes*
GoLive	Adobe	May be phased out as a result of Adobe's acquisition of MacroMedia. www.adobe.com
DreamWeaver	MacroMedia	www.macromedia.com
BEE Pro	MailUp Inc	Paid online plugin drag and drop editor. www.beefree.io/pro/
Mosaico	VOXmail	Free online WYSIWYG drag and drop HTML editor. www.mosaico.io

PDF (Acrobat) Templates

Adobe sells software products for creating Acrobat forms which Sumac uses as templates. See www.adobe.com.

You can also create a form using LibreOffice (www.libreoffice.org) or OpenOffice (www.openoffice.org), and save it as an Acrobat form document.

[7] If you are manually editing an HTML document template in a text editor then use "<<" as the left delimiter and use ">>" as the right delimiter for formulas.

Appendix A – Formulas

Basic Syntax

Sumac can now insert, into a document being generated by a template, information about contacts who are related to the contact for whom the document is being generated.

Here is how this works: Template documents may contain formulas surrounded by double angle brackets <<...>>. As it processes the template document, Sumac replaces the formula between the double angle brackets with text that is extracted from the Sumac database. For example, <<*c_last_name*>> could be replaced by *Smith*.

Three Kinds of Formulas

There are three basic kinds of Formulas:

List Item Formulas	produces a tab delimited line for each sub-record being used in the merge
Related Contact Formulas	produce a list of data fields for several CONTACTS related to the one for whom a document is being produced
Single Value Formulas	produce a single value to replace the formula

The next two, fairly brief, section discuss List Item Formulas and Related Contact Formulas. The balance of this appendix discusses Single Value Formulas

List Item Formulas

Inside the double angle brackets, you may include a formula that looks like this:

<<LI{list of communication types}{list of fields}>>

where:

LI	*LI* stands for List Items. It must appear just as it is.
list of communication types	This list is only used when doing a mail merge operation from the contacts list.
list of fields	A list of field names, enclosed in brace brackets and separated by semi-colons. These fields are generated for each list item.

Total Syntax

If one of the fields in a List Item formula is numeric, you can total it. The syntax for a total of a variable is the name of the variable, preceded by two underscores.

For example, the cost of a workshop is w_Amt_Total. The total of all list item workshops would be __w_Amt_Total.

When you do a mail merge with Grow-Your-Own (GYO) records, and use the sum syntax (e.g. __y_Amount1), the sum of the field identified is calculated for the GYO record's child records.

Count Syntax

If several records are being used in a single mail merge document, then the variable __*licount* generates the number of records.

Mail Merge

When performing a Mail Merge with an HTML template containing a list (LI) formula, Sumac produces an entire HTML table, complete with column headings.

Mail Merge From Contacts List

If you are doing a mail merge from the contacts list, an LI formula can be used to show communication records for each contact. For example:

```
<<LI{newsletter;newsletter2}{h_Date}>>
```

The first pair of brace brackets holds a list of communication types. The second pair of brace brackets is the list of communication fields to be included.

> Hint: the communications are listed in reverse chronological order.

Mail Merge From Donations List

When you do a Mail Merge from the Donations list, you can group donations by receipt number or by donor. Here is a sample template that summarizes a donor's donations. Note that → represents a tab character which is invisible in most text editors.

```
<<g_Date>>

<<c_Mail_Address_Donation>>

Dear <<c_Virtual_Letter_Salutation>>,

Here is a summary your donations over the last year:

Date →  Receipt Amount →         Total Amount

<<LI{d_When_Received;d_Receipt_Amount;d_Total_Amount}>>

→       <<__d_Receipt_Amount>> → <<__d_Total_Amount>>

Yours truly,
```

Another possibility is grouping donations by the In Honour field. A template can then use an LI formula to include information about each donation in honour (or in memory) of the particular person. Here is a fragment from a template that includes the amount and donor from each donation, followed by the total value of all the donations:

```
<<LI {d_Total_Amount;d_Contact_Name}>>
total: <<__d_Total_Amount>>
```

Mail Merge From Grow-Your-Own List

The LI syntax in mail merge formulas can be used to produce reports about linked GYO records. The main record is the parent, and the LI syntax inserts information about linked child GYO records.

Here is a simple template that produces the name of the first contact in the parent record, and a contact name and long text field for each child record:

```
<<y_Contact1Name>>
<<LI {y_Contact1Name;y_LongText1}>>
```

> Hint: When you do a mail merge with GYO records, and use the sum syntax (e.g. __y_Amount1), the sum of the field identified is calculated for the linked child records.

Mail Merge from Invoices List

When you do a mail merge of invoices, the child records displayed by LI syntax are the payment schedule entries associated with each invoice. Here is a sample template:

```
bill to: <<iv_Bill_To_Name>>
total: <<iv_Total>>
notes: <<iv_Notes>>
<<LI {ip_When_Actually_Paid;ip_Amount_Actually_Paid}>>
```

Mail Merge from Lots List

Mail merge operations on auction attendees can show the list of items the attendee won at the auction. Here is a sample template:

```
Auction Name: <<f_Auction_Name>>
Buyer: <<f_Contact_Name>>
Paddle: <<f_Paddle>>
Lot Amount: <<f_Lot_Amount>>
Donation Amount: <<f_Donation_Amount>>
Total Amount: <<f_Total_Amount>>
Credit Card: <<f_Credit_card>>

<<LI {l_Lot_Number_Primary;l_Title;l_Sold_Price}>>
```

Mail Merge from Payment Batches List

When you mail merge from the Payment Batches list window, the list of items that shows for a payment batch is the list of payments associated with the batch. So this line:

```
<<LI{a_Payer_Name;a_Total_Amount}>>
```

shows the payer name and total amount of the payments within a batch.

Mail Merge from Payments List

The Mail Merge button in the Payments list window lets you group payment records by contact, so you can use formulas with LI syntax to summarize them in reports. Here is a sample of how this could work to generate a list of payments showing each payment’s date, payment method, and amount, followed by the total amount of all the payments:

```
<<LI{a_When;a_Payment_Type_Name;a_Total_Amount}>>
<<__a_Total_Amount>>
```

Mail Merge from Pledges List

Mail merge operations on pledges can show information about the donations received for that pledge. To support this, there are two special variables which generate either an amount from the donor or the amount from a soft credit contact:

d_Pledged_Amount_Receipt	If the donation is attached to a pledge from the its donor, then this variable generates the receipt amount in the donation. Otherwise, this variable will generate the amount of the donation that is allocated to a soft credit donor.
d_Pledged_Amount_Total	If the donation is attached to a pledge from the its donor, then this variable generates the receipt amount in the donation. Otherwise, this variable will generate the amount of the donation that is allocated to a soft credit donor.

Here is an example:

```
Pledge Date: <<p_Commitment_Date>>
Pledge Amount: $<<p_Total_Amount>>
Receipts to date: <<__d_Pledged_Amount_Receipt>>
Most recent donation: <<d_When_Received>>
Balance Owed: $<<p_Balance_Owed>>
Payment History:
<<LI{d_When_Received;d_Pledged_Amount_Receipt}>>
```

Mail Merge From Sales List

You can list and aggregate the items in the sale. So:

```
<<LI{vp_Product_Name;vp_Quantity;vp_Extended_Price}>>
<<__vp_Extended_Price>>
```

shows a list of product names, quantities, and their extended price, followed by the total of the extended prices for all ordered items.

Mail Merge From Time Dockets List

You can aggregate time dockets by worker or by client. See *Aggregating Multiple Time Dockets* on page 374.

Mail Merge From Tour Booking Programs List

When you do a mail merge operation from the Tour Booking Programs list, a separate mail merge document is produced for each selected program. The list items are the workshops within the program. So, this template:

```
<<LI {w_Name;w_Amt_Total}>>
```

would produce a list containing the names and cost totals for each of the workshops. This list might be followed by the following line:

```
grand total     $<<__w_Amt_Total>>
```

which adds up the totals for all workshops.

Mail Merge From Tour Booking Involved Contacts List

When you do a mail merge from the Involved Contacts list, Sumac creates a single merged document for all the selected involved contact entries. Involved contact records are able to retrieve fields from the personnel, workshop, and program records that contain them. This example:

```
<<LI {w_When;w_Venue_Name;w_Name;z_Amt_Fee}>>
```

produces a list with four columns: the date, venue, and name of the workshop, and the fee charged by the performer for that workshop. This list might be followed by:

```
Total: <<__z_Amt_Fee+__z_Amt_Tax1>>
```

which adds up the fees for all the personnel records selected to perform the mail merge.

Related Contact Formulas

Inside the double angle brackets, you may include a formula that looks like this:

<<RC{list of relation types}{list of contact fields}>>

where:

RC or RT	*RC* stands for Related Contacts. It must appear just as it is. You can use RT instead of RC: see below.

list of relation types	A list of relation type names enclosed in brace brackets and separated by semi-colons. Only contacts with one of these relations to the contact for which the mail merge is being performed are included in the resulting document.
list of contact fields	A list of contact field names, enclosed in brace brackets and separated by semi-colons. These fields are generated for each related contact.

Here is an example:

<<RC{has Chairman;has President}{c_Name;c_MD_Title;c_MD_Phone;c_MD_Email}>>

When you use this type of formula, a new line is generated for each contact that is related to the one for which the mail merge is being performed.

Related contacts are emitted into the merged document based on the order that the relation types are listed.

Special Variables in Related Contact Formulas

When you use an RC formula to present information about related contacts, there are two variables that let you generate information about the relationship:

c_relation	the name of the relationship
c_relation_note	the note field in the relationship record

RT Formulas

Formulas that use RC to get information about related contacts separate the resulting fields using semi-colons. If you want to have the resulting fields separated by tab characters instead of semi-colons, use *RT* instead of *RC*. This makes the resulting data line up into columns for use in a spreadsheet. If you use the RT formula with an HTML template, then Sumac inserts a table into the document for you.

Single Value Formulas

Formulas that are not Related Contact Formulas, produce a single value: a number or a piece of text. This type of formula can contain numeric values, combined with operators and functions.

Numeric Values

Format	*Example*	*Description*
number	18 123.4	A number. It may be an integer, having no decimal places. It may be a real number, having decimal places. Commas are not allowed (so 12,345.67 is not a valid number).
number (scientific notation)	1.234e2	A number may be entered using scientific notation. In this notation, a number with a decimal point is followed by the letter e which signifies *times ten to the power of*. After the e, comes the exponent for 10. So 1.234e2 is equivalent to 1.234 x 10^2 which is also the same as 123.4.
tables	lifeExpectancy[age]	Tables are n-dimensional arrays of numbers. They are defined as a lookup list in

Format	Example	Description
		the database. When used in a formula, the table name is followed by indexes separated by commas and enclosed in brackets. Hint: Tables are available if you have licensed Sumac Proposals.
variable	d_Receipt_Amount	Variables used in a formula evaluate to the value of the variable. The variables that are allowed are defined below.
function	round(userValue,0)	A function is invoked by specifying its name, followed by its parameters within parentheses and separated by commas. See *Functions* below for detailed information about the functions that can be used in formulas.

Operators

There are three classes of operators: multiplicative, additive, and relational.

When formulas are evaluated, operators are acted upon in order of their precedence. Multiplicative operators are done first, then additive operators, then relational operators.

Relational operators produce a value of 1 if the relation is true, and 0 if the relationship is false.

Format	*Example*	*Value of Example*	*Description*
multiplicative operators	5 * 4	20	Asterisk performs multiplication.
	5 / 4 5 / 0	1.25 0	Forward slash performs division. If the second operand has a value of zero, the result is zero.
	5 ^ 4 0 ^ 0 4 ^ 0.5	625 0 2	Circumflex (hat) performs exponentiation. If the first operand is zero and the second is negative or zero, then the result is zero. If the first operand is less than zero and the second operand is not an integer, then the result is zero.
additive operators	5 + 4	9	The plus operator performs addition.
	5 - 4	1	The minus operator performs subtraction.
relational operators	5 = 5 5 = 4	1 0	The equal operator gives 1 if its operands have the same numerical value.
	5 > 4 5 > 5	1 0	The greater than operator gives 1 if its left operand is numerically greater than its right operand.

Format	*Example*	*Value of Example*	*Description*
	5 < 4 4 < 5	0 1	The less than operator gives 1 if its left operand is numerically less than its right operand.
	5 >= 4 4 >= 5	1 0	The greater than or equal to operator is formed by a greater than sign followed by an equal sign. It gives 1 if its left operand is numerically greater than or equal to its right operand.
	5 <= 4 4 <= 5	0 1	The less than or equal to operator is formed by a less than sign followed by an equal sign. It gives 1 if its left operand is numerically less than or equal to its right operand.
	5 <> 5 5 <> 4	0 1	The not equal operator is formed by a less than sign followed by a greater than sign. The not equal operator gives 1 if its operands do not have the same numerical value.

Parentheses In Formulas

The order of evaluation of operators can be altered by means of parentheses. Formulas in parentheses are evaluated before other formulas. Here are some formulas and the results that they produce:

Formula	*Result*
3 + 4	7
3 + 4 * 5	23
(3 + 4) * 5	35

Functions

A function performs a specific, predetermined calculation. A function is used by specifying its name, then a list of one or more parameters enclosed in parentheses. For example, ceiling(7.2) uses the CEILING function, and the parameter to the function is 7.2.

Format	*Example*	*Value of Example*	*Allowable Parameter Count*	*Description*
ABS	abs(1-5)	4	1	absolute value of the parameter
AND	and(4<5,3<>6)	1	2 to 10	0 if any parameter is 0, 1 otherwise
CASE	case(2,1,2,3,4)	3	2 to 20	A generalized IF function (see IF below) in which the first parameter is evaluated and then used to choose one of the other parameters. The first parameter is evaluated and put into i. i is forced into the range 0 to (n-2) where n is the number of parameters. The value of the function is the value of parameter i+2.

Format	*Example*	*Value of Example*	*Allowable Parameter Count*	*Description*
CEIL-ING	ceiling(7.2) ceiling(7.53,-1)	8 7.6	1 to 2	The first parameter truncated towards infinity (or negative infinity if it is negative). If there is a second parameter s then the first parameter is truncated in the 10^s digit. If there is no second parameter, then s is assumed to be 0. If s is not an integer, it is reduced to the first integer lower than it.
DATE	date(2006,12,31)		3	the parameters are treated as a year, a month, and a day within the month, and the computed result is the numeric value of the designated date
DAY	day(date(2006,12,31))	31	1	extract the day from a date parameter
EXP	exp(2)	7.389…	1	e to the power of the parameter
FLOOR			1 to 2	FLOOR is a synonym for TRUNC - see below
FOR-MATDATE	formatdate(date(2006,12,31))	2006-12-31	1	this function should be used as the last-performed (i.e. outermost) function in a formula. It causes the date parameter to be formatted as a date.
FOR-MATNUMBER	formatnumber(3,1) formatnumber(3.5)	3.0 3	1 or 2	Format a number with a specific number of decimal places. The first parameter is the number to be formatted. The second parameter is the desired number of decimal places (default: zero).
IF	if(3<4,23,45) if(3>4,23,45)	23 45	3	if the first parameter is not 0 then the second parameter, otherwise the third parameter
LEN	len(c_prefix)		1	The length of the parameter converted to a string. For example, if c_prefix is “Mrs.” the example formula will have a value of 4.
LN	ln(exp(1))	1	1	Natural logarithm of the parameter. If the parameter is not greater than zero, the function produces a result of zero.
MAX	max(4,6,5)	6	2 to 10	the numerical maximum of the parameters
MIN	min(4,6,5)	4	2 to 10	the numerical minimum of the parameters
MOD	mod(12,5)	2	2	The remainder of the first parameter divided by the second parameter. Result has the same sign as the first parameter. If the second parameter is zero, then the function produces a result of zero.
MONTH	month(date(2006,12,31))	12	1	extract the month from a date parameter
NOT	not(3<4) not(3=4)	0 1	1	1 if the parameter is zero, 0 otherwise
NOW	now(0) now(7)	today’s date one week hence	1	the result of this function is a date offset from the current date by the parameter number of days

Format	*Example*	*Value of Example*	*Allowable Parameter Count*	*Description*
NPV	npv(0.0875,345,276,-145)	437.87	2 to 30	The net present value of a series of payments or receipts The first parameter is the discount rate (for one period). All other parameters are payments (negative) or receipts (positive) for several equal periods, occurring at the end of each period.
OR	or(3<2,5<4) or(3<4,5<4)	0 1	2 to 10	1 if any parameter is non-zero, 0 otherwise
PV	pv(0.08/12,240,500,0,0)	-59777.15	3 to 5	the present value of a stream of equal payments parameter 1: discount rate per period parameter 2: total number of periods parameter 3: payment in each period parameter 4: future value to be attained after the last payment (default value of 0) parameter 5: 0 if payments are at the end of the period, 1 if payments are at the start of the period (default value of 0)
ROUND	round(3.4) round(123.45,2)	3 100	1 to 2	The parameter rounded. If there is a second parameter s then the first parameter is rounded in the 10^s digit. If there is no second parameter, then s is taken to be 0. If s is not an integer, it is reduced to the first integer lower than it.
SIGN	sign(3-7)	-1	1	0 if the parameter is zero, 1 if the parameter is positive, -1 if the parameter is negative
SQRT	sqrt(169)	13	1	Square root of the parameter. If the parameter is negative, then the result of the function is zero.
STRCONTAINS	strcontains(g_user,J)	1 if g_user has the letter "J" anywhere in it, otherwise 0	2	The first parameter is a variable and the second is a string literal (with no delimiters of any sort). It returns a true result if the first parameter contains the second parameter.
STREQUALS	strequals(g_user,John)	1 if g_user is "John", otherwise 0	2	The first parameter is a variable and the second is a string literal (with no delimiters of any sort). One use of this is to have different text in thank-you letters depending on the user who is doing the mail merge operation. Text comparisons are case insensitive.
TEXTDATE	textdate(c_di)	a date	1	Convert text to a date. The parameter should be a variable that holds text that Sumac can convert to a date. See *Arithmetic Using Dates* below.
TRUNC	trunc(7.4) trunc(-7.4) trunc(766,1)	7 -7 760	1 to 2	The first parameter truncated towards zero. If there is a second parameter s then the first parameter is truncated in the 10^s digit (i.e. digits to the right of the 10^s digit are set to zero). If there is no second parameter, then s is taken to be 0. If s is not an integer, it is reduced to the first integer lower than it.

Format	*Example*	*Value of Example*	*Allowable Parameter Count*	*Description*
YEAR	year(date(2006, 12,31))	2006	1	extract the year from the parameter date

Arithmetic Using Dates

In Sumac formulas, a date is represented as a number of seconds past midnight on January 1, 1970.

There are five functions for doing arithmetic on dates: date, year, month, day, and now. There is also a function for formatting dates: formatDate and textDate.

Here are some calculations you may want to do on dates:

Formula	*Calculation*
year(now(0))-c_Birth_Year-if((100*12+31)<(100*c_Birth_Month+c_Birth_Day),1,0)	Determine a contact’s age on December 31 of the current year.
year(now(0))-c_Birth_Year-if((100*month(now(0))+day(now(0)))<(100*c_Birth_Month+c_Birth_Day),1,0)	Determine a contact’s age today. This example is for illustration purposes only. There is a variable – c_age – which does this calculation for you.
(if(0=textdate(c_do),date(2013,7,31),min(textdate(c_do), date(2013,7,31)))-max(textdate(c_di),date(2013,7,1)))/ 86400+1	If there are two dates (incoming date c_di and outgoing date c_do) in contact record extra fields (which are actually text fields), this formula finds the number of days between these two dates that occurred in the month of July 2013.

Tables

Examples

In this section about Tables, examples assume the following tables have been defined:

Table Name	*Dimensions*	*Values*	*Description*
timesThreeTable	10	0,3,6,9,12,15,18,21,24,27	a one-dimensional table with 10 entries
testThings	3,4	1,2,3,4,8,7,6,5,9,10,11,12	a two-dimensional table with three rows and four columns

Two Basic Techniques

A reference to a table consists of the table’s name followed by index formulas in square brackets. There must be at least one index formula. If there are two or more index formulas, they should be separated by commas. Some examples:

```
timesThreeTable[2]
timesThreeTable[case(2,1,2,3,4)]
testThings[row,column]
```

There are two basic ways to use tables to get values in a formula.

- Specify one index formula for each dimension.

- Specify one index formula for each dimension and also an additional index formula which combines with the others to do a search operation in the table.

The next two sections describe these two alternatives.

Regular References

Values in a table with n dimensions can be accessed by specifying n index formulas. Here are some important points about how index formulas are used:

- The first entry in each dimension is numbered zero. Indexes increase by 1 in each dimension.
- If a dimension is out of range it is forced into range. Negative values are forced to zero. Excessively large values are forced to the largest allowed value for the particular table dimension.

For example:

Example	*Value*	*Description*
timesThreeTable[1]	3	Entry 1 is the second entry in the table. Remember that indexes start at zero.
timesThreeTable[17]	27	The index is too large, so the result is the last entry in the dimension.
testThings[1,1]	7	The entry in the second row and second column of testThings.
testThings[2,3]	12	The entry in the third row and fourth column of testThings.

Searching References

There is another way to use tables. This way of using tables enables you to search for entries in a table. Searches are always done through values in the last dimension in the table, so you must specify actual index formulas for the first n-1 dimensions in an n-dimensional table. To do searches in an n-dimensional table:

- specify actual subscripts for the first n-1 index formulas, then
- specify a search criterion to search through values in the last dimension of the table, then
- specify a value to search for

Note that this means that a search in an n-dimensional table requires n+1 index formulas inside the brackets.

The result of a search operation is the subscript, not the value in the table, of the table entry that matched the search (or -1 if no entry matched the search).

Here are all the search types that are available, and how they perform their searches:

Search Type	*Example*	*Value of Example*	*Description*
1	timesThreeTable[1,6] testThings[1,1,7]	2 1	find the first table value *equal* to the search value
2	timesThreeTable[2,4] testThings[0,2,7]	1 3	find the table value *closest* to the search value
3	timesThreeTable[3,0] testThings[1,3,8]	1 1	find the first table value *not equal* to the search value

Search Type	*Example*	*Value of Example*	*Description*
4	timesThreeTable[4,16] testThings[0,4,2.2]	5 1	find the table value *closest to but not equal* to the search value
5	timesThreeTable[5,6] testThings[1,5,6]	0 2	find the first table value *less than or equal* to the search value
6	timesThreeTable[6,6] testThings[2,6,11.8]	2 2	find the table value *closest to and less than or equal* to the search value
7	timesThreeTable[7,23] testThings[1,7,6]	0 3	find the first table value *less than* the search value
8	timesThreeTable[8,19] testThings[2,8,20]	6 3	find the table value *closest to and less than* the search value
9	timesThreeTable[9,16] testThings[0,9,3.5]	6 3	find the first table value *greater than or equal* to the search value
10	timesThreeTable[10,16] testThings[1,10,6.5]	6 1	find the table value *closest to and greater than or equal* to the search value
11	timesThreeTable[11,99] testThings[0,11,10] testThings[2,11,10]	-1 -1 2	find the first table value *greater than* the search value
12	timesThreeTable[12,22] testThings[1,12,5]	8 2	find the table value *closest to and greater than* the search value

Variables

> Hint: The most accurate and current list of variables supported in mail merge formulas can be obtained from the Mail Merge Codes dialog.

When constructing a formula, you can use a variable – a symbolic name – to represent information to be extracted from the database.

Most variables have a name that is somewhat descriptive. Variable names usually start with a prefix that indicates the type of data object whose field value is being referenced. Here are the prefixes used:

a_ PAYMENT record
ab_ payment batch
b_ collection object
c_ CONTACT record
cr_ course
d_ DONATION record
e_ time docket
f_ auction attendee
fp_ funding program

fr_ funder request
g_ general information (e.g. today's date)
ga_ GRANT APPLICATION record
h_ COMMUNICATION record
i_ PROPOSAL record
iv_ INVOICE record
ip_ invoice payment
j_ job opening
l_ lot
m_ MEMBERSHIP record
o_ OFFICE record
p_ PLEDGE record
q_ task
r_ registration
rm_ reminder
s_ SUBMISSION record or session
s_ session
t_ ticket
u_ ticket order
v_ sale
vp_ sale product
w_ TOUR BOOKING workshop
wl_ wait list entry
x_ TOUR BOOKING program
y_ grow-your-own
z_ personnel
__ total (for more, see page 506)

The variables that can be used are defined in drop-down menus in the Utilities/Template/Mail Merge Codes window. The following tables explain what a particular variable name produces if it is not obvious from its variable name.

Contact Fields

A mail merge formula may specify a particular contact field in the records being merged, and get any field from that contact's record.

The variable name is specified in two parts, separated by a colon (:).

- the first part is the contact ID field in the records being merged
- the second part is the contact field to be included in the document

For example, if you are mail merging communications, this formula:

<<h_Contact_ID:c_Time_Zone_Name>>

inserts the time zone from the first contact identified in the communication record.

Variables for Contacts

Variable Name	*Value*
c_Age	The CONTACT's age. If no birth year is known, age evaluates to -1. If a month is not known it is set to January. If a day is not known it is set to 1.

Variable Name	*Value*
c_Phone	This variable produces a phone number which is Sumac's best guess at the CONTACT's current phone number. Sumac takes into consideration vacation address effectivity dates, the check box specifying that the business address should be used, the phone numbers and cell phone numbers that are available in each address.
c_Mail_Address	The complete mailing address for the CONTACT. This includes the address information from either the first or second address (depending on the choice made in the contact's record). It also includes an appropriate salutation for the CONTACT. In templates that use the variable c_Mail_Address, the value produced is the virtual salutation instead of the entered salutation. This gives you more flexibility; for example, it enables you to establish a company-wide standard for salutations and not enter values into the fields themselves.
c_Mail_Address_Donation	This special variable generates a mailing address appropriate for donation receipts. It is like c_Mail_Address, but does not include the following four fields from the Business Address for the CONTACT: Salutation, Title, Department, and Organization.
c_Pref_Apartment	either c_Residence_Apartment, c_Business_Apartment, or c_Vacation_Apartment depending on the setting of c_Use_Business_Address and the effectivity of the vacation address
c_Pref_Cell_Phone	either c_Residence_Cell_Phone, c_Business_Cell_Phone, or c_Vacation_Cell_Phone depending on the setting of c_Use_Business_Address and the effectivity of the vacation address
c_Pref_City	either c_Residence_City, c_Business_City, or c_Vacation_City depending on the setting of c_Use_Business_Address and the effectivity of the vacation address
c_Pref_Country	either c_Residence_Country, c_Business_Country, or cVacation_Country depending on the setting of c_Use_Business_Address and the effectivity of the vacation address
c_Pref_Department	either an empty string or c_Business_Department depending on the setting of c_Use_Business_Address

Variable Name	*Value*
c_Pref_Email	either c_Residence_Email, c_Business_Email, or c_Vacation_Email depending on the setting of c_Use_Business_Address and the effectivity of the vacation address
c_Pref_Fax	either c_Residence_Fax, c_Business_Fax, or c_Vacation_Fax depending on the setting of c_Use_Business_Address and the effectivity of the vacation address
c_Pref_Organization	either an empty string or c_Business_Organization depending on the setting of c_Use_Business_Address
c_Pref_Phone	either c_Residence_Phone, c_Business_Phone, or c_Vacation_Phone depending on the setting of c_Use_Business_Address and the effectivity of the vacation address
c_Pref_Extension	either c_Residence_Extension, c_Business_Extension, or c_Vacation_Extension depending on the setting of c_Use_Business_Address and the effectivity of the vacation address
c_Pref_Postal_Code	either c_Residence_Postal_Code, c_Business_Postal_Code, or c_Vacation_Postal_Code depending on the setting of c_Use_Business_Address and the effectivity of the vacation address
c_Pref_Salutation	either c_Residence_Salutation, c_Business_Salutation, or c_Vacation_Salutation depending on the setting of c_Use_Business_Address and the effectivity of the vacation address
c_Pref_State	either c_Residence_State, c_Business_State, or c_Vacation_State depending on the setting of c_Use_Business_Address and the effectivity of the vacation address
c_Pref_Street_A	either c_Residence_Street_A, c_Business_Street_A, or c_Vacation_Street_A depending on the setting of c_Use_Business_Address and the effectivity of the vacation address
c_Pref_Street_B	either c_Residence_Street_B, c_Business_Street_B, or c_Vacation_Street_B depending on the setting of c_Use_Business_Address and the effectivity of the vacation address
c_Pref_Title	either an empty string or c_Business_Title depending on the setting of c_Use_Business_Address
c_Pref_Website	either c_Residence_Website or c_Business_Website depending on the setting of c_Use_Business_Address

Variable Name	Value
c_Date_Range_Donations	the value of DONATIONS made by the CONTACT in a date range specified by the user at the time of merging data from Sumac with the document template
c_Date_Range_Donations_Household	Like c_date_range_donations but if the CONTACT is a household then it includes DONATIONS made by the household members as well as those made by the CONTACT itself.
c_Picture	This variable inserts the picture (from the Picture tab of the CONTACT record) into the output document. Note that this can only be used when merging with an RTF template.

Contact Salutations And Addresses

There are several CONTACT (c_) variables that provide salutations and addresses. They are all listed and described in the table above. Here is a separate list of them, and some usage suggestions.

c_Letter_Salutation	The salutation that follows "Dear…" in a letter.
c_Residence_Salutation	The first line of the mailing address for letters sent to the residence address.
c_Business_Salutation	The first line of the mailing address for letters sent to the business address.
c_Vacation_Salutation	The first line of the mailing address for letters sent to the vacation address.
c_Use_Business_Address	Has a value of 1 if the CONTACT's business address is to be used, 0 if the residence address is to be used. This value may be helpful in constructing special letters using Include Formulas (see page 523).
c_Pref_Salutation	This variable is either c_Residence_Salutation, c_Business_Salutation, or c_Vacation_Salutation depending on the effectivity dates of the vacation address and the setting of the Use Business Address flag.
c_Virtual_Letter_Salutation	This variable has the same value as c_Letter_Salutation. However, if the Letter Salutation field for the CONTACT is empty, then this variable is given a value based on the System-wide Preferences (see *Contacts* in the *Sumac Users Guide*).
c_Virtual_Residence_Salutation	This variable has the same value as c_Residence_Salutation. However, if the Residence Address Salutation field for the CONTACT is empty, then this variable is given a value based on the System-wide Preferences (see *Contacts* in the *Sumac Users Guide*).

c_Virtual_Business_Salutation	This variable has the same value as c_Business_Salutation. However, if the Business Address Salutation field for the CONTACT is empty, then this variable is given a value based on the System-wide Preferences (see *Contacts* in the *Sumac Users Guide*).
c_Virtual_Vacation_Salutation	This variable has the same value as c_Vacation_Salutation. However, if the Vacation Address Salutation field for the CONTACT is empty, then this variable is given a value based on the System-wide Preferences (see *Contacts* in the *Sumac Users Guide*) as specified for the residence address.
c_Mail_Address	This is the complete mailing address to be used for regular postal mailings. It holds either the residence or the business or residence salutation and address, depending on whether c_Use_Business_Address is 0 (residence) or 1 (business).
c_Mail_Address_Donation	If you are creating a template for tax receipts, use this variable instead of c_Mail_Address. It is similar to c_ Mail_Address with one difference: it does not include information from the salutation, title, department, or organization fields in the business address. This results in an address that identifies a company (the company name is in the Last Name field of the CONTACT record) but does not identify an individual at that company. This is the way that a corporate donor on a tax receipt should be identified.
c_Mail_Address_LinesAB	Sumac records a Street A and Street B component in each mailing address. This variable generates these two components as a single piece of text. If a particular address contains both components, then they are separated by a comma.
c_Donation_Last_Amount	The amount of the most recent DONATION from this CONTACT.
c_Donation_Last_Date	The date of the most recent DONATION from this CONTACT.
c_Donation_Total_Amount	The total amount of all DONATIONS ever received from this CONTACT.

Contact Information For Membership Directory

If your organization produces a membership directory, and uses a template to heavily supplement the information available in the standard contact fields, you may want to produce a document that shows a contact all the information that will appear in that contact's directory entry. You can send this document to the contact, and have the contact provide corrections or additions to the information.

In order to do this, you must create a mail merge template then use it to produce a document which contains all the membership directory fields. Sumac enables you to do this by using variable names constructed from the following four pieces:

- c_
- an occurrence number (e.g. the first entry has a number of 0, the second is 1, etc.)
- _
- the name of the field in the membership directory template (note that this name must have no spaces or puntuation in it).

For example, if there is a membership directory template field named *Extra-Phone*, and it can have up to four repetitions (five values), these values could be included in a document template by using:

```
phone number 1:     <<c_0_ExtraPhone>>
phone number 2:     <<c_1_ExtraPhone>>
phone number 3:     <<c_2_ExtraPhone>>
phone number 4:     <<c_3_ExtraPhone>>
phone number 5:     <<c_4_ExtraPhone>>
```

Variables for General Information

Variable Name	*Value*
g_Date	The current date
g_user	The current user. Note that this can be combined with a function to test if a document is being created by a particular user, and omit or include text accordingly. For example, *strequals(g_user,John)* is true if the current user is *John*.

Variables for Time Dockets

Variable Name	*Value*
e_Worker_Billing_Rate	The billing rate of the worker contact.
e_Client_Billing_Rate	The billing rate of the client contact.
e_Billing_Rate	If the client has a billing rate, then use it. Otherwise, use the billing rate of the worker.
e_Billing_Rate_Times_Time	The hourly billing rate (e_Billing_Rate) multiplied by the number of hours spent.

Include Formulas

The Problem

You want to provide different letters for contacts that not only insert information about the contact into the letter, but you also want different paragraphs of text to appear depending on certain conditions.

A common example would be a request for someone to renew their donation. Someone who never gave to your organization before should receive a letter like this:

> Hello Mrs. Staci Floyd.
> O $20.00
> O $50.00
> O $100.00
> O $___________ Other Amount

Someone who has given $50 in the past year, should receive a letter like this:

Hello Ms. Jeannette Coffee.
You previously gave: $50.00
O $50.00
O $55.00
O $75.00
O $___________ Other Amount

Someone who has given $100 in the past year, should receive a letter like this:

Hello Mr. Harlan Perkins.
You previously gave: $100.00
O $100.00
O $110.00
O $150.00
O $___________ Other Amount

Notice two things:

- The line indicating how much was previously donated is omitted in the first letter.
- The amount of the suggested donation varies depending on the past donations.

The Solution

A document template can be created to generate these letters. This is done using *include formulas*. An *include formula* is just like a formula – it uses the same variables, functions, and calculations. However, an *include formula* has these special characteristics:

- The formula is distinguished from other formulas by having a vertical bar (|) as its first character within the angle brackets.
- Nothing generated by the *include formula* itself is put into the resulting document.
- If the formula evaluates to true (not zero), then the whole paragraph containing the formula will be included in the resulting document. If the formula is false, then the paragraph is omitted.

Here is the document template that generated the above three letters (the line numbers are not part of the document template):

[1] Hello <<c_Name>>.
[2] <<|5<=c_date_range_donations>>You previously gave: $<<c_date_range_donations>>
[3] <<|c_date_range_donations<10>>O $20.00
[4] <<|c_date_range_donations<10>>O $50.00
[5] <<|c_date_range_donations<10>>O $100.00
[6] <<|10<=c_date_range_donations>>O $<<c_date_range_donations>>
[7] <<|10<=c_date_range_donations>>O $<<1.1*c_date_range_donations>>
[8] <<|10<=c_date_range_donations>>O $<<1.5*c_date_range_donations>>
[9] O $___________ Other Amount

Here is an explanation of how each line works:

[1] This line greets the contact. It occurs in all letters generated by this document template.

[2] The first formula <<|5<=c_date_range_donations>> starts with a vertical line, indicating that it is an *include formula*. This line is included only if the contact has made donations of at least $5 in the relevant time period. If the line is included, it will show the second formula <<c_date_range_donations>> which shows how much the contact donated in the time period.

[3] This line, and lines [4] and [5], all contain the same *include formula*. These lines are only included in the resulting letter if the DONATIONS from this CONTACT are less than $10 in the relevant time period. These three lines together suggest donation levels of $20, $50, and $100.
[4] See line [3].
[5] See line [3].
[6] This line, and lines [7] and [8], all start with the same *include formula*: <<|10<=c_date_range_donations>>. This indicates that these three lines will be included in the resulting letter if the CONTACT has donated at least $10 in the relevant time period. If this *include formula* is true, then line [6] produces a suggested donation level equal to the amount previously donated.
[7] See line [6]. Note that this line [7] produces a suggested donation level equal to the amount previously donated plus 10%.
[8] See line [6]. Note that this line [7] produces a suggested donation level equal to the amount previously donated plus 50%.

Include Formulas – Advanced Example

This section shows how include formulas can be used to choose appropriate paragraphs in a letter. It is fairly advanced, so you should read and understand the previous section – *Include Formulas* on page 523 – before reading this section.

The Problem

You want to provide different letters that not only insert information about the CONTACT into the letter, but also include different paragraphs of text, depending on previous donation levels.

A common example is an annual renewal campaign requesting that donors not only renew their financial commitment, but also including a request to increase their gift and as a result join a higher giving circle.

By employing a document template with include formulas, one template can be used to generate a series of letters, based on a donor's giving history and your organization's giving levels.

The next section shows the template that can be used to do this, and it is explained. The section after that contains some examples that show what letter the template generates under different circumstances.

Template

Here is a document template that can generate the required letters (the line numbers are not part of the document template):

[1] Dear <<c_letter_salutation>>,
[2] Thank you for your generous donation of $<<c_date_range_donations>> in support of our activities.
[3] <<|OR(AND(10<= c_date_range_donations , c_date_range_donations <75),AND(100<= c_date_range_donations , c_date_range_donations <200),AND(250<= c_date_range_donations , c_date_range_donations <400),AND(500<= c_date_range_donations , c_date_range_donations <600))>>In honour of our 25th anniversary celebration in June, 2005, would you consider donating $<<CEILING(1.1*c_date_range_donations,1)>>?
[4] <<|c_date_range_donations<10>>In honour of our 25th anniversary, would you consider increasing your donation to $10 and become a Team Member of our Agency? You will then be eligible to receive a tax receipt for income tax purposes.
[5] <<|AND(75<=c_date_range_donations,c_date_range_donations<100)>>In honour of our 25th anniversary, would you consider increasing your donation to $100 and become a member of our Silver Supporters? As a member of Silver Supporters, you receive these benefits…?

[6] <<|AND(200<=c_date_range_donations,c_date_range_donations<250)>>In honour of our 25th anniversary, would you consider increasing your donation to $250 and become a member of our Gold Supporters? As a member of the Gold Supporters, you receive these benefits…?
[7] <<|AND(400<=c_date_range_donations,c_date_range_donations<500) >>In honour of our 25th anniversary, would you consider increasing your donation to $500 and become a member of our Platinum Supporters with these additional benefits…?
[8] <<|AND(600<=c_date_range_donations,c_date_range_donations<750)>>In honour of our 25th anniversary, would you consider increasing your donation to $750 and move to our Super Supporter level with these additional benefits…?
[9] Thank you very much for your support.
Sincerely,
Arleen Cornell
Executive Director

Would you like to continue supporting our Agency?
[10] <<|c_date_range_donations<=74>>O $________$10.00 to $ 99.00 Team Member
[11] <<|c_date_range_donations<=199>>O $________$100.00 to $249.00 Silver Supporter
[12] <<|c_date_range_donations<=399>>O $________$250.00 to $499.00 Gold Supporter
[13] <<|c_date_range_donations<=599>>O $________$500.00 to $749.00 Platinum Supporter
[14] O $________$750.00 + Super Supporter
O $________ Other Amount

Here is how each line works:

[1] This line greets the CONTACT. It occurs in all letters generated by this document template.

[2] The variable <<c_date_range_donations>> shows how much the CONTACT donated in the time period. This line also occurs in all letters generated.

[3] The first very long formula starts with a vertical line, indicating that it is an *include formula*. The formula checks to see if the CONTACT has made donations within one of four amount ranges ($10 to $75, $100 to $200, $250 to $400, $500 to $600) in the relevant time period. If the line is included, it will show the second formula <<CEILING(1.1*c_date_range_donations,1)>> which shows how much the CONTACT donated in the time period plus 10%. The CEILING function causes any fractions to be rounded up and the 1 after c_date_range_donations means to round up to the nearest $10.00. So a value of $54 will show as $60.

[4] This line, also starts with an *include formula*: <<| c_date_range_donations<10>>. This indicates that this line will be included in the resulting letter if the CONTACT has donated less than $10 in the relevant time period. If this *include formula* is true, then this line asks the donor to donate $10 and become a member.

[5] See line [4]. Note that this line is included if the CONTACT has made DONATIONS of at least $75 and less than $99.

[6] See line [4]. Note that this line is included if the CONTACT has made DONATIONS of at least $200 and less than $249.

[7] See line [4]. Note that this line is included if the CONTACT has made DONATIONS of at least $400 and less than $499.

[8] See line [4]. Note that this line is included if the CONTACT has made DONATIONS of at least $600 and less than $749.

[9] These lines are always included as part of the letters that are generated.

[10] This line, starts with the *include formula*: <<| c_date_range_donations<=74>> indicating that this line will be included if the CONTACT has donated less than or equal to $74 in the relevant time period. If they have donated more, we don't want to include this level. We include

the next level because we have asked them in a previous paragraph if they would like to move up.

[11]See line [10] for DONATIONS less than or equal to $199

[12]See line [10] for DONATIONS less than or equal to $399

[13]See line [10] for DONATIONS less than or equal to $599

[14]These two lines are always included as part of the letters that are generated.

Things To Notice in The Following Examples

- The amount of the suggested DONATION varies depending on past donations.
- The paragraphs in the letter may ask the donor to move to another level and list the benefits, or alternatively may ask the donor to increase his DONATION by 10%.
- Member levels that have a range less than the requested DONATION are not listed.

First Example

Bryan gave $80 last year. Because he gave in between the amounts of $75 and $100, the template will move him up to the next giving level, to between $100 and $249.

> Dear Bryan,
> Thank you for your generous donation of $80.00 in support of our activities.
> In honour of our 25th anniversary, would you consider increasing your donation to $100 and become a member of our Silver Supporters? As a member of Silver Supporters, you receive these benefits…?
> Thank you very much for your support.
> Sincerely,
>
> Arleen Cornell
> Executive Director
> --
> Would you like to continue supporting our Agency?
> O $________$100.00 to $249.00 Silver Supporter
> O $________$250.00 to $499.00 Gold Supporter
> O $________$500.00 to $749.00 Platinum Supporter
> O $________$750.00 + Super Supporter
> O $________ Other Amount

Second Example

Vilma gave $270 last year. Because she gave between $250 and $399 (and not between $400 and $499 which would move her up to the next giving level), the template moves her up by 10% only and specifies a suggested amount.

> Dear Vilma,
> Thank you for your generous donation of $270.00 in support of our activities.
> In honour of our 25th anniversary celebration in June, 2005, would you consider donating $300.00?
> Thank you very much for your support.
> Sincerely,
>
> Arleen Cornell
> Executive Director

Would you like to continue supporting our Agency?

O $________$250.00 to $499.00 Gold Supporter

O $________$500.00 to $749.00 Platinum Supporter

O $________$750.00 + Super Supporter

O $________ Other Amount

Appendix B – Online Transactions

Introduction

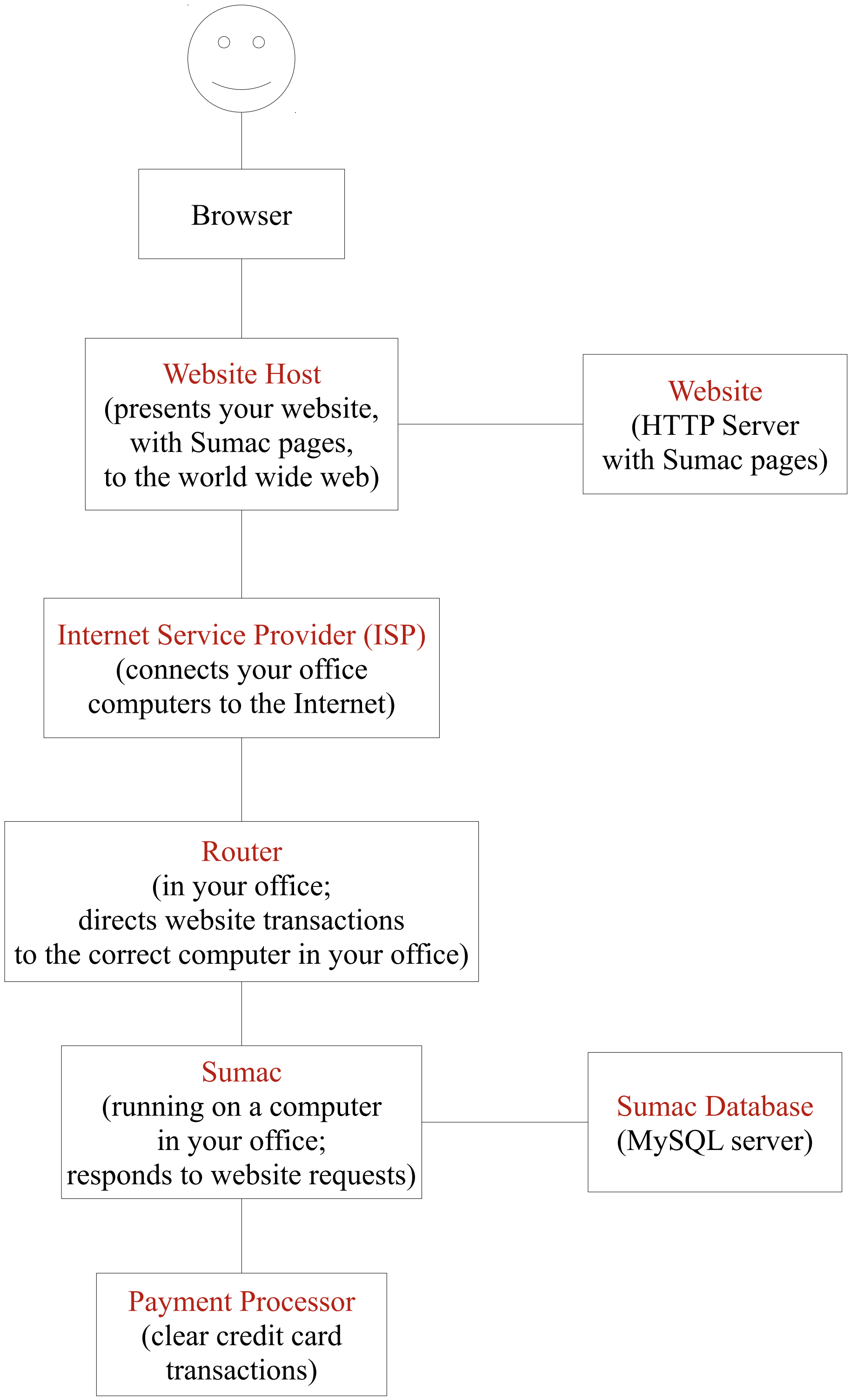
You can use Sumac to run a box office, manage donations and pledges, renew memberships, and update contact address information. These functions can also be extended to work from your website, letting your patrons, donors, and members do some of the work for you. You may choose to provide any or all of this functionality through your website.

Function	*What Works Online*
Address Update	Contacts can enter new mail and email address information.
Course Registration	Students (or people related to them) can choose courses from a course catalog, register and pay for courses, view a summary of outcomes, and view financial information
Directory	Display a searchable directory of whatever content you want to show.
Donations2, Pledges	This donations package handles donations and pledges on a single page. Contacts can make a recurring gift on your website. This is recorded in Sumac as a Pledge, which you can then process on a monthly basis.
Forms	Forms can be filled out in the context of other modules (e.g. during course registration) on your website. However, if you want to direct people to just enter their contact information and fill out a single form, this module can handle that.
Memberships	People can sign up to become members. You can also send a member a link to your website that enables a current member to renew his membership and pay for it.
Sign Up	You can have a page on your website where people can add themselves to your database and specify their communication preferences.
Ticketing	Complete online box office. Patrons can choose events, select tickets at different price points, choose seating, and pay for them.

Connecting a website to a pre-existing database requires that you do a lot of little things to make it all work. This chapter provides step-by-step instructions.

Overview: The Pieces

This picture shows how the pieces fit together. The next page contains a description of each of these pieces.



User

At the top of the diagram is a person using his browser to connect to your website.

Website Host

This Website Host computer holds the information that constitutes your website. It responds to clicks and keystrokes in a browser and sends appropriate pages back to the user's browser.

Website

Your website consists of pages of data that reside on the Website Host computer. In order to integrate your website with Sumac, some pages (provided by Sumac) must be added to your website.

Internet Service Provider (ISP)

Your Internet Service Provider (ISP) connects your office to the Internet. They are in the picture because you may need to get them to assign your office a static IP address, so that your website will know where, on the Internet, your office is, and how to connect to it.

Router

When your website requires information from your Sumac database, it sends a message to Sumac. Sumac is running on a computer in your office. You need to configure the Router in your office so that transactions coming from your website are sent to the correct computer within your office network.

Sumac

The new pages added to your website need to send information to and from your Sumac database. To do this, the website sends messages to Sumac, which is running on a computer in your office. This copy of Sumac responds to website requests by getting data from the Sumac database, processing payments, and storing information into the Sumac database.

Sumac Database

This is the MySQL database residing on a server computer (or at least a computer that is acting as a server). It may be in your office or, if you have Sumac Online service, it may be on a remote server accessed over the Internet.

Payment Processor (serving payment transactions)

When Sumac needs to clear a credit card transaction, it sends information to a payment processor's server, which in turn connects to the VISA, MasterCard, and other card networks (i.e. servers) to clear the transaction.

Suggested Roles

Several different organizations or people may be involved in connecting your website to your Sumac database. Here are suggested roles. Of course, your organization may work quite differently, and it is possible that several of these roles are combined into one individual.

Computer Guy	The person who comes into the non-profit organization's offices and sets up networks, configures computers, and generally responds to questions like "We cannot connect to the server. What should we do?"
Internet Service Provider (ISP)	Connects your office to the Internet.
Non-Profit Organization	Staff at the non-profit organization whose website is being enhanced.
Sumac Staff	Technical support staff at Sumac can help with general support at all times. However, there are also a couple of tasks specifically assigned to them.
Website Designer	Designs the layout and appearance of your website.
Website Host	Holds the content of your website and connects it to the Internet.
Website Builder	Adds pages to your website. Configures and programs them so that they work properly.

Step 1: Set Up Payment Processing (two weeks)

Objective	Create an account with a payment processing organization so that Sumac can handle credit card payments for your website.
Roles Involved	Non-Profit Organization

Some of the website components need to process credit cards. They do this by sending a message to Sumac, with all the credit card details, and telling Sumac to process the credit card transaction. Sumac does this by sending the transaction to a payment processor – an organization that is connected to the major payment networks (e.g. American Express, MasterCard, Visa).

Sumac can integrate with several payment processors. They are listed at http://sumac.com/contact-us.

You need to contact one of these payment processors and set up a merchant account, telling them that you will be clearing transactions using Sumac. They will provide you with appropriate merchant identification and password information. You then need to enter it into your Sumac database.

What to Do

1. Go to the Sumac website to view a list of payment processing organizations that work with Sumac.
2. Negotiate the terms of a merchant account with one of them. Note that depending on your payment volume and your negotiation skills, there is flexibility in how your contract will be structured and the rates you will pay.
3. Once you have your account details, use the Utilities/Customize Database/Preferences/Payments command in the Sumac console, and follow

the instructions in the Payments chapter of this manual (see page 278 to enter the appropriate details into your Sumac database.

Step 1A: Set Up Payment Processing: Security Certificate

Step 9 (*Step 9: Make Web Pages Secure* on page 540) requires that you apply a security certificate to your web pages. It sometimes takes awhile to get a certificate, so you should start the process soon.

Objective	Get a certificate to make your payment pages secure.
Roles Involved	Website Host: provide a certificate

Pages where users enter payment information need to put into a secure part of your website, which is protected by a security certificate. You can get a security certificate of your own for this purpose, if you have not already received one, contact our support team at support@sumac.com..

What to Do

Determine the ways in which your Website Host can provide a security certificate. Choose the one most appropriate to your needs.

Step 2: Decide About Passwords (5 minutes)

Objective	Decide whether you want users of your website to enter passwords to connect to Sumac.
Roles Involved	Non-Profit Organization: make the decision

Identification of Users

The people who use your website and do transactions that are handled by Sumac may be donors, ticket buyers, members, or just general contacts. When one of these people uses your website, the website solicits a user ID and password. The user ID should be the person's email address. You can generate passwords for everyone in advance (see *Generate Passwords* on page 535), or let each user specify his or her own password.

Which Email Address

When a user of your website identifies her or himself by an email address, Sumac finds the appropriate contact record by looking for the specified email address in any of these fields:

- Residence Email
- Residence Email 2
- Business Email
- Business Email 2

If there is only one contact with the specified email address, then Sumac uses that contact.

Multiple Contacts With Same Email Address

If there are two or more contacts with the same email address, Sumac examines them, one at a time, to see if one of them has the password that was entered. If one of them has the specified password, then Sumac uses that contact record.

As soon as Sumac encounters a contact record that has both the correct email address and password, it stops looking, and uses that record. So if multiple contact records have exactly the same email address and password, Sumac randomly chooses one of them.

Passwords or Not?

When someone does Sumac transactions through your website, they identify themselves using their email address. If you want, Sumac can use just the email address, to identify the contact, but you also have the option of requiring a password.

Using just email addresses, without passwords, is more convenient for your users: they have less typing to do. For donations, for example, you want the user to type only the smallest possible amount of information.

However, there is a problem. When a user identifies himself or herself to your website, Sumac provides confirming information, perhaps just the name of the peson with the email: "Are you Jane Doe?". If a website user does not have to enter a password, then this information will be presented to anyone who knows the user's email address. Effectively, your website would be disclosing information about a user, possibly to someone who is not that user.

You need to trade off the use of passwords (a nuisance to legitimate users) against not using passwords (a possible security issue). You have basically three possible choices:

- Don't use passwords. We strongly recommend that you do not take this approach.
- Require passwords. Assign an initial password to each user. Note that you can inform the users in an email what their password is, and also send each user a link to a page on your website where the user can update his own password.
- Require passwords. Let each user choose his own password. This can be done one of two ways:
  (a) Let users tell you the password they want to use and you enter into the Sumac database, or
  (b) Let each user register themselves through the website and choose their own password at the same time. Note that this will result in duplicate contact records being created in your database, but these can easily be resolved because Sumac can merge duplicate records. The re-registration process may also give you useful address update information.

What to Do

If you are going to use passwords, follow these steps:

1. Create an extra field to hold the passwords. This field should be added to the contact records in your Sumac database.
2. Choose the Utilities/Customize Database/Lookup Lists command in the Sumac console. Click the Contacts area, then the Extra Fields list.
3. Click New to add a password field (there is an option to obscure it during entry, but we recommend that you not use this feature while you are testing and setting things up; in any event, it only applies to using Sumac directly, the passwords are always obscured during entry on the website)
4. After you create the extra field, quit and restart Sumac.
5. Choose the Utilities/Customize Database/Preferences command in the Sumac console. In the Website Integration tab, enter the name of the password field that you defined into the field labelled *What contact record field holds the online password*.

6. If you have chosen to create a password for each contact, the next Step explains how to do this.

Step 3: Generate Passwords (15 minutes)

Objective	Assign a password to each contact in your database
Roles Involved	Non-Profit Organization: create passwords

If, in the previous step, you decided that you will assign passwords to each contact in the database, here is a procedure for generating the passwords. This procedure creates a password for each CONTACT, forming the password from last names and ID numbers.

What to Do

1. In the CONTACTS list, search to find the CONTACTS for whom you want to create passwords. Then click Export or Print. Export to a text file the CONTACT'S ID numbers and last names.
2. Click Utilities/Import/Import Workspace in the Sumac Console to open the file that was just created.
3. Click to select the column of IDs, and click Duplicate Column, creating a copy of the IDs.
4. If necessary, move columns left or right so that one of the CONTACT ID columns is immediately to the right of the column of last names.
5. Click to select the Last Name column and the column of IDs immediately to its right.
6. Click Append Columns to append the last names and IDs together. If you want to separate the names and IDs by a special character (e.g. Smith-123, Smith 123, Smith#123), enter the special character.
7. If you want to adjust the case of the alphabetic characters in the appended columns, perhaps to force them to be all lower case, then click to select the column to be changed, and click the Change Case button.
8. You now have a file with two columns: contact IDs in one column, and passwords in the other column. Click Save As to save the new file. Click to close the Import Workspace window.
9. Click Utilities/Import/Import in the Sumac Console. Click to indicate that you are importing CONTACTS. Click to indicate you are updating, not adding CONTACTS. Choose the file that was saved in the previous step.
10. Click to select the contact IDs column. In the top left corner of the window, choose Contact ID from the menu, indicating that contact records are being identified by their IDs.
11. From the list of fields on the left, drag the Password field and drop it on the column of passwords.
12. Click the checkbox to tell Sumac to Exclude the row of titles.
13. Click Validate. There should be no errors.
14. Click Import. Now the patrons' CONTACT records have passwords in their password fields. You can email them to tell them about their passwords.

Step 4: Choose the Port for Incoming Transactions (5 minutes)

Hint: If you use the Sumac Connect service, omit this step.

Objective	Make sure that traffic coming from the website will be directed to the computer in your office that runs Sumac, and responds to website requests.
Roles Involved	Computer Guy: Configure the Router Website Builder

What to Do

1. Usually you can just pick port 80, and everything will work fine. You specify the port in Utilities/Customize Database/Preferences/Website Integration.
2. If another computer on your network is serving incoming traffic on port 80, then choose another port.
3. If the computer running Sumac and responding to the website is a Macintosh or Linux machine, then you will need to choose a port that is greater than 1024. Ports less than 1024 are reserved for use by the operating system on these computers.
4. When choosing an alternative port, make sure that your Website Host allows outgoing traffic on the chosen port.
5. Note that you can usually have traffic coming in to your office on one port (e.g. 80), but direct it to another port on the computer running Sumac. Most routers can perform this re-direction from an external port number to a different port number on the internal network.

Step 5: Designate a Computer To Run Sumac (two hours)

Hint: If you use the Sumac Connect service, omit this step.

Objective	Decide which computer will run Sumac and respond to requests from your website.
Roles Involved	Non-Profit Organization: pick an appropriate computer Computer Guy: help out as required

When your website needs to get information from or save information into your Sumac database, it will send a request to Sumac. For this to work, Sumac must always be running on a computer.

What to Do

1. One of your computers needs to be designated to run Sumac at all times, so that Sumac can provide services (act as a server) to your website. Often the best computer for this is the one that already acts as the database server, but it doesn't have to be this one.
2. It is probably a good idea to get an uninterruptible power supply (UPS) to help this computer stay up and running through power failures.
3. Make sure the chosen computer has sufficient capacity to handle the transactions. The server needs to be able to handle the extra transactions coming from the web. A typical Sumac application will put very little demand on the server, but if the server is already heavily loaded, you may need to consider this issue.
4. Make sure that the connection between the server and the Internet is fast enough to provide good response to transactions from online patrons. If the computer running Sumac is connected to the Internet by a slow link,

then performance of your website will suffer as the website tries to get data from Sumac.

5. Ensure it runs. The computer managing your database and the computer running Sumac and responding to the website (these may be the same computer) must be running. So if they are configured to shut down on weekends, or go to sleep after two hours of idle time, or for operating system upgrades, or for a backup at midnight on Thursday, you need to reconfigure so this down time does not happen.

Step 6: Static External IP Address (2 hours)

Hint: If you use the Sumac Connect service, omit this step.

Objective	Enable your website to find your office computers, so that the website will be able to communicate with the designated computer in your office.
Roles Involved	Non-Profit Organization Computer Guy Internet Service Provider (ISP)

When you want to connect your website to your Sumac database, the website needs to be able to connect to Sumac so that Sumac, in turn, can get data from your database or add data to your database. For example, if someone makes a donation on your website, the website needs to be able to tell Sumac about the donation, then Sumac can process the payment, save the donation details into the database, and send an email acknowledging the donation.

In order for your website to connect to Sumac in your office, the website needs to know the IP address of the office. An IP address is four numbers separated by periods, like this: 12.34.56.78. These numbers identify computers connected to the Internet.

IP numbers can be static or dynamic. A static IP address never changes. So if your Internet Service Provider (ISP) has assigned you a static IP address, then your office always has the same address. This makes it easy for your website to refer to your office – the website can just use the IP address.

However, most offices have dynamic IP addresses. This means that every time your communications equipment is reset you are assigned a new IP address. This creates a problem for your website, since it will not know what the office IP address is, and so will not be able to connect to Sumac in the office.

Solution 1: Static IP Address

One possible solution is to get your ISP to assign a static IP address to your office. This eliminates the whole problem caused by dynamic IP addresses. The down side of this solution is that ISPs charge for static IP addresses. It may be that they charge such a small amount, that you will be happy to go with this solution.

Solution 2: Register Your Own Name + Dynamic DNS

If you cannot get a static IP address at an acceptable price, another approach would be to register a domain name and dynamically update the Domain Name Server (DNS) for that domain name to point to your office. A DNS is just a computer on the Internet which answers the question, "What is the IP address for this domain?" So, for example, if you ask a DNS for the address of google.com, you will probably get an answer like: 74.125.226.80.

If your site is MyCharity.org, you could register a domain name like MyCharityOffice.com, and tell a DNS the IP address for that domain name. Note that because your IP address is dynamic, you need a DNS that can handle regular updates: a Dynamic DNS. The updates are performed by a program that you run on a computer in your office; it regularly checks its IP address and, if there is a change, informs the Dynamic DNS.

Here are some examples of this type of DNS service: dlinkddns.com, dyndns.com, no-ip.com, zoneedit.com. Some of these are free.

By the way, often registrars – the organizations where you register your domain name – can also provide free Dynamic DNS services.

Solution 3: Use A Free Name

This solution is a lot like Solution 2, except that instead of registering your own name (which costs about $10 per year), you can use a free name provided by the Dynamic DNS provider. For example, no-ip.com will provide you with names you can use and provide the Dynamic DNS service, all for free.

The Problem With Solutions 2 and 3

The only problem with Dynamic DNS services is time delays. There is a delay between the time you update your IP address with the Dynamic DNS and the time when the rest of the Internet becomes aware of the change. This delay may be a few seconds to many minutes. During this delay, the DNS is incorrect, and anyone going a domain name will be told the wrong IP address.

If a delay of 10 minutes, during which your website won't work correctly, is acceptable, then there is no problem at all. If, however, it is imperative that your website be up as much as possible, this consideration may force you to get a static IP address assigned to your office.

The other factor to consider is just how often does your IP address actually change. Even though, in theory, your dynamic IP address may change, in practice often an ISP assigns you a number and that number stays unchanged until your reset your modem. If this happens rarely, then a 10 minute delay from the DNS will not matter since it happens so rarely.

What to Do

1. Pick one of the three solutions described above.
2. Implement the chosen solution.

Step 7: Configure Router (10 minutes)

Hint: If you use the Sumac Connect service, omit this step.

Objective	Tell the router in your office to send transactions from your website to the computer which is running Sumac and responding to website transactions.
Roles Involved	Computer Guy

Requests coming from the website need to be sent to the Sumac Transaction Server computer. Configure your office network's router to allow requests coming from the website (usually on port 80, on Macintosh computers 8080 often works), and to route them to the designated computer that runs Sumac.

What to Do

1. Make sure that the computer running Sumac and responding to website transactions has a *static* internal IP address (probably something like 192.168.x.y).
2. Most routers provide a DHCP service which automatically assigns internal IP addresses for computers that are added to the network. You need to tell the router that its DHCP service should not assign numbers that will conflict with the one you have given the computer running Sumac. For example if that computer was assigned 192.168.1.100, you might tell the router to use numbers in the range 192.168.1.50 to 192.168.1.99.
3. Tell the router that traffic coming in on the port chosen in a preceding Step should be sent to designated computer that was assigned a static IP address above.

Step 8: Add Sumac Pages To Your Website (1 hour)

Objective	Put the Sumac pages on your website and create links to them.
Roles Involved	Sumac: provide the pages Website Builder: put the pages on the website

What to Do

1. The provided Sumac pages are all written with PHP 5.2. Make sure that your website can handle PHP 5.2. You can get these pages by sending an email to info@sumac.com.
2. Put the pages in an appropriate folder on your website.
3. Add a link from your current website pages. The link needs to run sumac_start_new_session.php, and tell it how you want to start. Specify the package parameter to indicate the first window that should be displayed when a user clicks the link on your website. This link:
   `http://myWebsite.org/sumac/sumac_start_new_session.php?package=donation`
   launches the pages and starts a donation. For further information about where the online packages start, read *Starting Point* on page 574.

In the link above:

Link Component	*Explanation*
`myWebsite.org`	Your website.
`sumac`	The folder holding the Sumac website integration pages.
`sumac_start_new_session.php`	The first Sumac module to run.
`package=`	Indicates that you are specifying which website integration function should appear first.
`donation`	Your choice of the first function to appear.

Note that each link may also specify values which over-ride values contained in the *sumac_parameter.settings* file. For details on the parameters allowed, see *Parameter File* on page 546.

If your Web Application is Membership renewals, you would typically send an email to each renewing member, giving them a link to your website as described above.

4. Verify the installation. You can run a script that is installed on the website itself. For details, see *Verify The Website Installation* on page 585

Step 9: Make Web Pages Secure (1 hour)

Hint: If you use the Sumac Connect service, omit this step.

Objective	Make sure that the pages where a user might enter credit card information protected by https instead of regular http.
Roles Involved	Website Host: provide a certificate Website Builder: arrange the pages so that they are in the secure part of the website

Pages on which a user enters payment information need to put into a secure part of your website, which is protected by a security certificate. You can get a security certificate of your own for this purpose, but it is usually much more cost effective to share a certificate provided by your Website Host.

What to Do

1. Determine the ways in which your Website Host can provide a security certificate. Choose the one most appropriate to your needs. You may have done this in Step 1A above.
2. Ensure that the Sumac pages are in a secure part of your website, protected by the certificate.

Step 10: Public and Private Keys (1 hour)

Hint: If you use the Sumac Connect service, omit this step.

Objective	Protect information that is being sent from the website to Sumac.
Roles Involved	Website Builder: put the public key (.pem file) in the appropriate place on the website Non-Profit Organization: put the private key (.jks file) in the appropriate place on the designated computer that is running Sumac Sumac: generate and provide key files

The connection between your website and the designated computer that is running Sumac in your office needs to be secure, because the website passes payment information from the website to Sumac over this line. This is secured using a public key (pem file) on the server and a private key (jks file) on the designated computer.

Sumac (the organization, not the program) can provide you with appropriate files. The file on the website should be named sumac.pem and it resides in the certs folder on the website.

Non-Profit Organization, website programmer and Sumac

Admin preferences; key pair
tell Sumac about the private key

What to Do

1. Get a public and private key pair from a Sumac guru: support@sumac.-com
2. Put the public key in the appropriate place on your website.
3. Put the private key on the designated computer that will run Sumac and respond to requests from your website.

Step 11: Add Headers and Footers to the New Pages (1 day)

Objective	The Sumac pages are part of your website. You can give them the desired appearance by adding special header and footer pages.
Roles Involved	Website Designer: design the headers and footers Website Builder: put the headers and footers on the website Non-Profit Organization: approve the work

You need to create headers and footers that will make the Sumac pages visually fit in with the other pages on your website.

What to Do

1. Get the Website Designer to create the desired header and footer content.
2. Note that these files must not be complete html documents: they are going to be inserted into another html document. The samples that come with the default distribution package illustrate what you can do.
3. The Website Builder then puts this content into the *user* folder that is part of each group of Sumac pages. The file names – *top.htm*, *top.css*, *bottom.htm*, and *bottom.css* – must not be changed.

Step 12: Page Appearance and Function (1 day)

Objective	Refine the appearance and operation of the Sumac pages to make it work just the way you want it to.
Roles Involved	Non-Profit Organization: decides on appearance issues Website Builder: sets up the parameter file that makes the pages behave as desired Website Designer: provides input on colour, font, and other appearance issues

The Sumac-provided pages can be extensively configured regarding appearance (font, colour) and the text that they display. This configuration work is done by means of entries in the parameter file which tell the pages how to work. For more details see *Parameter File* on page 546.

What to Do

1. Discuss how you want pages to look.
2. Configure. For more information, see *Parameter File* on page 546.

Step 13: Set Up Sumac Database (5 minutes)

Objective	Get the Sumac database ready to serve transactions from the website.
Roles Involved	Non-Profit Organization

What to Do

New User

Define a new user in your Sumac database. This user can be named *website*. It is the user that will log on to Sumac on the designated computer, so that all transactions coming from the website will be seen as coming from this user.

Donations

Use the Lookup Lists command to specify which funds are supposed to be presented on the website.

Memberships

Use the Lookup Lists command to specify which membership types are supposed to be renewable on the website.

Ticketing

Configure the events that are going to be ticketed. You set up events for online ticketing in the same way you set them up for using Sumac Ticketing in house. For online ticketing, these additional considerations apply:

- If there are events you do not want to appear on your website, you can indicate this along with other details about the event.
- Similarly, you can indicate that certain discounts are not to be made available over the web, just locally.
- Define seat blocks for the event. Again, you need to do this for all ticketed events, but for online events there are two additional factors. If the event has open (general) seating, define only one seat block with the number of seats required. If the event has assigned seating, then you must specify the position of each seat block in the theatre, providing information needed to lay out the seats in the website view of the seats.

Step 14: Sumac Preferences (5 minutes)

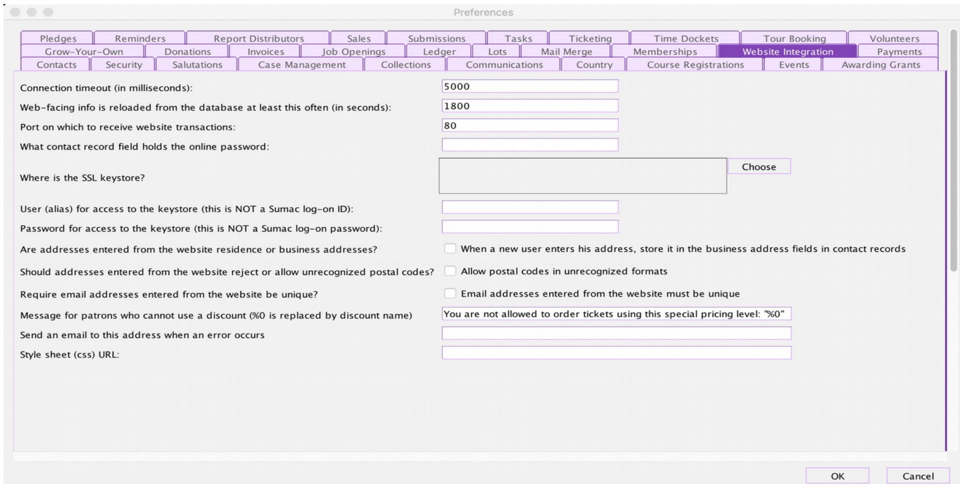
Objective	Set preferences for how Sumac's online transaction server should work.
Roles Involved	Non-Profit Organization: set the preferences

There are several options for how Sumac will provide services to your website.

What to Do

Website Integration Tab

Choose the Utilities/Customize Database/Preferences command in the Sumac console. Click the Website Integration tab.



After doing this, specify at least these fields.

1. Timeout (in milliseconds): Under normal circumstances, the default of 5000 works fine.
2. Specify how often you want Sumac to reload information from the database, to ensure that what is presented on the website is current. Note that you should not make this number too small: 1800 seconds, or 30 minutes) is usually a good value. If the number is too small, then Sumac starts to demand a much higher level of service from servers.
3. Click Choose to specify the location of the keystore, i.e. the .jks private key file (see Step 10 above).
4. Specify the user and password for access to the keystore.

Another checkbox that is often useful is the one that forces a contact email address to be unique so that the same person does not get entered into your database twice.

If you have contacts being added to your database from your website, you can click a check box to tell Sumac to allow postal code formats that it does not recognize. This enables people from other countries to be added to your database via your website.

Finally, you are able to apply a Cascading Style Sheet (CSS) to your Sumac web pages in order to change the appearance of these pages. If you have created a style sheet, then put the URL into the Style sheet (css) URL: field.

Other Tabs

Note that other tabs contain information about how the Online Transaction Server should handle their particular types of information.

Step 15: Tell Sumac To Serve Your Website (1 minute)

Hint: If you use the Sumac Connect service, omit this step.

Objective	Make Sumac, running on the designated computer, respond to requests from your website.
Roles Involved	Non-Profit Organization: run Sumac

Once everything is set up, you start Sumac's online transaction server by choosing Utilities/Website/Start Transaction Server in the Sumac Console. The transaction server shows a window in the bottom right corner of your computer screen. The window shows the most recent transaction it has received, and records counts of how many transactions of different types have been processed.

Over time, you may alter the events in your database, changing ticketing information. In order to keep current, the transaction server automatically reloads events every hour. This means that even if you change the list of events, the changes will automatically show up on your website.

When there is a new release of Sumac, you will need to manually quit Sumac on the server and restart it.

What to Do

1. Run Sumac on the designated computer that is serving transactions.
2. Log in to Sumac as the *website* user.
3. Choose Utilities/Website/Start Transaction Server in the Sumac Console.

Status Window

When Sumac is serving a website, it shows a window that counts transactions as they arrive. These include:

Request Organization	The number is updated whenever the website asks for initial information from the Sumac database. This request usually occurs when a website user starts a module.
Request Performance	A subset of Request Organization, counted whenever the website asks for information about theatre performances along with the organization. This happens when a person starts up the online ticketing.
Request Theatre	The number of times theatre information is requested. This is only used by very old versions of OTS.
Request Seat Sales	Counts when a website user clicks to choose seats from a particular performance (so the website will know which seats have been sold already and which are still available).
Request Extras	Counts when ticketing seats are chosen, and person is about to check out, website asks for extra surcharges and discounts to be added to a ticketing order.

Step 16: Tell Sumac to Automatically Restart (5 minutes)

Objective	Make sure that if the computer running Sumac should fail, that Sumac will start up again automatically when the computer is restarted.
Roles Involved	Computer Guy or Non-Profit Organization

If you use Sumac to serve transactions from your website, you need to deal with the possibility that the Sumac server computer may occasionally have to be restarted. When this occurs, you need to ensure that Sumac is started up, logged on, and that Utilities/Website/Start Transaction Server command is chosen automatically.

Use the facilities of your operating system to automatically start Sumac when your computer is started.

Use the Utilities/Website/Configure Default Log-on command in the Sumac Console on the computer that runs Sumac to serve transactions to the website. It asks for a user ID and password, and if you are using payment encryption keys it also asks for a password for a key. Enter the user ID and password defined above (see *New User* on page 542), and perhaps a payment key password. When you use this command, Sumac creates a file with the log-on ID and passwords. When Sumac starts, it looks for this file, uses the user ID and passwords contained therein to connect to the database, and automatically starts the web service.

Test to make sure this works. Restart the Sumac server computer and ensure that Sumac automatically starts up, logs on, and runs the online transaction server.

> Hint: If Sumac is configured to automatically log on, and a new release of Sumac runs and requires an update to the database, the update to the database will be performed automatically without asking your permission. This is perfectly okay under normal circumstances, but if the update to the database structure fails (an extremely rare occurrence usually only caused by serious network connectivity issues) then an error message window will be put on the screen and the auto-log-on will stop.

Step 17: Occasionally Check What Is Happening

When you start Sumac's Online Transaction Server, it displays a window with various numbers in it. Here is an explanation of them:

Number	*Significance*
Bad messages	The number of messages that were received but did not conform to the format of messages that should be received from the website. Possibly these were junk being received on the incoming port, if these messages are coming in frequently (the number was two or three per second) it could indicate someone is attacking you (attempted DDoS attack). Also, depending on timeout settings, these could be just timeouts on the communications.
Donation Attempts	Number of times a user clicks a button that opens the donation or pledge page.
Donation Starts	Number of times a user has filled out all the details for a donation or pledge.
Membership Attempts	Number of times a user logged in on the membership renewal page.
Membership Starts	Number of times a user renewed a membership.
Process Payment	Number of times a user attempted to process a credit card.
Request Extras	When a user clicks to add a ticket to an order, the website requests information about extra charges (taxes, delivery charges, etc.)

Number	*Significance*
Request Password By Email	Number of times a user clicked to recover his password by email.
Request Payment	Number of times a user has clicked to pay for a ticket order.
Request seat sales	The number of times that a user clicked an event to choose seats. When a user picks an event, the website sends a message to Sumac asking it for number of seats available, pricing, theatre layout (if there are assigned seating).
Request Theatre	The number of times a person has clicked to start the whole ticketing process. When a user does this, the website sends a message to Sumac asking for information about the theatre, and available ticketed events.
Update User	The number of times a user has updated his contact details.
Validate Login	Number of times a user has entered an ID (email address) and password to log in.

Parameter File

Two Parameter Files

The Sumac website integration package has two parameter files that reside in the user sub-folder:

sumac_parameter.settings	The parameters in this settings file define the appearance and general operation of the online modules. You always need to supply the source setting, but other parameters are optional.
sumac_strings.settings	This file contains all the text that is used in the web pages. See the next section for instructions on updating this file.

Alternate User Folder

The starting URL can tell the online modules to get all user files from a specific subfolder. Use the *userfolder* to specify an alternative user folder.

Alternate Certs Folder

Use the parameter *certsfolder* to override usual folder name for the encryption/decryption certificate (.pem file).

Multiple Parameter Files

The two parameter files – sumac_parameter.settings and sumac_strings.settings – control almost every aspect of the web-based presentation of Sumac. But what if you want the website to look differently, depending on context? For example:

- you can have the same website support multiple languages by providing different strings files in different languages
- you can have many different signup2 page presented by one website.

You can accomplish this by specifying, in the link that launches the online code, an alternative for one or both of these two parameter files.

The parameters are *strings=xxx* and *params=xxx*. In both cases, *xxx* must be the name of the file and the file must reside in the user folder.

Updating sumac_strings.settings File

Overview

The sumac_strings.settings file contains lines that look like this:

```
AL2|ButtonRetrievePassword|Email Password|
```

Each line has three components, each terminated by a vertical line |.

- an identifier used by the software:
  `AL2`
- a descriptive name for the string:
  `ButtonRetrievePassword`
- the actual text:
  `Email Password`

You must never change the first two things. You may edit the third component to change the text in the user interface of the website pages.

Figuring Out What String To Change

Sometimes you see some text on a web page and are not sure exactly which string (from sumac_strings.settings) is being displayed. Put the *stringids* parameter in the starting URL and the ID of every string will be displayed. Note that this is intended for debugging and testing: it will make the appearance of the pages rather strange.

After Online Version 5.6.5

In versions 5.6.5 and later of the online components, there are two files named sumac_strings.settings:

- The first resides in the main top-level folder. It contains all strings that are used in the web pages. You should *never* change this file. As new versions of the online components are released, this file may evolve with additions and changes.
- The second sumac_strings.settings file is in the user folder. Put your changes into this file (copy a line from the main sumac_strings.settings file, and paste the copy into this file, then change it to the desired text). Whenever Sumac looks for a piece of text to be displayed, it looks in this file first. If it doesn't find what it is looking for, then it looks in the sumac_strings.settings file that is in the top-level folder.

Before Online Version 5.6.5

The file sumac_strings.settings is fairly large and if you have made changes to it, applying your customizations to a new release of the sumac_strings.settings can be difficult. So there is a utility command to help you do this.

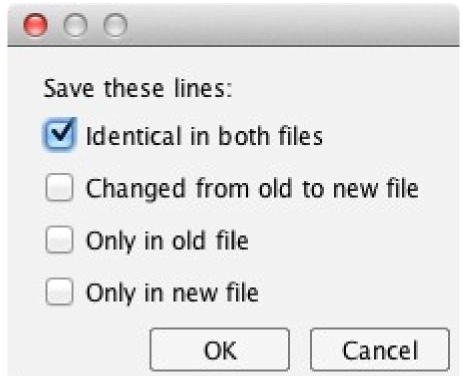
Choose Utilities/Website/Update Website Strings from the Sumac console window. You are asked for the old settings file (the one from a previous release of Sumac, which you have customized), and the new settings file (from a new release). Sumac analyzes the two files then shows you a list with two columns: the old and the new lines. Here is what is in the list:

Lines in both files, displayed in grey.

Lines that are in both files (have the same identifier at the start of the line) but are different in the two files. These are displayed in colour.

Lines only in the old file and lines only in the new file. These are black.

When you click OK to close the window, Sumac can create a new file. This dialog appears so that you can specify which lines you want in the new file:



Usually, to create a new parameter file with all your changes, you should click all four checkboxes, then click OK.

Syntax

This file contains settings, one per line. Each line has the keyword first and then the value bracketed between vertical bar | characters. If you put in no value (i.e. you have ||) the setting is ignored.

Don’t put spaces, new-lines or tabs between the | characters unless you want them to be part of the value.

> Hint: The standard installation of the Sumac website integration software includes a file named *sumac_parameter_settings.guide*. This file contains the most current descriptions of the parameters.

> Hint: a useful reference for HTML colours is the W3 Schools site http://www.w3schools.com/html/html_colornames.asp

Contact Field Identifiers

Contact-detail fields are identified by single letters according to the following list:

n	Name Prefix (e.g. *Mr.*, *Ms.*)
f	First Name
a	Address (both lines)
b	Apartment
t	City/Town
s	State/Province
z	Zip/Postal code
c	Country
p	Phone
m	Cell/Mobile Phone
x	none of the fields
w	Communication preference checkboxes (this is only supported in the Address Update and Signup pages)
o	Contact Source (see *Contact Sources* on page 605)
e	Email Address [always included and mandatory, only used for position]
d	Password [only used for position]
l	Last Name [always included and mandatory, only used for position]
j	Recognize-me-as Name
h	Language Choice
r	Receipts Preference (separately or annually)
g	Name of Organisation
u	User Type (individual or organisation)
x	specifies "none of the fields"

Contact Field Ordering and Layout

As Sumac lays out fields where a user enters personal details, it positions them in columns of an HTML table. You can adjust the order and layout of the fields where a contact enters personal details. This is done with parameters whose names end with *fieldorder*.

Order

If you want to change their order, put them in a different order in the *fieldorder* parameter.

New Row

If you want them to be on separate rows in the table, separate them by a slash character /.

Group In One Column

To group several parameters into a single column, put them in square brackets: [...].

Widen One Field

To extend a field across several columns, prefix it with a period for each additional column. For example, ..c spreads the country field across three columns.

Empty Column

You can add an empty column, for wider horizontal spacing, by inserting a minus sign -. For example, /p-m/ would put the phone and the cellphone fields in a row in columns 1 and 3.

Standard Presentation

The standard presentation of the fields is defined by this *fieldorder*:

```
[nfl]/a/t/s/z/c/p/m/e/d/o/g/r/u/w
```

Omitted Fields

If a field is specified in the *fieldorder* parameter, but it is omitted by an *omitfields* parameter, then the field becomes an empty column.

Over-riding Parameters in the Link

Most parameters will be specified in the parameter file. But you can use the link which launches the online module to override any particular value from the settings file. For example, your link for starting ticketing may look like this:

```
http://myWebsite.org/boxoffice/raots_start.php
```

But you can append parameters and their values to the link. Follow the link with a question mark (?) then a parameter name with and equal sign and the parameter's value, like this:

```
http://myWebsite.org/boxoffice/raots_start.php?source=12.34.56.78
```

If you need to specify more than one paramater, separate parameters by ampersands (&) like this:

```
http://myWebsite.org/boxoffice/raots_start.php?source=12.34.56.78&port=80
```

Hint: The values of parameters must still conform to the syntax for URLs, so special characters (including spaces) must be encoded with *%nn* syntax.

Generic Payments On Your Website

If you wish to be able to accept generic payments from your website, you can do this using the Donations pages. You just need to change some of the text. Here is what to do:

- ✔ Change the page title using the *title* or *titlem* parameters.
- ✔ Change the payment button label from *DONATE* to your preference, perhaps *SUBMIT*. Use the *paybutton* parameter to make this change.
- ✔ If you supply your own instructions for the payment page of the process, then you can include the button label in those instructions. The string *%0* formerly *&0*) embedded anywhere in the instruction text will be replaced with the button label at run time.
- ✔ If the payment should be for a fixed amount, you can specify that (probably in the URL rather than in the parameter file). If the amount to be paid is $50, set the *amounttopay* parameter like this: *&amounttopay=50* in the URL or *amounttopay*|*50*| in the parameter file.

Parameters

Not all parameters apply to all online modules. In the column labeled *Keyword*, there are codes which indicate the module(s) to which each setting applies:

A – Address Update

D – Donation
F – Forms
M – Membership Sign-up and Renewal
O – Online Directory
R – Course Registration
T – Ticketing

Parameters that are grey are obsolete. They define text that appears in the web pages. This text should be altered by editing the file *sumac_strings.settings* in the *user* folder of the website components.

Keyword	*Default Value*	*Description*
addcontact DT	D: If you are not in our database, please enter your information. Then click Submit. T: If this is the first time you have purchased tickets from us online, please enter your information. Then click Submit.	Text to act as instructions above the contact-details panel when a password is required. Any text (you can use in the text to force the start of a new line).
addorlogin DT	D: If you have already provided us with your contact information, just enter your email address and click Login. Otherwise please fill in the whole form including your email address and click Submit. T: If this is not the first time you have purchased tickets from us online, just enter your email address and click Login. Otherwise please fill in the whole form including your email address and click Submit.	Text to act as instructions above the combined login and contact-details panel when no password is required. Any text (you can use in the text to force the start of a new line).
allowhttp ADMRT	false	Sumac website modules should run under https, i.e. in a secure part of your website. If, for testing convenience, you want to run under http, you can set allowhttp to true.
badresponse ADMRT	Invalid HTTP or XML response from Sumac server	Text informing the user that the Sumac server has given an invalid response. Any text (you can use in the text to force the start of a new line).
bodycolour ADMRT	White	The colour of the background to all the pages. Any valid HTML colour (e.g. *Cornsilk* or *Burlywood* or a hex-coded RGB value (e.g. *#666666)*
connection ADMRT	Connection to Sumac server failed	Text informing the user that the attempted connection to the Sumac server has failed. Any text (you can use in the text to force the start of a new line).

Keyword	*Default Value*	*Description*
debug ADMRT		This keyword indicates that debugging information should be added to html pages. It can have one of these values: *rawxml*, *parsedxml*, *parameters*, *stringids* or *displayerrors*. *rawxml* and *parsedxml* include the XML data received from Sumac in the output to the browser. The *parsedxml* output is reformatted for readability. The *rawxml* output may confuse the browser and often doesn't display at all; but it is all present and correct in the page source, so by viewing the source one can see exactly what Sumac sent. If you specify *parameters*, then you will receive a list of the parameter values that will be used by the specific package, and whether the value is from a default, a file, or the link that launched the module. The *stringids* value tells Sumac to display the IDs of strings (from the sumac_strings.settings file) along with the strings themselves. This is useful if you are trying to change the text in the user interface. Note that this feature works only with the donation2 package. The *displayerrors* value causes the PHP code to report a variety of error and warning messages.
exitlogout	false	If this parameter is *false*, then exit screens have an OK button that does not log the user out. If this parameter is *true*, then exit screens have a Log out button that does log the user out.
fontsize ADMRT	normal	The fontsize for the text on all the pages. One of the *small*, *normal* or *big*.
fonttype ADMRT	sans-serif	The font family for the text on all the pages. Any valid font style (e.g. *serif*) or fontname (e.g. *Times*)
formflag0 F	No	This is what is displayed in a completed form for checkboxes that have *not* been checked.
formflag1 F	Yes	This is what is displayed in a completed form for checkboxes that have been checked.
login ADMRT	A: Enter your email address (the old one if it has changed) and your password. Then click Login. DMT: Enter your email address and password. Then click Login.	Text to act as instructions above the login panel when a password is required. Any text (you can use in the text to force the start of a new line).
loginwopw AM	M: If you are already a member, just enter your email address and click Login. Otherwise please fill in the whole form including your email address and click Submit. A: Enter your email address (the old one if it has changed). Then click Login.	Text to act as instructions above the login panel when no password is required. Any text (you can use in the text to force the start of a new line).

Keyword	*Default Value*	*Description*
mustfields ADT	fatszcp	A list of contact-detail fields that *must* to be supplied by the user as well as Email and Last Name. Any combination of the letters *fatszcpm* in any order. See Contact Field Identifiers on page 548 for meanings. Note that this parameter cannot be used in the URL, it must be in the parameter file.
nouserpw ADMRT	false	Suppress the use of passwords in the user login/identification process. Set to *true* to leave out passwords. Note that this parameter cannot be used in the URL, it must be in the parameter file.
omitfields DT		A list of contact-detail fields that are *not* to be requested from the donor. Any combination of the letters *fatszcpm* in any order. See *Contact Field Identifiers* on page 548 for meanings. Note that this parameter cannot be used in the URL, it must be in the parameter file.
othererror ADMRT	Procedure halted by system error	Text informing the user of any other fatal system error. Any text (you can use in the text to force the start of a new line).
password	If you have forgotten your password, enter your email address and click Email Password. Your password will be emailed to you. Then you can log-in.	Text to act as instructions above the forgotten-password panel on the login page. Any text (you can use in the text to force the start of a new line).
payment DMT	D: Enter payment information then click DONATE to authorize the payment. We will email a confirmation message. If you do not receive the email, or seem to have been disconnected, please call us. M: Enter payment information then click PAY to authorize the payment. We will email a confirmation message. If you do not receive the email, or seem to have been disconnected, please call us. T: Enter payment information then click PAY to authorize the payment. We will email a confirmation message. If you do not receive the email, or seem to have been disconnected, please call us.	Text to act as instructions above the payment panel on the final page. Any text (you can use in the text to force the start of a new line).
port ADMRT	80	The port on which the Sumac server is listening.
ppbgcolour DMT	White	The colour of the background to the payment panel on the final page. Any valid HTML colour (e.g. *crimson* or *Chartreuse*) or a hex-coded RGB value (e.g. *#7FFFD4*)

Keyword	Default Value	Description
source ADMRT		Address of the system running the Sumac server. An IP address (e.g. 12.34.56.78) or host name (e.g. myCharity.org)
textcolour ADMRT	Black	The colour of the text on all the pages. Any valid HTML colour (e.g. *blue* or *DarkSlateGray*) or a hex-coded RGB value (e.g. *#666666*)
title ADMRT	A: Updating your contact details D: Donation M: Membership Renewal T: Ticketing	Text to provide the major title for all the pages (extended by *unavailable* on the failure page).
titlecolour ADMRT	Black	The colour of the major title on all the pages. Any valid HTML colour (e.g. 'Pink') or a hex-coded RGB value (e.g. '#666666').
update A	Correct whichever details need changing then click Make Changes.	Text to act as instructions above the contact detail update panel on the final page. Any text (you can use in the text to force the start of a new line).
userdata ADMRT	name-of-website-where-PHP-code-executes	See discussion below.

Donations: Special Issues

Automatic Receipts

If you accept donations from your website, you can have Sumac automatically generate and email a receipt to the online donors. In order to do this, use Utilities/Customize Database/Preferences/Donations, and choose a template for generating a receipt. When Sumac receives a donation from your website, it automatically generates and emails the receipt using this template. Note that the template must be a PDF document.

Email Address Only

If you allow people to make donations by identifying themselves with just an email address (i.e. not also requiring a password). This minimizes the fields that a donor needs to enter in order to make a donation.

Team Fundraising

Instead of showing Funds in the Fund drop-down menu on your website, you can show contacts. If the contacts that show are the names of teams or perhaps the captains of teams, then donations which choose from the fund drop-down menu are soft credited to the particular contact that is chosen. Here is how to set this up:

- ✔ Use Utilities/Customize Database/Lookup Lists/Contact Types to define one or more contact types that identify which contacts should show in the Funds drop-down menu.
- ✔ Make sure that every contact in the database who should show in the Funds drop-down menu has one of the specific contact types.
- ✔ Put the IDs of the contact types in the fifth part of the userdata parameter. For more information, see *The userdata Parameter* on page 570.

Global Parameters for Several Packages

Specific parameters are available to do similar things for several packages. For example, there is a *c2omitfields* for course registration and a *d2omitfields* for donations.

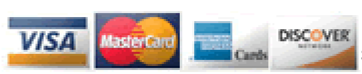
If you want to specify a default value for these similar parameters, you can use these global parameter settings.

Keyword	*Default Value*	*Description*
g2nouserpw	false	Note that this parameter cannot be used in the URL, it must be in the parameter file. The Course Registration package uses this in place of *mustfields*.
g2omitfields	now	A list of contact-detail fields to be omitted from the form used to enter a new contact. See *Contact Field Identifiers* on page 548 for meanings.
g2mustfields	fatszcp	A list of contact-detail fields that *must* to be supplied by the user as well as Email and Last Name. See *Contact Field Identifiers* on page 548 for meanings.
g2statesdd		If you want a website user to identify his state from a drop-down menu, give this parameter a value. See *States and Provinces* on page 580.

Parameter For All Payment Pages

Some payment processors require you to show credit card logos on your website payment pages. Sumac supports a parameter, *paycardlogo*. You can set this parameter to the URL of an image of credit card logos to be displayed on your website above the card-selection line in all the payment panels.

Here is a sample picture that you may find useful:


[8]

Parameters Just For Address Update

Keyword	*Default Value*	*Description*
u2nouserpw A	false	*true* means do not use passwords in the Address Update login and identification process, *false* means that passwords are required.

[8] taken from https://www.merchantequip.com/images/logos/visa-mc-amex-disc-179x30.gif

Parameters Just For Course Registration

Keyword	*Default Value*	*Description*
c2mustfields R	fatszcp	A list of contact-detail fields that *must* to be supplied by the user as well as Email and Last Name. Any combination of the letters *fatszcpm* in any order. See *Contact Field Identifiers* on page 548 for meanings. Note that this parameter cannot be used in the URL, it must be in the parameter file. The Course Registration package uses this in place of *mustfields*.
c2nouserpw R	false	*true* means do not use passwords in the Course Registration login and identification process, *false* means that passwords are required.
c2omitfields R	now	A list of contact-detail fields that are *not* to be requested from the website user. Any combination of the letters *fatszcpm* in any order. See *Contact Field Identifiers* on page 548 for meanings. Note that this parameter cannot be used in the URL, it must be in the parameter file. the Courses package uses this in place of 'omitfields'
c2paydonate R	false	Set this parameter to true if you want a field to allow optional donations as part of the payment process.
c2statesdd R		If you want a website user to identify his state from a drop-down menu, give this parameter a value. See *States and Provinces* on page 580.
singlereg R	false	The web components, from version 5.6.2 forward, allow students to register and pay for multiple courses at once. If you want to disable this behaviour, and allow only one registration at a time, set this parameter to *true*.

Parameters Just For Directories2 Pages

Keyword	*Default Value*	*Description*
dir2login		When that parameter is set to *required*, the new directories package will take a user through the login process before showing the search page. When the parameter is set to *optional*, the search page will have a Login link on it.

2. This adds support for a new parameter - 'dir2login'.

Parameters Just for Donation (Pledge) Pages

Hint: See the next section below for a description of the new-style Donation2 package.

This table shows parameters that are used only by donation (pledge) pages.

Those that are grey are obsolete. They define text that appears in the web pages. This text should be altered by editing the file *sumac_strings.settings* in the *user* folder of the website components.

Keyword	*Default Value*	*Description*
amounttopay D		The fixed amount of a single or monthly donation. It is a decimal currency amount with no currency symbol, e.g. *20* or *20.00* for twenty dollars.
combdon-pref D	once	When combining monthly and one-time donations, the choice of which to place first in the payment panel: *monthly*: present the recurring donation panel first *once*: present the single donation panel first
commem-form D	0	You may add an extra field into which a donor may enter additional information about the payment – perhaps a dedication. This keyword may be 0, 1, or 2: 0 means do not provide this extra field, and ignore commemtext1 and commem-text2 1 means use commemtext1 to define a prompt for the extra field, which will appear along with other fields about the donation 2 means to use both commemtext1 and commemtext2 to create a two-line prompt highlighting this dedication field
commem-text1 D	[if commemform is 1] Is this dedicated to someone? [if commemform is 2] Do you wish to dedicate this payment to someone special?	This is the first or only line prompting a donor to enter a dedication. See description of commemform above.
commem-text2 D	Please enter their name(s):	This is the optional second line prompting a donor to enter a dedication. See description of commemform above.
d1mustfields D	fatszcp	A list of contact-detail fields that *must* to be supplied by the user as well as Email and Last Name. Any combination of the letters *fatszcpm* in any order. See *Contact Field Identifiers* on page 548 for meanings. Note that this parameter cannot be used in the URL, it must be in the parameter file. The Donation package uses this in place of *mustfields*.
d1nouserpw D	false	*true* means do not use passwords in the Donation login and identification process, *false* means that passwords are required.

Keyword	*Default Value*	*Description*
d1omitfields D	now	A list of contact-detail fields that are *not* to be requested from the website user. Any combination of the letters *fatszcpm* in any order. See *Contact Field Identifiers* on page 548 for meanings. Note that this parameter cannot be used in the URL, it must be in the parameter file. The Donation package uses this in place of *omitfields*.
d1statesdd D		If you want a website user to identify his state from a drop-down menu, give this parameter a value. See *States and Provinces* on page 580.
frequency D	*once* (if no pledge days have been configured in Preferences) *combined* (if no pledge days have been configured in Preferences)	The option to solicit monthly (recurring pledge) donations, single (one-time) donations, or both. *once*: prompt for a single donation *monthly*: solicit a recurring monthly donation *combined*: present a page that solicits either a single or recurring donation.
paybutton D	DONATE	The label for the button that submits the donation. It can contain any text, preferably a single word.
sepmontext D	false	Set to true to select separate instructions and button-label for the monthly donation. Before version 5.1.2, the top instructions and the DONATE button were sourced from the same place. If this is *true*, monthly donation instructions will be string DI11 and button label will be DL2.
titlem D	Monthly Donation	Text to provide the major title for all the pages for Monthly Donations (extended by *unavailable* on the failure page). Only used by D with frequency set to *monthly*.

Parameters Just For Donation2 (Pledges) Pages

This package is invoked with *package=donation2* in the start-up link.

Field Labels

The following fields are optional and, by default, are *not* displayed. You can cause them to be displayed by specifying a label for the field, in the sumac_strings.settings file in the user folder.

String Label	*Field*
D2F6	Dedication. The text entered by the user is put into the *In Honour Of Note* field in the donation record.
D2F8	Notes. The text entered by the user is put into the *Notes* field in the donation record.
D2F9	Recognition. The text entered by the user is put into the *Donor Recognition* field in the donation record.

Parameters

Keyword	*Default Value*	*Description*
d2fixedamt		The fixed amount of a single or monthly donation. It is a decimal currency amount with no currency symbol, e.g. *20* or *20.00* for twenty dollars.
d2frequency	*once* (if no pledge days have been configured in Preferences) *combined* (if no pledge days have been configured in Preferences)	The option to solicit monthly (recurring pledge) donations, single (one-time) donations, or both. *once*: prompt for a single donation *monthly*: solicit a recurring monthly donation *combined*: present a page that solicits either a single or recurring donation.
d2fundreqd	false	Set this parameter to *true* to require the user to choose a fund for the donation or pledge.
d2omitfields	now	A list of contact-detail fields that are *not* to be requested from the donor. Any combination of the letters *fatszcpm* in any order. See *Contact Field Identifiers* on page 548 for meanings. Note that this parameter cannot be used in the URL, it must be in the parameter file.
d2mustfields	fatszcp	A list of contact-detail fields that *must* to be supplied by the user as well as Email and Last Name. Any combination of the letters *fatszcpm* in any order. See *Contact Field Identifiers* on page 548 for meanings. Note that this parameter cannot be used in the URL, it must be in the parameter file.
d2nouserpw	false	Suppress the use of passwords in the user login/identification process. Set to *true* to leave out passwords. Note that this parameter cannot be used in the URL, it must be in the parameter file.
d2amounts		This parameter allows you to specify suggested donation amounts (separated by semi-colons) for the user to choose between. *The d2fixedamt* parameter takes precedence over *d2amounts*. If *d2-fixedamt* is set, the page will be the Fixed Donation screen regardless of the setting of *d2amounts*.
d2nologin	false	Set this parameter to *true* to force your donors to provide their name-and-address details but doesn't require a password
d2statesdd		Set this parameter to a list of states (separated by semi-colons) to allow users to choose a home state/province from a drop-down menu.

Keyword	Default Value	Description
d2asnavlnk	false	Set this parameter to true if you want Donation buttons in the navigation bar to connect to the new-style Donation2 package instead of the old-style Donation package.
d2fundkey		Set this parameter to a searching key for funds. Only the funds that have this key will be displayed to a user.
d2deffund		Set this parameter to the ID of the particular fund that is to be pre-selected in the dropdown choice of funds. The parameter should be the numeric value of the fund's ID as shown in Sumac.

Please Wait

After the user clicks the Donate button in the Donation2 page, a "wait a moment" window is displayed while the payment is sent to Sumac and processed. If you want to suppress this feature, add the following lines to the over_sumac_donation2.css file:

```
/* reverse the show and hide meanings so that the
please-wait cover page never appears */
div.sumac_show_coverpage { display:none; }
div.sumac_hide_mainpage   { display:block; }
```

Parameters Just For Single Form Entry

This package is invoked with *package=singleform2* in the start-up link.

Keyword	Default Value	Description
f2omitfields	now	A list of contact-detail fields that are *not* to be requested from the website user. Any combination of the letters *fatszcpm* in any order. See *Contact Field Identifiers* on page 548 for meanings. Note that this parameter cannot be used in the URL, it must be in the parameter file.
f2mustfields	fatszcp	A list of contact-detail fields that *must* to be supplied by the user as well as Email and Last Name. Any combination of the letters *fatszcpm* in any order. See *Contact Field Identifiers* on page 548 for meanings. Note that this parameter cannot be used in the URL, it must be in the parameter file.
f2nouserpw	false	Suppress the use of passwords in the user login/identification process. Set to *true* to leave out passwords. Note that this parameter cannot be used in the URL, it must be in the parameter file.
f2statesdd		Set this parameter to a list of states (separated by semi-colons) to allow users to choose a home state/province from a drop-down menu.

Keyword	*Default Value*	*Description*
formname		The name of the form that you want the user to fill out. Note that this parameter must be used in the start-up link URL, it cannot be in the parameter file.

Parameters Just For Membership Pages

This table shows parameters that are used only by ticketing pages.

Those that are grey are obsolete. They define text that appears in the web pages. This text should be altered by editing the file *sumac_strings.settings* in the *user* folder of the website components.

Keyword	*Default Value*	*Description*
emailaddress M		The email address of the member being renewed. Note that this is more likely to be used in the link than in the parameter file.
m2must-fields M	fatszcp	A list of contact-detail fields that *must* to be supplied by the user as well as Email and Last Name. Any combination of the letters *fatszcpm* in any order. See *Contact Field Identifiers* on page 548 for meanings. Note that this parameter cannot be used in the URL, it must be in the parameter file. The Membership package uses this in place of *mustfields*.
m2nouserpw M	false	*true* means do not use passwords in the Membership login and identification process, *false* means that passwords are required.
m2omit-fields M	now	A list of contact-detail fields that are *not* to be requested from the donor. Any combination of the letters *fatszcpm* in any order. See *Contact Field Identifiers* on page 548 for meanings. Note that this parameter cannot be used in the URL, it must be in the parameter file. The Membership package uses this in place of *omitfields*
m2statesdd M		If you want a website user to identify his state from a drop-down menu, give this parameter a value. See *States and Provinces* on page 580.
m2paydo-nate M	false	Set this parameter to true if you want a field to allow optional donations as part of the membership new and renewal process.
norenew M	Unfortunately we are not able to offer you a renewal plan online at present. Please call us for more information.	Text to act as instructions above the membership renewal panel on the final page when no plans are available. Any text (you can use in the text to force the start of a new line).

Keyword	Default Value	Description
optnatext M	N/A	The text that displays for a membership optional extra charge that is not applicable to a particular membership type
renew M	Click to select the membership plan you prefer. Then enter payment information and click PAY to authorize the payment. We will email a confirmation message. If you do not receive the email, or seem to have been disconnected, please call us.	Text to act as instructions above the membership renewal panel on the final page when there is a choice of plans. Any text (you can use in the text to force the start of a new line).

Parameters Just For Signup Pages

This package is invoked with *package=signup2* in the start-up link. It allows a person to add themselves to your Sumac database and specify their communication preferences.

Keyword	Default Value	Description
s2omitfields	now	A list of contact-detail fields that are *not* to be requested from the donor. Any combination of the letters *fatszcpmw* in any order. See *Contact Field Identifiers* on page 548 for meanings. Note that this parameter cannot be used in the URL, it must be in the parameter file.
s2mustfields	fatszcpw	A list of contact-detail fields that *must* to be supplied by the user as well as Email and Last Name. Any combination of the letters *fatszcpmw* in any order. See *Contact Field Identifiers* on page 548 for meanings. Note that this parameter cannot be used in the URL, it must be in the parameter file.
s2nouserpw	false	Suppress the use of passwords in the user login/identification process. Set to *true* to leave out passwords. Note that this parameter cannot be used in the URL, it must be in the parameter file.
s2statesdd		Set this parameter to a list of states (separated by semi-colons) to allow users to choose a home state/province from a drop-down menu.

Parameters Just For Ticketing Pages

This table shows parameters that are used only by ticketing pages.

Those that are grey are obsolete. They define text that appears in the web pages. This text should be altered by editing the file *sumac_strings.settings* in the *user* folder of the website components.

Keyword	*Default Value*	*Description*
chosentext1 T	When you have chosen all you want for this event click %0	Text to act as instructions for what a user should do after choosing tickets for an event when there is only one event available. This parameter may be any text. The text "%0" gets replaced by the label of the Check Out link.
chosentext2 T	When you have chosen all you want for this event click %0 or %1	Text to act as instructions for what a user should do after choosing tickets for an event when there other events available. This parameter may be any text. The text "%0" gets replaced by the label of the Check Out link, and '"%1" gets replaced by the label of the Event link.
detailtall T	400	A number which gives the height in pixels of the frame in which theatre event details are displayed.
detailwide T	600	A number which gives the width in pixels of the frame in which theatre event details are displayed.
etbgcolour T	Khaki	The colour of the background to the event theatre layout and the event title for general admission. Any valid HTML colour (e.g. *Khaki* or a hex-coded RGB value (e.g. *#FFFF00*)
incpaynote T	false	Set this to true if you want the ticket-buyer to have the opportunity to enter an additional note (e.g. who is coming with you to the event). See keyword paynotetext.
navbgfilext T	jpg	The file extension/type of the background images for the navigation bars. *jpg* and *gif* are will work; others may not.
navbgfolder T		The subfolder of the PHP folder in which the background images for the navigation bars are stored. Specify any existing subfolder, such as user or user/images/ Note the use of forward slashes and final slash.
ordernd T	Please click ORDER to place the order. We will email a confirmation message. If you do not receive the email, or seem to have been disconnected, please call us.	Displayed when a user has already identified himself for an order whose tickets cost nothing.
order T	Complete the ordering information then click ORDER to place the order. We will email a confirmation message. If you do not receive the email, or seem to have been disconnected, please call us.	Displayed when a user must enter his contact information for an order whose tickets cost nothing.
paynotetext T	Enter additional notes for this order:	Text to prompt a ticket-buyer to enter an additional note about the order (e.g. who is coming with you to the event). See keyword incpaynote.

Keyword	*Default Value*	*Description*
sbavcolour T	White	The colour of the background of two fields that show purchased tickets. Any valid HTML colour (e.g. *crimson* or *Chartreuse*) or a hex-coded RGB value (e.g. *#7FFFD4*)
sbbgcolour T	wheat	the colour of the background to the shopping basket ('What you are buying') panel on all pages. Any valid HTML colour (e.g. *wheat* or *Lavender*) or a hex-coded RGB value (e.g. *#FFFF00*)
t2mustfields T	fatszcp	A list of contact-detail fields that *must* to be supplied by the user as well as Email and Last Name. Any combination of the letters *fatszcpm* in any order. See *Contact Field Identifiers* on page 548 for meanings. Note that this parameter cannot be used in the URL, it must be in the parameter file. The Ticketing package uses this in place of *mustfields*.
t2nouserpw T	false	*true* means do not use passwords in the Ticketing login and identification process, *false* means that passwords are required.
t2omitfields T	now	A list of contact-detail fields that are *not* to be requested from the website user. Any combination of the letters *fatszcpm* in any order. See *Contact Field Identifiers* on page 548 for meanings. Note that this parameter cannot be used in the URL, it must be in the parameter file. The Ticketing package uses this in place of *omitfields*.
t2paydonate T	false	Set this parameter to true if you want a field to allow optional donations as part of the ticket purchase process.
t2statesdd T		If you want a website user to identify his state from a drop-down menu, give this parameter a value. See *States and Provinces* on page 580.

Parameters for Volunteer Sign-up Pages

Field Labels

The following fields are optional and, by default, are *not* displayed. You can cause them to be displayed by specifying a label for the field, in the sumac_strings.settings file in the user folder.

String Label	*Field*
VPI1	This variable contains usage instructions for the main volunteer sign-up page.

Parameters

Keyword	*Default Value*	*Description*
vpavfrom	std18x30	This parameter is an identifier for a dropdown list of start times-of-day when a volunteer is available. It can be one of these built-in pre-set lists of times: std18x30 std24x30 or the filename or URL of a user-supplied list. To create your own list, look at one of the Sumac dropdown files in the /html subfolder.
vpavto	std18x30	This parameter is an identifier for a dropdown list of end times-of-day when a volunteer is available. It can be one of these built-in pre-set lists of times: std18x30 std24x30 or the filename or URL of a user-supplied list. To create your own list, look at one of the Sumac dropdown files in the /html subfolder.
vpavdays		This parameter is a coded representation of the days of the week from which a volunteer can specify his availability. The string consists of any of the digits *1* through *7* in any order, where 1 is Monday. For example,*1237* meaning Monday, Tuesday, Wednesday, and Sunday.
vpfieldorder	|f/l/h/e/v/u/r/q/a/w/o|	See *Contact Field Ordering and Layout* on page 549
vpomitfields	tszcpmgjnbhur	A list of contact-detail fields that are *not* to be requested from the donor. Any combination of the letters *fatszcpmw* in any order. See *Contact Field Identifiers* on page 548 for meanings. Note that this parameter cannot be used in the URL, it must be in the parameter file. Note that, unlike other omitfield parameters, this parameter is not over-ridden by g2omitfields.
vpmustfields	ev	A list of contact-detail fields that *must* to be supplied by the user as well as Email and Last Name. Any combination of the letters *fatszcpmw* in any order. See *Contact Field Identifiers* on page 548 for meanings. Note that this parameter cannot be used in the URL, it must be in the parameter file. Note that, unlike other mustfield parameters, this parameter is not over-ridden by g2mustfields.

Parameters for Multi-Function Web Pages

Old versions of the Address Update, Donation, Membership Renewal, and Ticketing online modules are available in separate packages independent of one another.

The new direction for online integration with Sumac is to include all these functions together in one online environment with shared log-on. This enables a single website log-in to provide access to several features.

Course Registration support is only available in this multi-function configuration.

Keyword	*Default Value*	*Description*
catalogurl R		Sumac's course registration package can provide a course catalog on your website. If, however, you choose to use a different course catalog for choosing courses but still want to use Sumac for doing the actual registrations, this parameter contains a URL to be used when a website user clicks the Catalog link to view the course catalog. See *Using Your Own Course Catalog* on page 584.
dateformat1 R	same as *dateformat*	format for displaying dates in the course catalog
dateformat2 R	same as *dateformat*	format for displaying dates in the personal history lists
dateformat R	yyyy-mm-dd	Format for displaying dates: a pattern containing combinations of: yyyy 2012 yyy 2012 (or nothing in 2012) yy 12 mmmm December mmm Dec mm 12 (*1* shows as *01*) m 12 (*1* shows as *1*) dd 31 (*1* shows as *01*) d 31 (*1* shows as *1*) ww Monday w Mon Other characters appear unchanged.
deffeename R	Course fee	name for the session fee cost element (labelled *Total Fee* in the definition of a session)
nocatalog ADMT	f	*t* – course registration is *not* in use, so optimize data flow between the website and Sumac to omit ticketing information *f* – course registration *is* in use
nocoursenow R	At present, there are no courses for which you can register.	This message is displayed when a user attempts to display the course catalog and there are no courses.
noeventsnow T	At present, there are no events for which you can order tickets.	This message is displayed when a user attempts to order tickets and there are no ticketable events.
notheatre ADMR	f	t – ticketing is *not* in use, so optimize data flow between the website and Sumac to omit ticketing information f – ticketing *is* in use

Keyword	*Default Value*	*Description*
payaccount R	Enter payment information then click PAY to authorize the payment. We will email a confirmation message. If you do not receive the email, or seem to have been disconnected, please call us.	This message provides instructions above the payment panel for course payments other than registration. Only the Courses package uses this parameter; the *payment* use used for other packages.
precursym R		the symbol to be prefixed to numbers that represent currency amounts (any string of one or more characters such as $ or £ or USD)
selectevent T	select an event	This is the text that displays in a dropdown menu of event choices for a particular production event group.
sortcolumn R	0	the column on which the course catalog should be sorted when it is initially presented to a user 1 Course 2 Begins 3 Lasts
sortdir R	a	the direction in which the course catalog should be sorted when it is initially presented to a user a ascending d descending
Titles		The following parameters are comparable to the title parameter for the single-function web pages. The single-function title parameter, if supplied, is used for any single package.
dptitle D	Donation	Title for donations.
cutitle A	Updating your contact details	Title for contact updates.
mrtitle M	Membership Renewal	Title for membership renewal.
totitle T	Ticketing	Title for ticket ordering.
crtitle	Course Catalog	Title for course registration.
Payment Instructions		The single-package payment parameter, if supplied, is used for any single package.
topayment T	Enter payment information then click PAY to authorize the payment. We will email a confirmation message. If you do not receive the email, or seem to have been disconnected, please call us.	Instructions for payment for ticket orders.

Keyword	*Default Value*	*Description*
mrpayment M	Enter payment information then click PAY to authorize the payment. We will email a confirmation message. If you do not receive the email, or seem to have been disconnected, please call us.	Instructions for payment for membership renewal with no choice of plans.
dppayment D	Enter payment information then click %0 to authorize the payment. We will email a confirmation message. If you do not receive the email, or seem to have been disconnected, please call us.	Instructions for payment for donations and pledges.
payaccount R	Enter payment information then click PAY to authorize the payment. We will email a confirmation message. If you do not receive the email, or seem to have been disconnected, please call us.	Instructions for paying on account for a course registration.
paycourse R	Enter payment information then click either PAY FULL AMOUNT or PAY MINIMUM AMOUNT to authorize the payment. We will email a confirmation message. If you do not receive the email, or seem to have been disconnected, please call us.	Text to act as instructions above the payment panel on the final page for course registration. Any text (you can use in the text to force the start of a new line).
Instructions For Logging In		Instructions for logging in.
dpaddcontact D	If you are not in our database, please enter your information. Then click Submit.	Instructions for adding a user for donations. Uses the old *addcontact* parameter if supplied.
dpaddorlogin D	If you have already provided us with your contact information, just enter your email address and click Login. Otherwise please fill in the whole form including your email address and click Submit.	Instructions for adding a passwordless user for donationss, or logging one in. Uses the old *addorlogin* parameter, if supplied.
toaddcontact T	If this is the first time you have purchased tickets from us online, please enter your information. Then click Submit.	Instructions for adding a user for ticket ordering. Uses the old *addcontact* parameter if supplied.
toaddorlogin T	If this is not the first time you have purchased tickets from us online, just enter your email address and click Login. Otherwise please fill in the whole form including your email address and click Submit.	Instructions for adding a passwordless user for ticket ordering, or logging one in. Uses the old *addorlogin* parameter, if supplied.

Keyword	*Default Value*	*Description*
craddcontact R	If this is the first time you are registering for one of our courses, please enter your information. Then click Submit.	Instructions for adding a user for course registration. Uses the old *addcontact* parameter if supplied.
craddorlogin R	If this is not the first time you have registered for one of our courses, just enter your email address and click Login. Otherwise please fill in the whole form including your email address and click Submit.	Instructions for adding a passwordless user for course registration, or logging one in. Uses the old *addorlogin* parameter, if supplied.
mrloginwopw M	If you are already a member, just enter your email address and click Login. Otherwise please fill in the whole form including your email address and click Submit.	Instructions for logging in a passwordless user for membership renewal. Uses the old *loginwopw* parameter, if supplied.
culogin A	Enter your email address (the old one if it has changed) and your password. Then click Login.|	Instructions for logging in a user with password for contact update.
culoginwopw A	Enter your email address (the old one if it has changed). Then click Login.	Instructions for logging in a passwordless user for contact update. Uses the old *loginwopw* parameter, if supplied.
loginwopw M	Enter your email address. Then click Login.	Instructions for logging in a passwordless user for contact update.
loginwopw A	Enter your email address (the old one if it has changed). Then click Login.	Instructions for logging in a passwordless user for contact update.
login DFMRT	Enter your email address (the old one if it has changed) and your password. Then click Login.|	Instructions for logging in a user with password for contact update.

Parameters for Overall Style File

If you want to add your own styling to the body of the pages generated on your website, you can create a file named *over_sumac.css* and put it in the folder named *user*, where your page header and footer information resides. This file will be included in every HTML page that is generated by the Sumac website php code.

This overall style feature is available to Sumac Ticketing (online version 3.1.3 or later) and also to the Multi-Function Web Pages.

To help in debugging, a new parameter has been added:

Keyword	*Default Value*	*Description*
nooversumac ADMRT	f	f – use the *over_sumac.css* file (if there is one) t – ignore the *over_sumac.css* file

DIV Elements and Overall Style

The main HTML content of each Sumac-PHP-generated page is in two DIV elements. The outer DIV element has the same id in every Sumac page: *sumac_content*. The inner DIV element has a unique id in each Sumac page. Here are the DIV elements used in address update (*contact*), course registration (*courses*), donations (*donation*), membership renewal (*renewal*) and the online box office (*ticketing*):

sumac_contact_failed_content
sumac_contact_login_content
sumac_contact_thankyou_content
sumac_contact_update_content
sumac_courses_failed_content
sumac_courses_login_content
sumac_courses_payment_content
sumac_courses_personal_content
sumac_courses_register_content
sumac_courses_selectcourse_content
sumac_courses_thankyou_content
sumac_donation_failed_content
sumac_donation_login_content
sumac_donation_payment_content
sumac_donation_thankyou_content
sumac_renewal_failed_content
sumac_renewal_login_content
sumac_renewal_payment_content
sumac_renewal_thankyou_content
sumac_ticketing_failed_content
sumac_ticketing_login_content
sumac_ticketing_payment_content
sumac_ticketing_pickticket_content
sumac_ticketing_selectevent_content
sumac_ticketing_thankyou_content

By assigning styling to the common DIV, you can have the same appearance on all the Sumac pages. If you want one of the pages to be a bit different, assign different styling to the specific inner DIV.

So for example the "over_sumac.css" file might contain the following statements:

```
#sumac_content { max-width:500px; background:blue; }
#sumac_ticketing_selectevent_content { background:red; }
```

Then all content (except the user header and footer) would have a maximum width of 500 pixels. The *selectevent* page's content would have a red background and all the other pages would have a blue background.

The userdata Parameter

This parameter is a value that is passed from the website to Sumac with every HTTP request. It always starts with the name of the website that is sending the request, and then may have other components, separated from each other by semi-colons. Here is what can be in the userdata parameter:

userdata Value 1 – Website

The name of the website that is sending the request.

userdata Value 2 – Online Ticketing Event Group

The *userdata* parameter may have a second value – the ID of an Event Group from which the user is allowed to choose tickets. This value is separated from the first by a semi-colon. So this example would show only events that are in the group with event group ID 1033.

```
myCharity.com;1033
```

userdata Value 3 – Online Ticketing Discounts

You can limit which discounts are available to a person using your website if the website has some advance knowledge (e.g. a log-in procedure) of who the user is. This is done with a third value in the userdata parameter. Here is what the third value can contain one of these three things:

- a. A single character zero (e.g. *0*). This indicates that no discounts are to be presented to the website user for the events.
  ```
  myCharity.com;1033;0
  myCharity.com;;0
  ```
- b. A comma-separated list of contact type IDs (e.g. 80,73,92). This indicates that only discounts that are available to these contact types should be presented to the website user.
  ```
  myCharity.com;123;80,73,92
  myCharity.com;;17
  ```
- c. Nothing. This means that all discounts available for the event should be presented to the website user. Note that in this situation the delimiting semi-colon is optional.
  ```
  myCharity.com;123
  myCharity.com
  ```

Note that in the above examples the second parameter is optional. If it is omitted, then Sumac presents all available ticketed events to the website user, instead of limiting the list to a particular event group.

userdata Value 4 – New Contacts Segment

The fourth value in the userdata parameter is the ID of a contact segment. It is used to tell Sumac which segment a newly created contact should be put into. This enables you to have people clicking your website(s) be added to different segments depending, perhaps, on the type of person or their location.

userdata Value 5 – Team Fundraising Fund

The fifth value in the userdata parameter is a comma-separated list of contact type IDs. Any contacts with one of these contact types get added to the Fund drop-down menu in a donation page. See *Team Fundraising* on page 554.

userdata Value 6 – Campaign ID

This campaign is entered into donations received through Course Registration, Ticketing, and Membership.

userdata Value 7 – Donation Type ID

This donation type is entered into donations received through Course Registration, Ticketing, and Membership.

userdata Value 8 – Event ID

This event is entered into donations received through Course Registration, Ticketing, and Membership.

Appearance

Style Parameters

These parameters affect the appearance of the web pages:
titlecolour
fontsize
fonttype
textcolour
bodycolour

over_sumac.css

You can change the styling by providing your own styles in the user file over_sumac.css.

Package-specific Styling

Starting with the new-style Donation2 package, you can supply styles for each new package separately by putting your styles in the user files named for the individual packages,. For example *over_sumac_donation2.css* for the Donation2 package. The styles in *over_sumac.css* are still applied too but package-specific Styling overrides them.

Validating Human Beings (reCaptcha)

Sometimes robots attempt to test stolen credit cards by making small donations to charities. You can prevent this type of payment by requiring users to do something that confirms they are human beings instead of computers.

Sumac's website integration implements Google reCaptcha for this purpose. This feature can require a website user to enter reCaptcha information to confirm payment operations.

1. Get Keys

Before enabling reCaptcha you must obtain the Google API keys (a key and a secret). Then you must add them in you parameter file using the captchakey and captchasecret parameters, e.g.

```
captchakey|6LeIxAcTAAAAAJcZVRqyHh71UMIEGNQ_MXjiZKhI|
captchasecret|6LeIxAcTAAAAAGG-vFI1TnRWxMZNFuojJ4WifJWe|
```

2. Tell Sumac To Require reCaptcha

To enable reCaptcha for *all* payments, add to your parameter file:

```
g2recaptcha|t|
```

To enable reCaptcha for individual packages, add as many of these to your parameter file as you need:

`c2recaptcha|t|` Course Registration
`d2recaptcha|t|` Donations
`m2recaptcha|t|` Membership
`t2recaptcha|t|` Ticketing

3. Adjust Messagess

You may want to adjust some of the messages that tell a user that the feature cannot be bypassed (x can be c,d,m,t, or g):

```
x2PE3|PleaseConfirmThatYouAre|Please confirm that you are not a robot and submit the payment again|

x2PE4|AreYouQuiteSureYou|Are you quite sure you are not a robot? Please try again|
```

Log-in Panels

Sometimes a user must identify himself in to accomplish something: e.g. register for a course, add himself to your mailing list, buy some tickets. A website user identifies himself with his email address and a password, entered in a log-in panel. The log-in panel on the website can take two basic orms that can be combined in various ways:

- *Create Account*: This is for a user who is not in your database. It requires the user to enter his contact details: name, phone, address, email, etc.
- *Log-in*: The other lets a user enter his email address and password only, then click to log in. If he does not know his password, there is a button for password recovery. If he does not think he is in your database, he can click to get Create Account form and add himself to your database.

Depending on the context, you may want to present one or both of these forms. There are *loginpanel* parameters that let you do this:

Keyword	*Package*
c2loginpanel	Course Registration 2
d2loginpanel	Donations 2
e2loginpanel	Directories 2
f2loginpanel	Single Form
m2loginpanel	Membership 2
t2loginpanel	Ticketing 2
r2gloginpanel	Review Grant (grantee)
v2wloginpanel	Volunteer Management (worker)

The *loginpanel* parameters can have the following values:

Value	*Meaning*
C	show the *Create Account* variant
L	show the *Log-in* variant
CL	show the *Create Account* variant on the left and the *Log-in* variant on the right
LC	show the *Log-in* variant on the left and the *Create Account* variant on the right
CorL	show the *Create Account* variant with the *Log-in* variant hidden and links to switch between them
LorC	show the *Log-in* variant with the *Create Account* variant hidden and links to switch between them
CandL	show the *Create Account* variant with the *Log-in* variant below it
LandC	show the *Log-in* variant with the *Create Account* variant below it

What Gets Displayed

Links

At the top of a web page, there is a button bar of links to other web pages. Use these parameters to indicate which links should be present.

Keyword	*Default Value*	*Description*
contactlnk A	f	Address Update: *t* – include link to this module *f* – do not include link to this module
courseslnk R	f	Course Registration: *t* – include link to this module *f* – do not include link to this module
directlnk O	f	Online Directory: *t* – include link to this module *f* – do not include link to this module
donationlnk D	f	Donations: *t* – include link to this module *f* – do not include link to this module
leavelnk ADMRT	f	*t* – include link to log off and exit the Sumac web components *f* – do not include link to log off and exit the Sumac web components
renewallnk M	f	Membership Renewal: *t* – include link to this module *f* – do not include link to this module
ticketlnk T	f	Ticketing: *t* – include link to this module *f* – do not include link to this module

Starting Point

When you launch the Sumac web pages, you can tell them where to start: which pages to show first. These parameters apply when you launch the Sumac components using *sumac_start.php* or *sumac_start_new_session.php*. The old start files, *raods_start.php*, *raots_start.php*, etc. do not need or use these parameters.

These parameters can *only* be entered in the href URL, they cannot be used in the parameter file.

Keyword	*Default Value*	*Description*
package	[there is no default value; you must specify something for this parameter]	the Sumac component to be executed: one of these packages *donation*: donations *donation2*: new-style donations *singleform2*: enter a single form *signup2*: a form for signing up (adding a contact to the database) *ticketing*: box office *courses*: course registration (see notes) *membership*: member sign-up, renew *membership2*: member sign-up, renew (with a new and improved appearance on websites) *contact*: address update *directories*: an online directory *grantreview2g* online grant applications for grantees *grantreview2r*: online grant applications for reviewers *volprofile*: let a user sign up to be a volunteer
entry		if this parameter is set to *login*, then when the Sumac components start, the first thing that appears is the log-on screen (note that this affects only the course registration and box office components since the others necessarily start with logging on)

Course Registration Starting Point

If you set package=courses, then the entry parameter can have these values:

URL Parameter	*Starting Point*
&package=courses	Start with course catalog.
&package=courses&entry=formslist	Start with forms entry.
&package=courses&entry=paycourse	Start with course payment.
&package=courses&entry=finhistory	Start with a financial summary.
&package=courses&entry=eduhistory	Start with a summary of courses taken.
&package=courses&entry=login	Start by logging in to the website.
&package=courses&entry=register&course-name=AAA&coursedate=BBB	Start by registering for the session whose course name is AAA and whose starting date is BBB

Volunteer Sign-up Starting Point

There are two ways of running this package:

URL Parameter	*Starting Point*
&package= *volprofile*	Start with the page for adding a new account and profile.
&package=volprofile&entry=login	Start with the page for updating an existing account and profile.

Ending Point

When a web user wants to leave the Sumac packages and return to your website, Sumac uses information from the user's browser to determine where to go. However, some browsers do not reliably provide this information.

The following parameters let you specify where in your website a user should go when he clicks an exit link or button.

Keyword	*Default Value*	*Description*
exiturl		The URL for the code to go to when the user clicks one of the exit links or buttons. This URL can be overridden for each individual package by one of the following parameters. If no exiturl parameter is supplied, the code uses information from the browser, which is not always reliable, to determine the page from which Sumac code was started.
donexiturl		The web address for the code to go to when the user clicks one of the exit links or buttons in the Donations package.
d2exiturl		The web address for the code to go to when the user clicks one of the exit links or buttons in the Donations2 package.
tktexiturl		The web address for the code to go to when the user clicks one of the exit links or buttons in the Ticketing package.
crsexiturl		The web address for the code to go to when the user clicks one of the exit links or buttons in the Course Registration package.
direxiturl		The web address for the code to go to when the user clicks one of the exit links or buttons in the Directories package.
memexiturl		The web address for the code to go to when the user clicks one of the exit links or buttons in the Membership package.
conexiturl		The web address for the code to go to when the user clicks one of the exit links or buttons in the Address Update package.
f2exiturl		The web address for the code to go to when the user clicks one of the exit links or buttons in the Sign Up package.
s2exiturl		The web address for the code to go to when the user clicks one of the exit links or buttons in the Single Form package.

Course Registration Buttons

The Course Registration module has its own navigational bar. You can specify that some of the links in that bar should be omitted:

Keyword	*Default Value*	*Description*
omiteduhist R	f	omit the education section of the Personal History page of the course registration package *t* – omit the section f – include the section

Keyword	Default Value	Description
omitfinhist R	f	omit the financial section of the Personal History page of the course registration package: *t* – omit the section *f* – include the section
omitformsum R	f	omit the forms summary section of the Personal History page of the course registration package *t* – omit the section *f* – include the section
omitcnavbar R	f	omit the whole course registration navigation bar *t* – omit it *f* – include it

Changing The Text

From release 4.4.0 of the online transaction package, you have the ability to change all the text in all the pages. Among other things, this provides support for translating the pages to a completely different language.

You do this by editing a file named *sumac_strings.settings* which is in the *user* folder. It contains lines that look like this:

`AL2|ButtonRetrievePassword|Email Password|`

Each line has three components, each terminated by a vertical line |.

◆ an identifier used by the software	`AL2`
◆ a descriptive name for the string	`ButtonRetrievePass-word`
◆ the actual text	`Email Password`

You must never change the first two things. You may edit the third component to change the text in the user interface of the website pages.

Variables In Text

Some text strings can have variable components. Unless the description of a specific string says otherwise, the variable components are as follows:

%0 = the Currency Symbol, from the parameter *precursym*
%1 = the organization name as defined in the Sumac database
%2 = [reserved for future use]
%3 = [reserved for future use]
%4 = [reserved for future use]
%5 = the Fixed Amount value, from the parameter *d2fixedamt*); this works for for the new-style Donation2 package only.

Accented Characters (Ampersand Codes) in Text

Most text in *sumac_strings.settings* is regular HTML text, so accented characters need to be escaped, using the standard &...; syntax. But this syntax does not apply to labels on buttons and other text which is used as an attribute to an HTML element instead of being used as HTML text.

Here is an example: You want to change a button labelled *Create*, so that it shows the French equivalent: *Créer*. If this was treated as standard text, then you would change it to *Créer*. But this text is used as an attribute of a button, and & codes are not processed in HTML attributes. In this particular case, you should just change the text to *Créer* and everything will work fine.

Here are the strings that are used as HTML attributes and therefore do not process & codes:

C2L30	E2NL10	M2NL2	T2NL2
C2L31	E2NL11	M2NL3	T2NL3
C2L32	E2NL2	M2NL7	T2NL7
C2L36	E2NL3	M2PL1	T2PL1
C2ML2	E2NL7	M2PL2	T2PL2
C2NL1	E2SL5	M2PL4	T2PL4
C2NL10	F2ML2	R2GML2	U2NL1
C2NL11	F2NL1	R2GNL1	U2NL2
C2NL2	F2NL10	R2GNL10	V2ML2
C2NL3	F2NL11	R2GNL11	V2OML2
C2NL7	F2NL2	R2GNL2	V2ONL1
C2PL2	F2NL3	R2GNL3	V2ONL10
C2PL4	F2NL7	R2GNL7	V2ONL11
D1NL1	G2ML2	R2RML2	V2ONL2
D1NL2	G2NL1	R2RNL1	V2ONL7
D1NL7	G2NL10	R2RNL2	V2SL5
D2NL1	G2NL11	S2L2	V2SL6
D2NL10	G2NL2	S2NL1	V2WML2
D2NL11	G2NL3	S2NL10	V2WNL1
D2NL2	G2NL7	S2NL11	V2WNL10
D2NL3	G2PL4	S2NL2	V2WNL11
D2NL7	G2SL5	S2NL3	V2WNL2
D2PL1	G2SL6	S2NL7	V2WNL3
D2PL2	M2NL1	T2NL1	V2WNL7
E2ML2	M2NL10	T2NL10	V2WSL5
E2NL1	M2NL11	T2NL11	V2WSL6

Response Messages

Sometimes Sumac sends messages to your website. These may report successful outcomes (thanks for your donations), or problems (the seats you have requested are already sold to another patron).

Since release 5.6.3 of the web components, you can override some of these messages. You override them by defining the message in the file sumac_strings.settings in the user folder of the web components. If the message has a code *SMDonationOK*, and you want to override the standard text for the message that Sumac produces, add a line like this to sumac_strings.settings:

```
SMDonationOK|comment|Thanks for %0. We sent you an email.|
```

The line above contains three things, each one terminated by a vertical bar:

- the code, which is pre-defined by Sumac
- an optional comment; even if you do not put a comment in the line, make sure you include its vertical bar.
- the new text for the message.

Insertion Codes

Some messages allow insertion codes: places where optional text can be inserted. For example, SMThanksForDonation could be defined to hold the amount of the donation, so the text might read "Thanks for your donation of $50.00". Since the amount cannot be known in advance, you need to indicate where the amount should be put.

This is done with an insertion code: a percent sign followed by a digit (starting at 0). If Sumac provides for inserting the amount into the SMThanksForDonation message, then it could read "Thanks for your donation of $%0". Before presenting the message to the website user, %0 would be replaced by the amount of the donation.

Codes and Messages

Here are the response messages that can be overridden (do not put hyphens in Message Codes):

Message Code	*Default Text*	*Notes, Insertion Codes*
SMDonationOKE-mailNot	Your donation has been confirmed and your payment of %0 has been processed. However, we encountered problems when trying to send you a confirming email.	Donations %0=amount of donation
SMNoPassword	The email address and password are not registered	
SMDonationOK	Thank you for your donation. Your credit card has been charged %0. We have sent a confirmation email.	Donations %0=amount of donation
SMPwdSent	An email containing your password has been sent to %0	Password Recovery %0=email address
SMOrderOK	Thank you for your order. Your order confirmation number is %0. Your credit card has been charged %1. We have sent a confirmation email.	Course Registration %0=order number %1=amount charged
SMWaitOK	Thank you for your order. You are in the wait list of %0. We have sent a confirmation email.	Course Registration %0=session description
SMRegWaitOK	Thank you for your order. Your order confirmation number is %0. Your credit card has been charged %1. You are in the wait list of %2. We have sent a confirmation email.	Course Registration %0=order number %1=amount charged %2=session description
SMMemRenewOK	Thank you for renewing your membership. Your credit card has been charged %0. We have sent a confirmation email.	Membership %0=amount charged
SMAddChildOK	%0 %1 added to the people you can register for courses	Membership %0=attendee first name %1=attendee last name
SMAddChildFailed	%0 %1 not added to your list	Membership %0=attendee first name %1=attendee last name
SMMemRewewOK	Thank you for renewing your membership. Your credit card has been charged %0. We have sent a confirmation email.	Membership %0=amount charged
SMFundOrNote	Please specify a fund or specify the purpose of the donation in a note	Donations
SMMemCheckFailed		Membership
SMVMProfileApproved	This profile has been approved so it cannot be changed	Volunteer Management

Message Code	*Default Text*	*Notes, Insertion Codes*
SMAddChildOK	%0 %1 added to the people you can register for courses	Course Registration %0=attendee first name; %1=attendee last name
SMFormOK-GAFailAdd	Your application form has been saved, but there was a database error when trying to add a new grant application has been added to our database. Please phone for help.	Awarding Grants
SMGAInternalError	Internal error in grant application module	Awarding Grants
SMFormOK-GAFailUpdate	Your application form has been saved, but an error occurred when trying to update your grant application. Please phone for help.	Awarding Grants
SMFormSaved	The \"%0\" form has been saved.	Awarding Grants %0=form definition name
SMFormUpdated	The \"%0\" form has been updated.	Awarding Grants %0=form definition name
SMFormOKGAUpdated	Your application has been updated.	Awarding Grants
SMFormOKGAUpdatedReview		Awarding Grants
SMFormOKGASubmitted	Thank you for submitting your application.	Awarding Grants
SMFormOKGASubmittedReview	Thank you for submitting your review.	Awarding Grants
SMFormOK-GAFailAdd	Your application form has been saved, but there was a database error when trying to add a new grant application has been added to our database. Please phone for help.	Awarding Grants
SMFormOK-GAFailUpdateReview	Your review form has been saved, but an error occurred when trying to update your grant application. Please phone for help.	Awarding Grants
SMGAInternalError	Internal error in grant application module	Awarding Grants

States and Provinces

There are several parameters that allow you to specify a drop-down menu for provinces and states. The names of these parameters contain *statesdd*. They can contain a value which specifies a file that holds the state names to use:

parameter value	*file*
can	sumac_can_province_dropdown.htm
canus	sumac_provinces_and_states_dropdown.htm
us	sumac_us_state_dropdown.htm
uscan	sumac_states_and_provinces_dropdown.htm

If there is no value for one of these parameters, the website user must type in a state or province.

You can change the contents of these files. For example, if you want to use Australian states, give the parameter a value of can, and change the file sumac_can_province_dropdown.htm to hold Australian state names instead of Canadian provinces.

Online Directory

Sumac can publish lists of Grow-Your-Own records to your website. Web users can specify search criteria and Sumac displays the matching records.

What Gets Published to Your Website

The Grow-Your-Own records in your database get published. If you want a particular type of Grow-Your-Own record to be published to your database, tell Sumac the name of the directory to be displayed on the web. You do this by clicking Utilities/Customize Database/Preferences/Grow-Your-Own in the Sumac console window, and entering the name of the list.

The data fields that are displayed for each record are the ones that are showing in the list window of the Sumac user who logs on to serve the website. The fields that a website user is allowed to search are the ones that are marked *Show in Search Panel* in their field definition.

> Hint: web directory searching is currently supported for these types of fields: lookup lists, contacts (searchable by last name), and text fields.

Parameters

Here are the parameters that are used for specifically setting up the presentation of Grow-Your-Own records on your website.

Keyword	*Default Value*	*Description*
directlnk O	false	Set this parameter to true if a link to the Directories package should be included in the Sumac navigation bar.
selectorht O	80px	This is the default height of a multiple-selection drop-down list in a directory selector. The value can be any valid HTML measurement, e.g. *100px*, *3cm*.
selectorbg O	cornsilk	This specifies the background colour for the directory selector panels. It can be any valid HTML colour (e.g. *Cornsilk* or *Burlywood* or a hex-coded RGB value (e.g. *#666666)*.
selectedbg O	aqua	This specifies background colour for a selected choice in a multiple-selection drop-down list in a directory selector. It can be any valid HTML colour (e.g. *Cornsilk* or *Burlywood* or a hex-coded RGB value (e.g. *#666666)*.
resultsshow O	1	Specify default behaviour for showing the results of a directory search: *1* – show results in a new tab or window *2* – show results in the current tab or window

Keyword	*Default Value*	*Description*
resultsformat O	1	Indicate how the results of a directory search should be displayed: *1* – format entries as a list of records (fields above each other) *2* – format entries as a table (like a spreadsheet with rows and columns)
eitherformat O	false	Give the website user the option of choosing between the two formats described in the *resultsformat* parameter. *true* – let the user choose *false* – do not let the user choose

Style Sheet

The appearance of the searching and results lists are controlled by a style sheet.

The Directories package displays selected entries either in a list (records one above the other listing fields vertically) or as a table (spreadsheet style, one record per row, fields in columns).

The styling of the list should be nested under

#sumac_entries_as_list.

The styling of the table should be nested under

#sumac_entries_as_table.

List Formatting

The entries in the list, consisting of rows each with label and data, are styled by these classes:

tbody.sumac_entry for every entire entry
tbody.sumac_entry_odd for each entire alternate entry, starting with the first
tbody.sumac_entry_even for every other entire entry
tr.sumac_row for every row
tr.sumac_row_1 for the row containing the first field in each entry
tr.sumac_row_2 for the row containing the second field in each entry
etc.
td.sumac_label for the label of any field of every entry
td.sumac_label_1 for the label of the first field of each entry
td.sumac_label_2 for the label of the second field of each entry
etc.
td.sumac_data for the data of any field of every entry
td.sumac_data_1 for the data of the first field of each entry
td.sumac_data_2 for the data of the second field of each entry
etc.

Table Formatting

The entries in the table, each row being one entry, are styled by these classes:

tr.sumac_entry for every entire entry
tr.sumac_entry_odd for each entire alternate entry, starting with the first
tr.sumac_entry_even for every other entire entry
tr.sumac_row_head for the entire row of column labels
td.sumac_label for the label of the column of any field
td.sumac_label_1 for the label of the column containing the first field
td.sumac_label_2 for the label of the column containig the second field
etc
td.sumac_data for the data of any field of every entry
td.sumac_data_1 for the data of the first field of each entry
td.sumac_data_2 for the data of the second field of each entry

etc.

(Note that the classes for the entries in the table are prefixed 'tr.', and in the list 'tbody.')

Style Sheet Examples

To colour the background of alternate rows of a table:
#sumac_entries_as_table tr.sumac_entry_even {background-color:lightblue;}
To ensure that the fourth column of a table with five fields has about one-third of the width:
#sumac_entries_as_table td.sumac_label_1 {width:16%;}
#sumac_entries_as_table td.sumac_label_2 {width:17%;}
#sumac_entries_as_table td.sumac_label_3 {width:16%;}
#sumac_entries_as_table td.sumac_label_4 {width:34%;}
#sumac_entries_as_table td.sumac_label_5 {width:17%;}
To ensure that the data in the first column of a table doesn't get forced onto more than one line:
#sumac_entries_as_table td.sumac_data_1 {white-space:nowrap;}
To make all the labels in a list with any number of fields italic:
#sumac_entries_as_list td.sumac_label {font-style:italic;}
To alternate the text colouring of the entries:
#sumac_entries_as_list tbody.sumac_entry_odd {color:green;}
#sumac_entries_as_list tbody.sumac_entry_even {color:greenyellow;}

Email Click Tracking

If you are using Sumac's website integration, then you can track clicks on links in your website or in bulk emails that you send. This is done by changing the links so that they reference the online integration package. The online integration package records the click in your Sumac database.

Change the Link

Here is a sample link:
`http://myCharity.com/sumac/newsletter.php/?L=PICTURE&U=123`
where:

`http://myCharity.com/sumac/`	Directs the link to your website (`myCharity.com`) and to the folder (`/sumac`) where you have put the online transaction package.
`newsletter.php`	This must appear just as it is. `newsletter.php` is the module of the online integration package that tracks clicks.
`L=PICTURE`	L= introduces the link. In this case the link is PICTURE, which won't work but demonstrates the syntax.
`U=123`	U= identifies the ID of the contact who is clicking the link. This parameter is optional. It would usually be formed by a mail merge which would insert the ID of the recipient of the bulk email.

Here is an example:

```
http://myCharity.com/sumac/newsletter.php/?L=http
%3A%2F%2Fweather.gc.ca%2Fcity%2Fpages%2Fon-
128_metric_e.html&U=123
```

which links to a weather page, and the user ID is 123. Notice that special characters in the link (after L=) must be encoded. Here are some common characters that often occur in links and which must be encoded:

`;`	semi-colon: %3A
`/`	forward slash: %2F
`[space]`	space: +

Here is a link to a convenient tool for encoding your links:

```
http://www.freeformatter.com/url-encoder.html
```

In practice, the user ID would probably be inserted by Sumac during a mail merge, so it the example would look more like this:

```
http://myCharity.com/sumac/newsletter.php/?L=http
%3A%2F%2Fweather.gc.ca%2Fcity%2Fpages%2Fon-
128_metric_e.html&U=<<c_id>>
```

Report on Clicks

When a user clicks a link, the click is recorded in your Sumac database. You can get a report about this information by clicking the *Click-through Statistics* report under Email in the contacts list window.

File Transfers

Browser to Sumac

Some Sumac modules allow a website user to transfer files from his computer to the Sumac database. Some special considerations apply:

- The maximum file size is 5 MB. Uploads will fail if the file is larger than this.
- PHP has the following configuration settings:
  memory_limit which must be greater than
  post_max_size which must be greater than
  upload_max_filesize.
- Uploads fail if the file is larger than upload_max_filesize.

Sumac to Browser

These transfers enable a website user to review a file that was previously uploaded to the Sumac database. The website PHP code receives the file, one block at a time. The blocksize being set by the *attmtblock* user parameter which takes a value between 1 and 86016. Available memory in the browser or the user's computer may also limit this size.

Course Registration

Using Your Own Course Catalog

Sumac's course registration package can provide a course catalog on your website. If, however, you choose to use a custom course catalog for choosing courses but still want to use Sumac for doing the actual registrations, this section explains what to do.

✔ In the parameter file, set the catalogurl parameter to the URL of your custom course catalog. When a website user clicks the Catalog link to view the course catalog, the URL in the catalogurl parameter is used.

- ✔ When your custom course catalog wants to tell Sumac to register a student for a course, the catalog must go to this
```
SUMACFOLDER/sumac_start_new_session.php?
source=III&port=PPP&package=courses&coursename=CCC
&coursedate=DDD&entry=register
```
where:

`SUMACFOLDER`	full folder name for the Sumac online code
`III`	IP address of the computer running Sumac
`PPP`	port to communicate with the computer running Sumac
`CCC`	name of the selected course (URL encoded)
`DDD`	date of the selected session (any Sumac-recognized format)

Here is a sample URL for a course named "ABC Course" starting on December 18, 2013:
```
https://myCharity.org/multiFunction/
sumac_start_new_session.php?
source=12.34.56.78&port=80&package=courses&course-
name=ABC+Course&coursedate=2013-12-18&entry=register
```

Testing Support

Test Your Sumac Database

You may find it convenient to test the components in your office (Sumac database, computer running Sumac acting as a server, router) before you have created a website. We have placed the most recent version of the multi-function web components on sumac.com, and you can use them anytime.

Here is a sample link (type it all on one line):
```
http://sumac.com/multiFunction/
sumac_start_new_session.php?
source=11.22.33.44&port=80&allowhttp=t
```
The above link would have to be changed: replace *11.22.33.44* with the IP address for your computer (see *Step 6: Static External IP Address* on page 537) and the *80* should be the port you have decided to use (see *Step 7: Configure Router* on page 538).

The pages on sumac.com are not encrypted (see *Step 9: Make Web Pages Secure* on page 540), so you always need to add *&allowhttp=t*.

Add to the above link as required. For example, if you want the pages to start showing a course registration catalog, add &package=courses to get
```
http://sumac.com/multiFunction/
sumac_start_new_session.php?
source=11.22.33.44&port=80&allowhttp=t&package=cou
rses
```

Verify The Website Installation

Once you have installed the webs integration components on your website, you can test that all the files are in the right place.

Do this by running sumac_installation_verify.php which is in the main directory you installed. It checks that all the necessary files are correct and have the correct version number. If something is incorrect, then the errors are reported. It also reports any additional unexpected files that it finds in the installation folder, and any discrepancies between what is expected in the *certs* and *user* folders and what is present on the your website. This verification program also checks to ensure that two required PHP extensions are present: *curl* and *openssl*.

Hint: The sumac_installation_verify.php program has an optional parameter: *userhtml*. If included (e.g. sumac_installation_verify.php? userhtml), the program displays the headers and footers defined for your website pages – an additional level of verification.

Trouble-Shooting

In this section, the computer that runs Sumac and responds to transactions from a website, is called the *transaction server*.

Web Page Caching

Sumac PHP Code

There are two starting points for the Sumac website components. The key difference between them is that one remembers users who have logged in already, while the other does not.

Hint: If a session has been inactive for 30 minutes, then the session is terminated.

Starting Point	*Description*
sumac_start.php	If a user logged in within the last 30 minutes, then continue that session. Otherwise start a new session.
sumac_start_new_session.php	Forget anyone whose has logged in and start a fresh session. This starting point is the one usually used when developing and debugging your website, because caching of logged-in users can significantly confuse your testing results. This starting point is also the one most often used in production for websites where users typically just perform single transactions, e.g. a course registration, a ticket purchase, a donation.

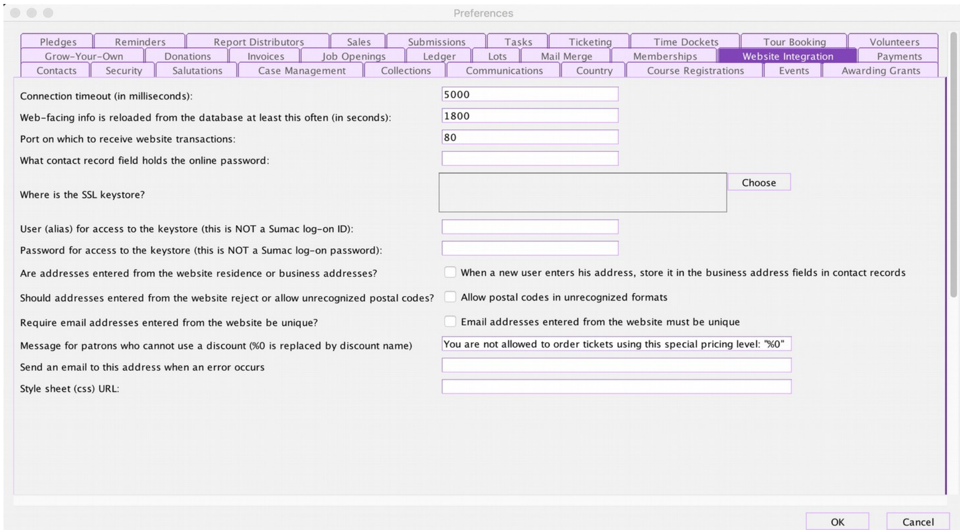
Web Server Caching

Some web servers cache pages very aggressively. In production usage, this can make the web server much faster. However, while testing, this may cause problems because even a URL that invokes sumac_start_new_session.php may not cause any PHP code to execute at all: the page it generated previously will be retrieved from a cache and displayed again.

In this situation, it is often convenient to change a single character when testing. One simple technique takes advantage of the fact that when the PHP code looks at the values of some parameters, it looks at only the first character. So if your testing URL contains *allowhttp=t*, you can change it to *allowhttp=tr*, *allowhttp=tru*, or even *allowhttp=t1* and *allowhttp=t2*. This single character change, which is ignored by Sumac, will defeat the server's caching and force the page to be reloaded each time.

Sumac Tells You About Problems

Click Utilities/Customize Database/Preferences/Website Integration to get this dialog:



Notice the field that is labelled *Send an email to this address when an error occurs*. When Sumac identifies one of the following errors, it sends an email to this email address, telling the recipient to fix the problem.

- The structure of the database has been updated (because of a new release of Sumac) but the copy of Sumac serving the website is old and needs to be updated to work with the new database structure.
- Keys are being used to encrypt and decrypt payments, but the online transaction server does not have a password for a key that will enable it to save payment information.

General, Communications

Problem	*Trouble-Shooting*
Web page reports that the data coming back from Sumac is in error or is formatted incorrectly.	Check the error: You can get more details about the error by putting *debug=displayerrors,rawxml* (preceded by *?* if it is the first parameter, by *&* if it is not). *displayerrors* causes error messages to appear in the html page. *rawxml* causes the xml sent from Sumac to the website to be included in the web page source. If the error messages in the html page do not tell you what you need to know, try looking at the XML in the page source. Version issues: If the newest Sumac is being used but an old version of the web components is being used, it is possible that the error message is because Sumac is sending new types of information that the web components cannot understand. One example of this is error messages about seat weights (you need the multi-function components version 4.3.2 or later to support this). Note that the Sumac pages display their version information just above the page footer on a website.

Problem	*Trouble-Shooting*
The website is displaying an error like this: *Notice: Undefined index: SUMAC_STR in ... on line 425*	Probably the file *sumac_strings.settings* has been deleted from the user folder on the website.
Sumac running on the transaction server cannot connect to the designated port.	If Sumac is unable to open a conversation on the port specified in the Preferences, then it tells you this when you choose the *Utilities/Website/Start Transaction Server* command. On Mac OS X, you usually cannot use port 80, but 8080 usually works fine. If you see someone trying to use 80 on a Macintosh, suggest a change.
Website pages time out waiting for Sumac to respond.	Is Sumac actually running on the transaction server? Has the website been told to send things to the right IP address and port number? On the transaction server, use a browser (go to whatismyip.org) to confirm its external address, which should be the address in the source parameter of the website. Has the Utilities/Website/Start Transaction Server been performed on that transaction server? Are any transaction counts being incremented in Sumac's transaction server window? If a click on the website causes a transaction count to increment, then most connectivity problems have been resolved. Is the router sending incoming transactions to the correct IP address within the office (i.e. the IP address of the computer running Sumac). Note that the title bar of Sumac's transaction window indicates the local IP address of the computer it is running on, and the router should be forwarding transactions to it.

Online pages appear strange or junky.	In a browser, check the source of the page: Does it have more than one <html> tag? A browser page should have only one <html> tag, so if there are two or more the page will display strangely.
	Probably this has happened because the user's headers and footers are complete html (which contain <html>...</html> tags) documents instead of just bits of things to be inserted in a page. Here is a sample header that works, has no <html> tags, and which is distributed with our online packages:
	`<table class="page_header">`
	`  <tbody>`
	`    <tr>`
	`      <td class="page_header">`
	`Non-Profit Organization's Page Header`
	`      </td>`
	`    </tr>`
	`  </tbody>`
	`</table>`

Problem	*Trouble-Shooting*
An error message says that something could not be encrypted. or Sumac's window on the transaction server indicates a lot of *Bad Messages* (i.e. not interpretable) messages.	Check public and private keys: The .pem file on the website is not matched to the .jks file on the transaction server.
Response is slow.	The amounts of data traveling back and forth are small, so this is rarely a problem. Check line speed. Check Bad Messages: In one situation Sumac on the transaction server was getting many Bad Messages per second (the counter was moving up fast). This turned out to be a server in the customer environment not working properly.

Email

Problem	*Trouble-Shooting*
Emails are not being sent to people who do transactions on our website.	Confirm that the emails are not being sent: Sometimes they are being sent correctly but the customer is testing with an unexpected email address, e.g. thinking that the test contact has an email address of jane@charity.org when, in fact, the test contact has an email address of john@charity.org. Make absolutely sure that a contact with the right email is being used in the testing. Confirm that Sumac is able to send bulk emails: On the transaction server, in Sumac, show the Contacts list, pick a contact with a known email address (your own if possible), use the Send Bulk Email command to send yourself an email using the default office record. Make sure that you do the Send Bulk Email command using the default office record and that there is only one default office record, since the transaction server uses the default office record. If you cannot do this, then fix the office records to make sure that you can.
Emails are being sent but the wrong template is being used.	No template being used: If Sumac cannot get a template when it needs to send an email response to someone on a website, it makes up a plain but functional response (e.g. thanks for your donation, thanks for buying tickets, etc.). Right template chosen: Check the Preferences to make sure that a template has been chosen. Template accessible: Check to make sure that the template file is accessible from the transaction server.

Ticketing

Often the best way to figure out why an event is not showing up on your website is to use the events list (click Events/Events in the Sumac console window), and display *Ticketable Status*. This column indicates whether the event is ticketable in your office (i.e. by using Sumac), or on your website. If tickets for the event cannot be ordered in one of those places, *Ticketable Status* tells you exactly why not.

The following tables provide additional details.

Problem	*Trouble-Shooting*
I cannot order tickets online.	Check that events are ticketable: Can you order tickets just using Sumac, i.e. not using a web browser at all? To test this, open the Ticket Orders list, click *New* to create a new order, click *Choose Event* to choose an event. Then click *Tickets can be ordered*. This causes Sumac to show only those events which are ticketable (see *When Are Events Ticketable?* on page 590). If none are showing, then fix this problem. Check that the events are ticketable on a website: See *When Are Events Ticketable On Website?* on page 591.
The page for choosing seats is formatted incorrectly.	See *Choosing Seats On Website for Ticketable Events* on page 591. Note that you may have a play that runs for 10 performances (i.e. 10 events in an event group), and some can use one approach to seating (general admission) while others use assigned seating.
I can pick an event, but there are no seats to be chosen.	Check the conditions in *When Are Events Ticketable On Website?* on page 591. Perhaps all seat blocks are marked *Do not display on web*. Perhaps there are some such seat blocks but seat selection is being done with *Assigned Seating – No Venue Picture* (see *Choosing Seats On Website for Ticketable Events* on page 591) and the seat blocks have not been positioned within the theatre.
I changed event information and it does not show up on the website.	Reload time: To save load on the database server, Sumac on the transaction server only reloads information from the database every once in awhile. The time for this is specified in the Preferences. Do not make this time too short (1800 seconds, half an hour, is a reasonable delay). Force reload: During testing and set-up, you may want to force a reload. Do this by quitting and restarting Sumac on the transaction server.

When Are Events Ticketable?

You can only order tickets for an event if:

- Your Sumac licence includes the ticketing module.
- The event has a date that indicates when sales start.
- The event has a price scheme.
- The event has a venue.
- The date of the event itself is not before today.

- The date when sales start is not after today.
- The date and time when sales end (if specified) is not before now.

When Are Events Ticketable On Website?

To be ticketed on a website, an event must be ticketable (see *When Are Events Ticketable?* on page 590). It must also satisfy these criteria:

- The event is not marked *Do not display on web*.
- The event is in an event group which is marked *Show this group on website*, and the event group is in a web grouping.
- The event has some seat blocks that are not marked *Do not display on web*.

Choosing Seats On Website for Ticketable Events

Sumac has three different ways that it can facilitate users picking seats on a website:

a. No Assigned Seating

Sometimes called General Admission or Open Seating, in this option there are *n* seats available and they are all the same, i.e. all seats are priced the same.

To use this seating approach, the event must have exactly one seat block that has the desired number of seats in it.

b. Assigned Seating – No Venue Picture

In this situation, Sumac automatically generates a picture of the venue and lets buyers click individual seats and add them to their orders. This requires that each seat block has been positioned within the theatre: you position seat blocks by clicking to select one or more contiguous blocks in the theatre layout picture of the seat block editing window.

c. Assigned Seating – Venue Picture

This approach requires that the definition of the venue must have a valid *URL of Seating Plan*. Make sure it is valid by just pasting it into a browser and viewing it. A valid URL is: http://sumac.com/assets/css/images/logo.gif (but this URL is just a logo, not a picture of a theatre).

When there is a URL for a venue picture, the buyer chooses seats using drop-down menus. The seat blocks should use naming (first prefix, second prefix) that relate to the picture, so that a buyer can relate what is in the drop-down menus to what is in the picture.

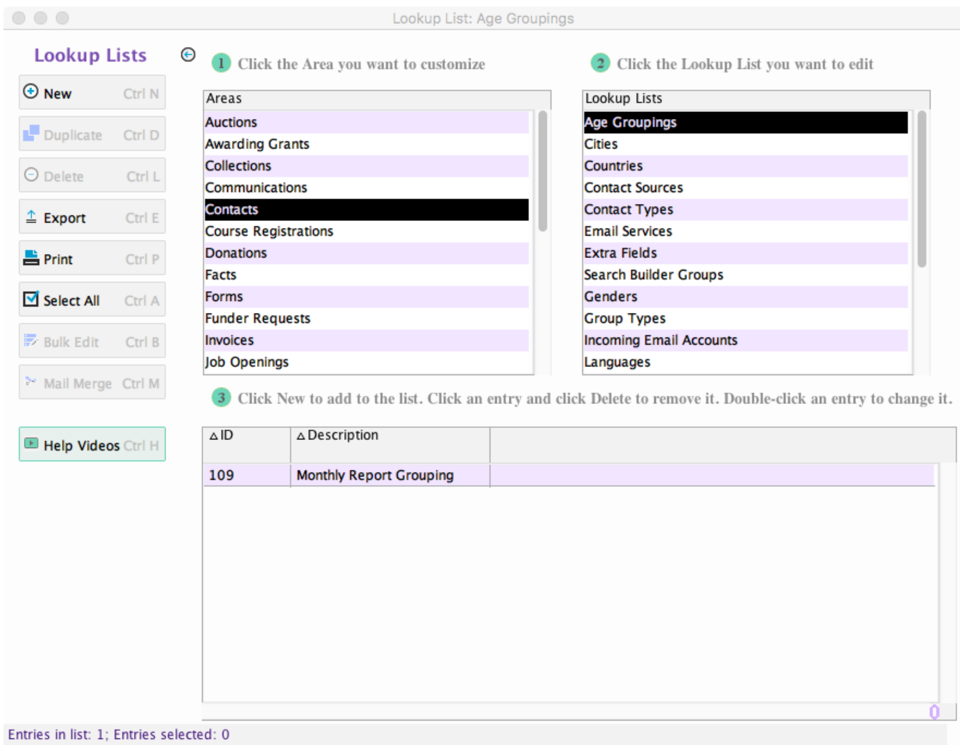
Appendix C – Lookup Lists

Introduction

> Hint: Do not put entries into lookup lists unless you are sure that they will be used. It is easy to add a new entry later, if it turns out to be necessary. But having unused or marginally useful values in a lookup list slows down data entry and confuses users.

Lookup lists are used to ensure rapid, correct, uniform entry of information into a Sumac database. When a user is entering data into Sumac, there are many places where the user must choose an entry from a lookup list. For example, if the user is entering information about a DONATION, the user chooses the donation type from a drop-down menu of choices which come from a previously entered lookup list.

To change the values in a lookup list, choose the Utilities/Customize Database/Lookup Lists command in the Sumac console. This dialog appears:



The dialog shows lookup lists grouped by Areas which are listed in the top left of the window. Click to select an Area (e.g. Auctions is clicked in the picture above). All the lookup lists that support that Area appear in the Lookup Lists list to the right. Certain lists also allow you to add entries from within the relevant record window. Lists that allow this have a *New* option at the base of the expanded list. Select this to add a new entry.

Some lookup lists appear in more than one Area in the lookup list dialog. For example, COMMUNICATIONS, DONATIONS, and PLEDGES can all refer to event types, so the event types lookup list appears under all these Areas. But note that Sumac has only one list of event types; regardless of whether you change them from the COMMUNICATIONS area or from the PLEDGES area, you are working on the same list.

Click a lookup list (e.g. Age Groupings is clicked in the picture above). The values for that lookup list appear in the bottom scrolling list.

When you have chosen a particular lookup list, you can use standard list manipulation techniques for scrolling in the list, double click to edit an entry in a list, or use these buttons below the list:

Button	*Usage*
New	Click this button to create a new entry in the list.
Duplicate	Duplicate the selected record.
Delete	Click to select some entries in the list, then click the Delete button to delete them from the database.
Export	Click this button to export all or the selected records to a text file.
Print	Click this button to print all or the selected records.
Mail Merge	Click this button to mail merge the selected records with a template. At present, this command is limited to Courses and Sessions, enabling the creation of a course catalog.
Select All	Select All entries showing in the list.

In addition, most Sumac lookup lists can hold multilingual strings. The language variants are separated by ^ characters. Sumac expects the languages as follows: *English*^*français*^Es*pañol*. Any language can be omitted, for example: *English*^^Es*pañol*. Sumac shows each user the language variant that corresponds to the language he or she has chosen.

Here are descriptions of the lookup lists in Sumac. The following sections are arranged alphabetically. Each section describes the content of a lookup list.

Address Checking Services

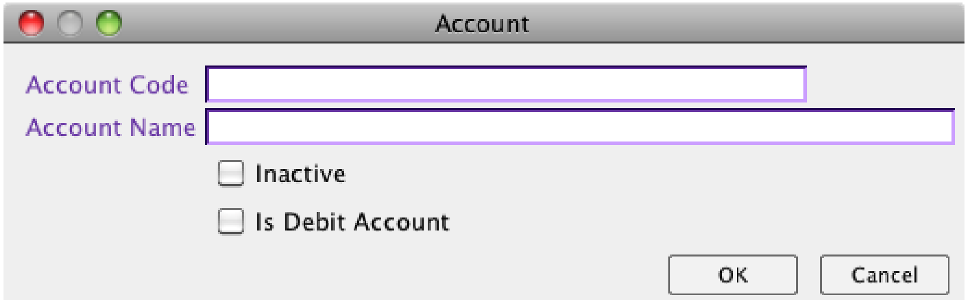
Found in: CONTACTS

Sumac integrates with the address checking service Quadient Data Services (formerly Satori). Quadient allows you to validate individual addresses in your database before sending out a mailing to a contact. Quadient is a separate service with a unique fee structure for their services. You must call Quadient and specify that you would like a license for use with Sumac before you are able to set up this integration. Once you have obtained your credentials, you are able to input them into this lookup list dialog by clicking New.

Accounts

Found in: AUCTIONS, AWARDING GRANTS, COURSE REGISTRATIONS, DISBURSEMENTS, DONATIONS, INVOICES, MEMBERSHIPS, PAYMENTS, PLEDGES, PRODUCTS, SALES, TICKETS

The accounts, defined in this lookup list, enable Sumac to provide information about financial transactions to your organization's accounting software.



When you add an account to this lookup list, you enter two pieces of information:

- The code that is used by your financial accounting software.
- A name which is presented to users of Sumac so that they can make the appropriate choice.

Accounts and QuickBooks Classes

In addition to accounts, QuickBooks supports classes – an extra way to classify transactions. When you export transactions from Sumac to QuickBooks, Sumac can tell QuickBooks which class the transaction belongs to.

You specify a class by defining an account with an Account Code field that includes a class. The account code field would contain first the account, then a vertical bar |, then a QuickBooks class. For example, here are two accounts – the Pledge Revenue account, one attributable to the Chicago class and another attributable to the Toronto class:

- PledgeRev|Chicago
- PledgeRev|Toronto

If a transaction being sent from Sumac to QuickBooks uses an account with a class in its account code field, then Sumac tells QuickBooks about both the account and the class.

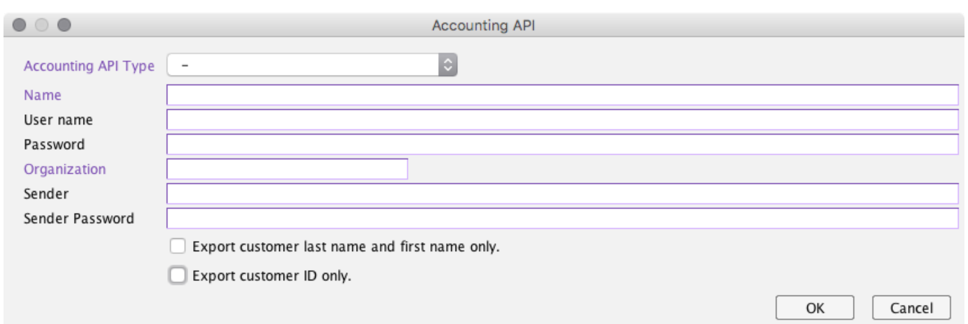
Note that a Sumac account can be defined with just a class, no account number, in its account code field. For example, its account code may contain:

- |Toronto

In this situation, Sumac would tell QuickBooks about the class without an account. This type of account can then be selected for a fee in an invoice.

Accounting API

Found in: INVOICES, PAYMENTS



Sumac can integrate with other accounting systems using the proprietary integration API (application programmer interface) provided by the accounting system. You need to specify how Sumac should connect to each accounting system.

Field	*Contents*
Accounting API Type	Sumac supports the following APIs: ◆ Intacct ◆ QuickBooks Online ◆ QuickBooks Desktop.
Name	The name by which you will refer (in drop-down menus) to this API connection
User name	ID of a user of the accounting system.
Password	Password of a user of the accounting system.
Organization	Your organization code when connecting to the accounting system.
Sender	ID of who is sending data to the accounting system.
Sender Password	Password of who is sending data to the accounting system.
Export customer last name and first name only	Format of names for contacts being sent, as customers, to the accounting system.
Export customer ID only	Format of names for contacts being sent, as customers, to the accounting system.

Intacct

Field	*Contents*
Accounting API Type	Choose: Intacct
Name	The name by which you will refer (in drop-down menus) to this API connection
User name	Your user id to access your Intacct company
Password	Your pasword to access your Intacct company
Organization	Your organization ID to access your Intacct company
Sender	registered sender id provided to you by Intacct to post to the XML Gateway
Sender Password	The registered password provided to you by Intacct
Export customer last name and first name only	Not supported in this integration
Export customer ID only	By default when exporting a contact the format is: contact ID-last name, first name If this checkbox is checked then the format becomes: contact ID

QuickBooks

If you want Sumac to connect to QuickBooks Online, then your database connection needs to be encrypted using TLS. See the Sumac Administrator Manual for details on setting up an encrypted database connection.

Field	*Contents*
Accounting API Type	Choose one of: ◆ QuickBooks Online ◆ QuickBooks Desktop.
Name	The name by which you will refer (in drop-down menus) to this API connection
User name	Leave this field blank.
Password	Leave this field blank.
Organization	Your organization code when connecting to the accounting system.
Sender	Leave this field blank.
Sender Password	Leave this field blank.
Export customer last name and first name only	By default when exporting a contact the format is: contact ID-last name, first name If this checkbox is checked then the format becomes: last name, first name
Export customer ID only	Leave this field blank.

Acquisition Status

Found in: COLLECTIONS

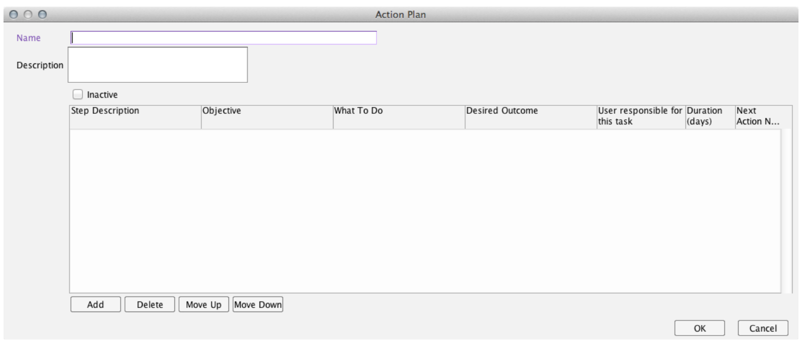
This lookup list specifies possible values for the acquisition status of a collection object.

Action Plans

Found in: INVOICES, PAYMENTS, REMINDERS

If your organization uses standard work flows – sequences of steps to be performed, perhaps to process credit card expirations, to solicit DONATIONS, renew MEMBERSHIPS, or to run a CAMPAIGN – an action plan enables you to repeatedly perform these in the same way.

Click the New button to get this dialog for defining a new action plan:

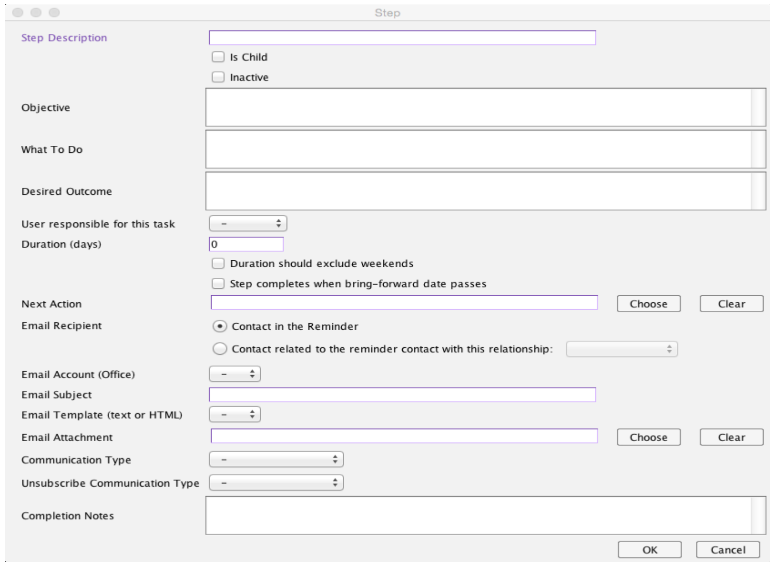


Enter a brief name and longer description for the action plan. If an action plan should not be used (perhaps it is obsolete, or you are just starting to create it), click *Inactive*.

Then create the list of steps to be performed in the action plan. The list of steps is ordered, i.e. the sequence they appear within the action plan is the order in which they are expected to be performed. If you would like to re-arrange the order of the steps in your action plan, you can click and drag the steps into a different order. There are four buttons for managing the list of actions in an action plan:

Add	Create a new step
Delete	Delete the selected step
Move Up	Move the selected step up in the list
Move Down	Move the selected step down in the list
Duplicate	Make a copy of the selected step in the list

When you click Add, the following dialog appears for creating a new step:



Fill in the various fields:

- *Step Description* is a short description of the action.
- Check *If Child* if this step is part of a larger sequence of steps
- Check *Inactive* to mark this step as inactive in the action plan
- *Objective* is what the action is trying to accomplish.
- *What To Do* describes the actual activities to be performed. The content of this field is put into the What To Do field of REMINDERS that are created from this action.
- *Desired Outcome* describes where a user should be in performing the action plan once this action is completed.
- *User Responsible for this Task* is where you tell Sumac which user should be automatically assigned to a task. Leave blank if no one is to be assigned
- *Duration* and corresponding check boxes indicate how long Sumac will wait to show this step after the previous one has been completed.

Step Automation

Sumac supports a level of automation. If a step entails sending an email, the automation works like this:

If a selected reminder is at or past its Bring Forward date, and you click the Complete Steps command, then Sumac does the following actions:

- Send an email: If there is an *Email Template* and *Email Subject* in the current step, then Sumac uses that template to generate and send an email to the contact connected to the reminder. If the step has an Email Account (Office), then the SMTP settings and sender of that office will be used to send the email. If the step has an Email Attachment, then the attachment file will be attached to the email before it is sent
- *Designate recipient*: Sumac allows you to decide who to send your email to through an action plan. Chose to send it to the contact in the reminder, or to related contacts.
- Create a communication record: If there is a *Communication Type*, then Sumac creates a communication record of this type for the contact connected to the reminder
- Move to next step: Sumac moves the reminder forward to the *Next Action*.

- Assign user: If the next step specifies a *User responsible for this task*, then Sumac changes the responsible user for the reminder.
- Change bring forward date: The bring forward date of the reminder is set to the current date plus the *Duration (days)* in the next step to be performed.

Action Types

Found in: REMINDERS

Action Types are associated with reminders. Each REMINDER can indicate the type of action (e.g. phone call, email) that is needed to finish the REMINDER.

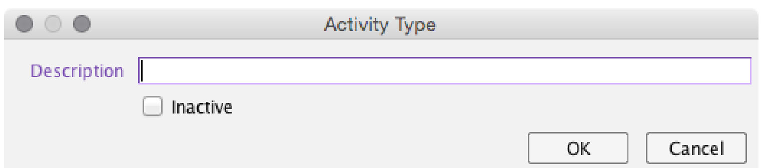
Suggested Values

email
letter
lunch
phone

Activity Types

Found in: TIME DOCKETS, VOLUNTEERS

This list enables you to specify the type of activity that was performed in a particular time docket or volunteer task.



If you mark an activity type as inactive, then it no longer appears as a choice when you are editing tasks.

Adjustment Reasons

Found in: SALES, TICKETS

If the value of a TICKET ORDER needs to be adjusted, then an adjustment reason must be specified. The user making the adjustment can manually enter the reason for the adjustment, or alternatively can just choose one from this lookup list.

Age Groupings

Found in: CONTACTS

Age groupings tell Sumac how to group contacts by age when performing a quick count report in the contact list. You can set up to 10 age ranges per grouping. Each age range requires a minimum and maximum age.

Asset Types

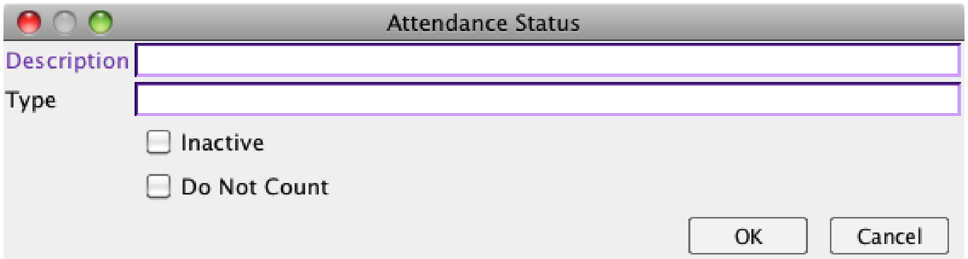
Found in: FACTS

You can specify Asset Facts for CONTACTS. This lookup list indicates the types of assets you wish to record.

Attendance Statuses

Found in: COURSE REGISTRATIONS

In the Course Registration module, you can indicate that attendance status (attended, absent, absent with an excuse) of each student at each class. This lookup list is the possible statuses.



If you mark an attendance status *Inactive*, you are indicating that it should not be used anymore. It will no longer appear in menus where attendance statuses are chosen.

If you mark an attendance status *Don't Count* you are indicating that attendance of a particular student at a class should not count in statistical summaries (e.g. calculating what percentage of classes a student attended).

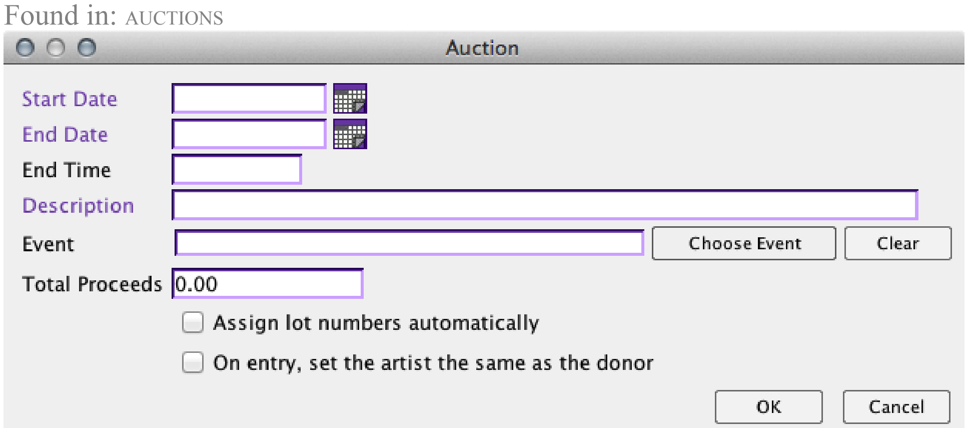
Auction Categories

Found in: AUCTIONS

These categories are used to specify the category of a particular lot in an auction. The categories depend on the types of auctions that your organization performs. If it is an art auction, then the categories might be: three dimensional, master works, glass, and oil. If it is a general merchandise article, categories might be: sports equipment, entertainment, books & videos.

Auctions

Found in: AUCTIONS



Define each auction. Indicate its start and end date and a brief description. This description will be used in drop-down menus for adding lots to the auction.

If you want, Sumac can automatically assign lot numbers as lots are entered. If you do not check this option, then you must manually assign lot numbers.

When entering lots, in some types of auctions you specify a donor and an artist who are usually the same. In this case, click to have Sumac automatically set the artist the same as the donor (this can be over-ridden for any particular lot).

If you connect the auction to an event, you can then search for lots by event.

Award Types

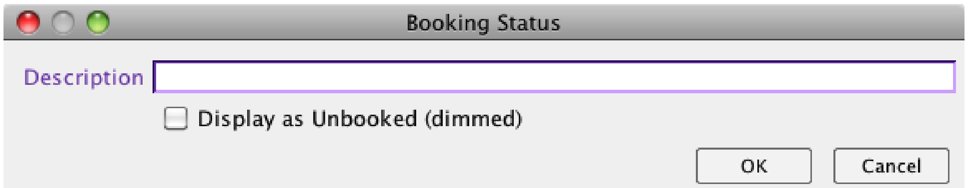
Found in: Facts

When a user enters award facts into contact records, this drop-down menu can be used to standardize the entry of the type of award that was received.

Booking Statuses

Found in: Tour Bookings

Booking statuses apply to Tour Booking programs.



Enter a description of the booking status. A program with this booking status can be displayed differently (dimmed or grey), if you click the check box; this is used to indicate a tentative or planned, but not yet confirmed, booking.

Buildings

Found in: Collections

These are buildings that can store collection objects.

Curatorial Note Categories

Found in: Collections

In the Collections module, if you need to classify curatorial notes, you can use these categories. Each curatorial note can be in several categories.

Category As, Bs, Cs, and Ds

Found in: Tour Bookings

These four categories are used to describe various attributes of Tour Booking programs. The Utilities/Customize Database/Preferences command in the Sumac console can be used to give them more meaningful names, or to exclude them from use.

Category A entries show up as check boxes, so each program can have any number of attributes from Category A.

Categories B, C, and D appear in the user interface as drop-down menus, so each program may have at most one attribute from these lists.

Cities

Found in: Contacts

When a user enters a contact into Sumac, the user typically enters one or more mailing addresses for the contact. These addresses contain cities.

Entering the names of cities can be made speedier and more accurate by using the lookup list of city names. If a user types a partial city name, Sumac fills in the full name. For example, if the city list has these names:

Boston
New York
Seattle
San Francisco
Saskatoon

Toronto
Vancouver

type *t* to get Toronto. Note that with this list, the user would have to type *se* to get Seattle, and *san* or *sas* to get San Francisco and Saskatoon respectively.

Club Types

Found in: FACTS

Users can enter facts about CONTACTS. One type of fact is clubs that the CONTACT has been a member of. Club memberships can be of a certain type. The types are chosen from this lookup list.

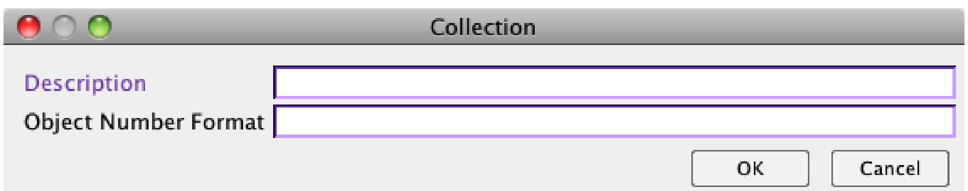
Suggested Values

4H
Kinsman
Rotary
Scouting
Shriners

Collections

Found in: COLLECTIONS

Specify the name of the collection.



If you want to specify the format of object numbers that should be used for the collection, you enter the pattern, that the object numbers should match, into the Object Number Format field. Here are things that you can use to specify a pattern:

Backslashes, escapes, and quoting

The backslash character (\) serves to introduce escaped constructs, as defined in the table above, as well as to quote characters that otherwise would be interpreted as unescaped constructs. Thus the expression \\ matches a single backslash and \{ matches a left brace.

Characters

`x`	The character *x*
`\\`	The backslash character
`\.`	The dot (period) character

Sequencing

<table>
<tr><td><code>XY</code></td><td>X followed by Y</td></tr>
<tr><td><code>X|Y</code></td><td>Either X or Y</td></tr>
</table>

Character Classes

`[abc]`	`a`, `b`, or `c` (simple class)
`[^abc]`	Any character except `a`, `b`, or `c` (negation)

`[a-zA-Z]`	`a` through `z` or `A` through `Z`, inclusive (range)
`[a-d[m-p]]`	`a` through `d`, or `m` through `p`: `[a-dm-p]` (union)
`[a-z&&[def]]`	`d`, `e`, or `f` (intersection)
`[a-z&&[^bc]]`	`a` through `z`, except for `b` and `c`: `[ad-z]` (subtraction)
`[a-z&&[^m-p]]`	`a` through `z`, and not `m` through `p`: `[a-lq-z]`(subtraction)

Predefined character classes

`[abc]`	`a`, `b`, or `c` (simple class)
`.`	Any character (may or may not match line terminators)
`\d`	A digit: `[0-9]`
`\D`	A non-digit: `[^0-9]`
`\s`	A whitespace character: `[ \t\n\x0B\f\r]`
`\S`	A non-whitespace character: `[^\s]`
`\w`	A word character: `[a-zA-Z_0-9]`
`\W`	A non-word character: `[^\w]`

Greedy quantifiers

`X?`	*X*, once or not at all
`X*`	*X*, zero or more times
`X+`	*X*, one or more times
`X{n}`	*X*, exactly *n* times
`X{n,}`	*X*, at least *n* times
`X{n,m}`	*X*, at least *n* but not more than *m* times

Reluctant quantifiers

`X??`	*X*, once or not at all
`X*?`	*X*, zero or more times
`X+?`	*X*, one or more times
`X{n}?`	*X*, exactly *n* times
`X{n,}?`	*X*, at least *n* times
`X{n,m}?`	*X*, at least *n* but not more than *m* times

Example

Here is a pattern that allows one to three digits, followed by a period, followed by one to two digits:

```
[0-9]{1,3}\.[0-9]{1,2}
```

Colours

Found in: COLLECTIONS

Colour is one of the physical attribute of collection objects. This attribute is chosen from a drop-down menu showing colours in this lookup list.

Communication Contents

Found in: facts

Users can enter Preferred Content facts for each contact. This preferred content indicates the type of communications (e.g. monthly newsletter, annual report, event announcement) that the contact wishes to receive.

Communication Media

Found in: facts

Users can enter Preferred Medium facts for each contact. This preferred medium indicates the medium on which the contact wishes to receive information.

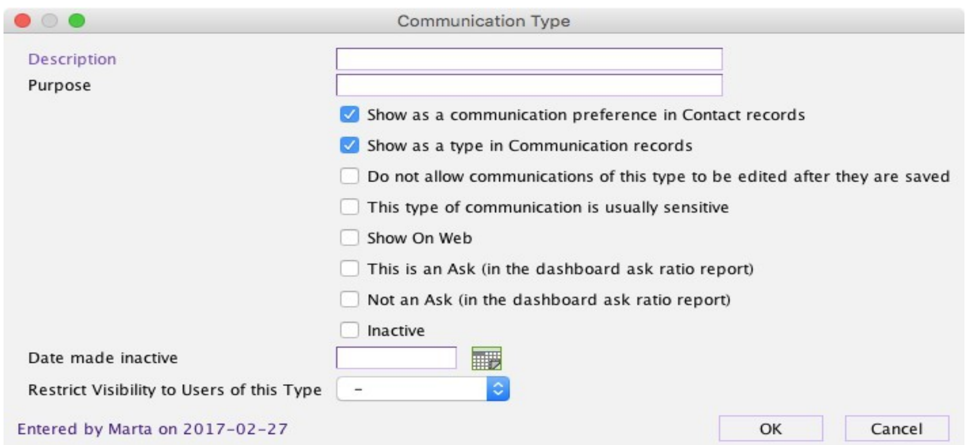
Communication Types

Found in: communications and contacts

Communication types are used in two ways:

- Sumac can record information about every communication that occurs with a contact. Every communication must be of some particular communication type.
- You can specify the types of outbound communications that each contact wants to receive. This ensures that you do not send your contacts unwanted information, and also saves you the cost of sending information that will be ignored.

Here is the dialog for entering a new communication type:



When you enter a communication type, you specify its name and purpose.

Then use the next two checkboxes to indicate how the communication type should be used:

- It is a communication preference in contact records. Usually these are outbound communications (e.g. Newsletter, Solicitation) and they appear in the Communications Preferences area of a contact record.
- It can appear in communication records. These communication types record communication that occurred with a contact, and include both inbound and out-bound communications.

If you use Sumac to store case notes or similar documentation about clients, the notes may be subject to rules regarding editability. If these types of communications should not be editable once they have been entered, then select *Do not allow communications of this type to be edited after they are saved*.

If this type of communication should normally be made sensitive, then click *This type of communication is usually sensitive*. This causes Sumac to mark the communication as sensitive.

Display on web is used to indicate that a contact using your website to change his or her personal details should be able to edit this communication preference.

This is an Ask and *Not an Ask* checkboxes are used in the Ask Ratio dashboard. It counts communications that are marked as asks or not asks, and displays the ratio between the two.

You can mark communication types as inactive and record the date this was done. Inactive communication types do not appear in drop-down menus, and the group of Communication Preference checkboxes in contact records shows them disabled (grey).

Use the drop-down menu of user types to specify that only users of a certain type are allowed to see communications of this type. For example, if you record communications of type “Medical Note”, you might want to specify that communications of that type can only be viewed by users of type “Medical Staff”. This provides an extra level of control over information-hiding security.

Suggested Values

Note that some are inbound and some are outbound. Note, also, that some identify media while others identify specific documents (the latter is preferred). Some organizations produce several special interest newsletters, each of which could be added to this list.

Outbound communications

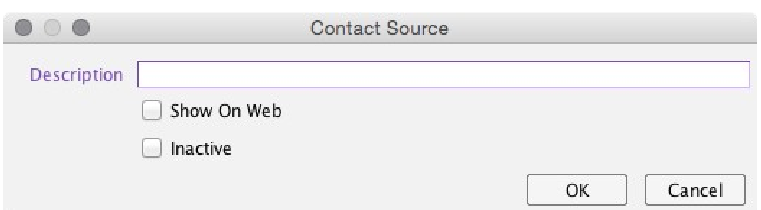
Annual Report	Newsletter
Direct Mail	Phone
Email	Quarterly Report
Fax	Upcoming Event Notice

Inbound communications

in-mail	in-email
in-phone	in-attendance

Contact Sources

Found in: CONTACTS



How did a CONTACT first get in touch with your organization? When you add a CONTACT to the database, you can indicate this useful piece of market analysis information by choosing from a lookup list.

This list of contact sources specifies the possible sources that, perhaps, your marketing department wishes to track.

Note that you can specify that a contact source is inactive if you no longer want users to be able to choose it.

If your Sumac database is integrated with your website, you can also specify which contact sources should be presented to your website users.

For recording the source of a TICKET ORDER or COMMUNICATION, see *Source* on page 648.

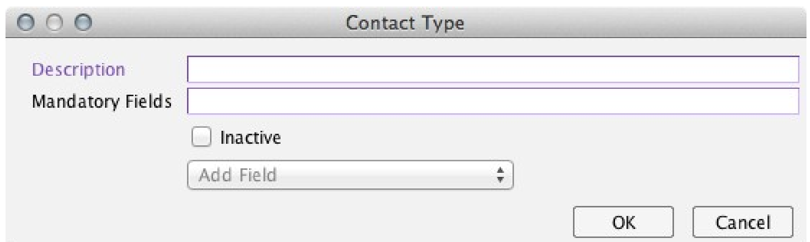
Suggested Values

These suggested values are generic types of sources for contacts. The values can also be the names of individuals if all the contacts were sourced by a limited number of named individuals. It may also be appropriate to be more specific than these listed entries (e.g. Telethon-Spring and Telethon-Autumn).

Advertising	List Exchange
Canvassing	Recruitment
Direct Mail	Telethon
Event Attendance	Word of Mouth

Contact Types

Found in: CONTACTS



Each CONTACT in the database may be of one or more types. For example, the CONTACT may be a volunteer and a board member. This list lets you specify the type information you want to track in your database. The CONTACTS list allows you to show all the CONTACT types applicable to any particular CONTACT, and also to search and instantly show all CONTACTS of a particular type.

If you want to specify that some fields are mandatory for a contact of this type, enter the names of the mandatory fields (separated by commas) in the *Mandatory Fields* field. You can use the *Add Field* drop-down menu to save typing time.

If you click the Inactive checkbox, then this contact type appears disabled (grey) in contact records. This means that no contact can be given this contact type; but any contact who already had this contact type, remains unchanged.

Suggested Values

This list can quickly become very long. Don’t clutter up the list with entries that you cannot use. Insert only entries that you will be able to enter for each contact, and you will be able to use in your activities.

regular database	*media database*
Affiliate Alumni Board member Community Consultant Contract employee Corporate foundation Corporate sponsor Employee Past Employee Foundation Government Government Funder Media Past Board Member Patron Politician Subscriber Supplier Umbrella group VIP Volunteer	Magazine, Electronic Magazine, Paper Newspaper, Daily Newspaper, Weekly Newspaper, Monthly PSAs, Radio PSAs, Television PSAs, Print Radio Television Website

Content Types

Found in: COLLECTIONS

When you enter a media attribute for a collection object, you must specify the type of content in the media. For example: biographical, primary content, photo, descriptive.

Contribution Types

Found in: TOUR BOOKINGS

Tour Booking programs can have a list of one or more sponsors. The type of contribution made by each sponsor (e.g. cash, services, facilities) can be specified by choosing from this lookup list.

Countries

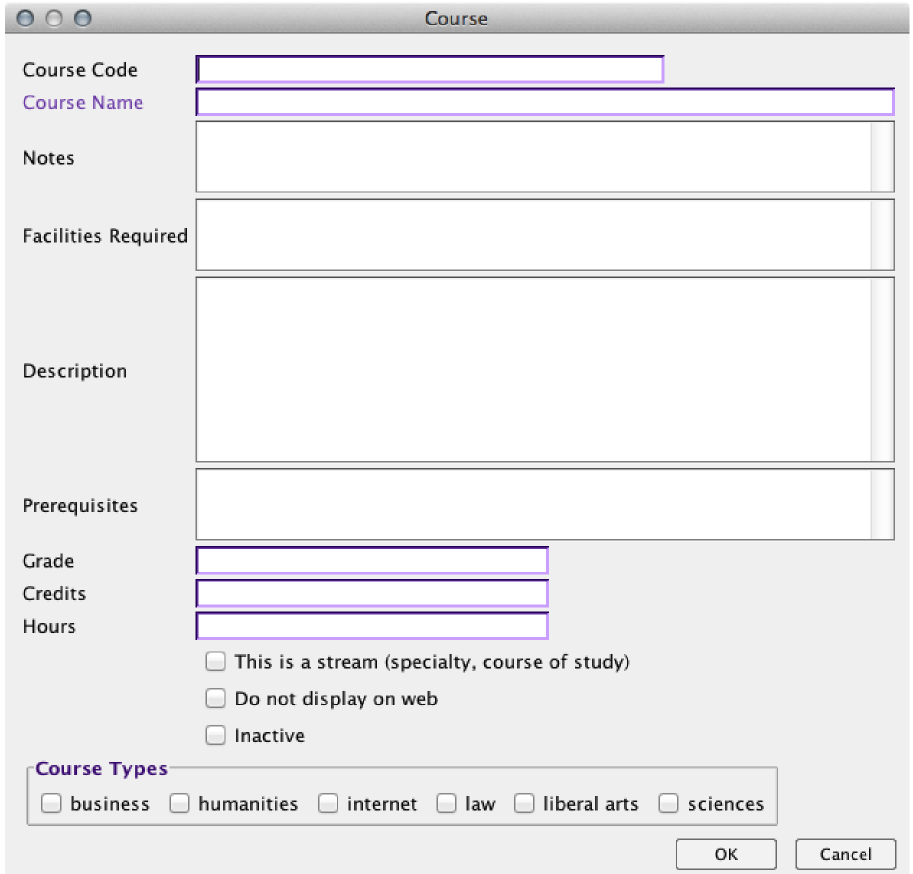
Found in: CONTACTS

When entering mailing addresses in CONTACT records, there is a drop-down menu of country names. These come from this lookup list.

Courses

Found in: COURSE REGISTRATIONS

This list contains the courses for which course registration can be performed.



The *Hours* fields is used to indicate how many credit hours a student receives. You can use checkboxes to specify the course types that apply to this particular course.

You can mark a course to indicate it is a stream, i.e. a specialty or course of study. When a course is a stream, sessions of that course can specify the sessions that are part of the stream and any applicable special pricing for them.

To enable Sumac to enforce a grade requirement, enter the grades that a student must be in to take this course. You can enter a list of grades separated by commas:

4,5,6

or ranges of grades separated by a dash:

4-6

or both:

1-4,6-7

Course Types

Found in: COURSE REGISTRATIONS

This is a list of types of courses. These types are used to group courses into broad areas. The web interface to course registration allows a student to search courses based on course types.

Currencies

Found in: DONATIONS

You may receive the donation in a foreign currency, which you convert to your own currency. Create a Currency record to specify the incoming currency and the conversion factor.

Curatorial Note Types and Categories

Found in: COLLECTIONS

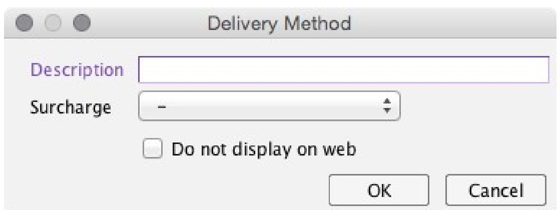
When entering a curatorial note about a collection object, these lists let you characterize the general nature of the curatorial note.

Suggested Values

Condition

Delivery Methods

Found in: SALES, TICKETS



This is a list of methods used to deliver TICKET ORDERS to CONTACTS.

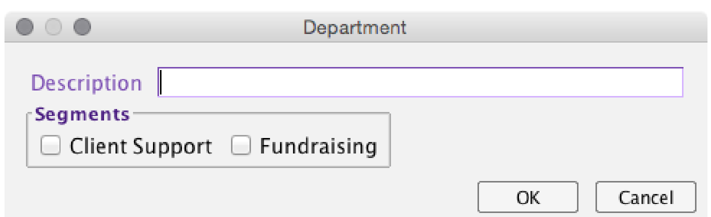
If a delivery method incurs a surcharge, the choose the surcharge from the drop-down menu.

Suggested Values

FedEx
Post
UPS

Departments

Found in: TIME DOCKETS, VOLUNTEERS



A department is a part of your organization, or one of the types of services your organization performs. TASKS to be performed can be associated with a particular department. This provides a convenient break-down, enabling you to organize and search for tasks based on which part of your organization performs or manages the tasks.

If your database divides its contacts into segments, you can indicate that a particular department should only appear for users who can see specific segments.

Disciplines

Found in: SUBMISSIONS, TOUR BOOKINGS

This lookup list specifies the discipline or expertise of a CONTACT making a SUBMISSION.

Suggested Values

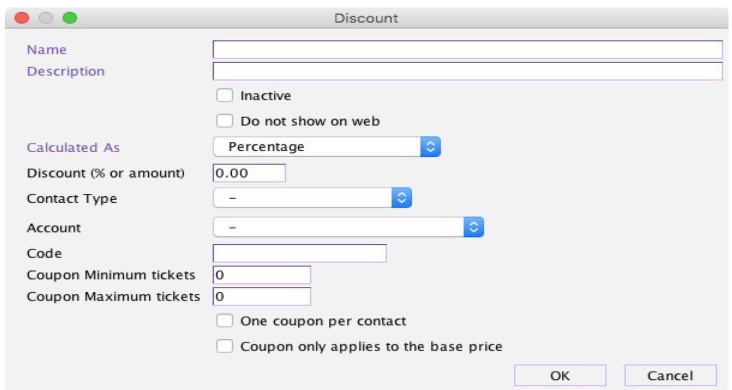
Here is a list of values is appropriate for a theatre company.

Actor	Guest Artist
Actor, Emerging	Lighting Designer
Assistant Director	Musician
Choreographer	Playwright
Composer	Props
Costume designer	Set Designer
Dancer	Sound Designer
Dramaturge	Stage Manager

Discounts

Found in: COURSE REGISTRATIONS, INVOICES, SALES, TICKETS

Discount rates can be applied to products, tickets or course registrations.



Note that when a discount is no longer being used, you can mark it as Inactive. An inactive discount no longer appears in drop-down lists of discounts, so users cannot apply it to a ticket order or sale.

You can also indicate that a discount should not be displayed on the web. This applies to online ticketing. If you want to make certain discounts available only to people who call in to your box office, not to those who order tickets over the web, then set this check box.

Select the way you want Sumac to calculate this discount when it is applied. The discount can be a fixed amount per item or per order. Additionally, a discount can be applied as a percentage.

If this discount rate should be available only to contacts with a specific contact type, choose the applicable contact type from the Contact Type drop-down menu.

The account is used when this discount is added to Ledger Entries.

If you set the *Coupon only applies to the base price* checkbox, then this discount is applied only to undiscounted tickets.

Coupons

Coupons are discounts available in ticket orders. They can be entered both from within Sumac, and from your website. Coupons are calculated for each ticket, and can be calculated as a percentage of the ticket price, or a fixed discount per ticket.

You can specify that the coupon be applied to a minimum and a maximum number of tickets. For example, if the patron must buy at least two tickets and can only get the discount on up to six tickets, then the minimum and maximum are *2* and *6* respectively.

Coupons versus Price Scheme Discounts

When setting up a pricing scheme, you use discounts to define price levels at which people can buy tickets: e.g. Senior, Student, Regular Adult, Member. These establish price points that would be available throughout the time period of tickets being purchased, and often for many performances (e.g. all weekday evenings and matinees).

In contrast, coupons tend to be used for two things:

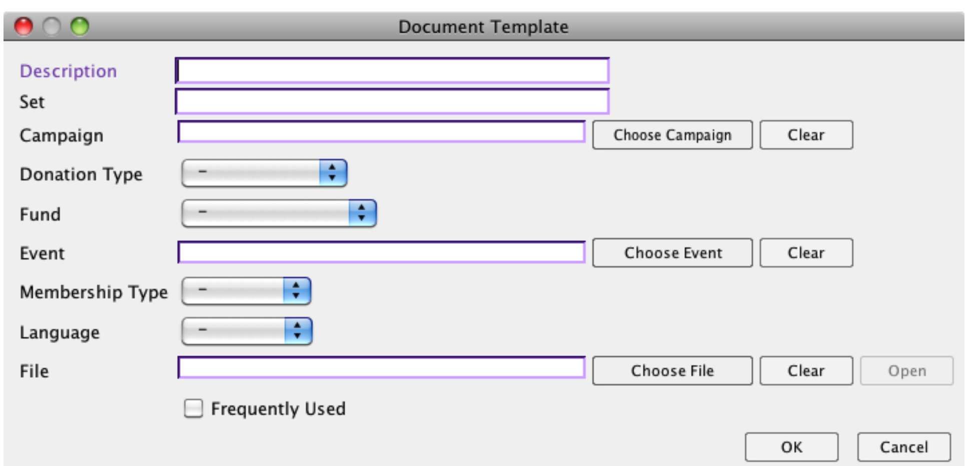
- Discounts that are temporary promotions: e.g. order at least two weeks before the performance and you can use this 10%-off coupon.
- They help you track which media are most effective. For example, you can use one coupon code in a magazine, and another in the newspaper, then see which coupon gets used. This tells you if people see and act on your advertising in those media.

In addition, coupons can add a few requirements for buyers: e.g. they must buy at least three tickets to get this coupon discount, whereas discount levels in a price scheme are unrestricted. Also, coupons can be applied to a single performance, and even removed when the performance starts to get booked up, whereas price schemes usually apply to several performances.

Document Templates

Found in: COLLECTIONS, COMMUNICATIONS, COURSE REGISTRATIONS, DONATIONS, FORMS, MEMBERSHIPS, PLEDGES, REMINDERS, SALES, TICKETS, TOUR BOOKINGS, VOLUNTEERS

Document templates stored in Sumac are actually references to document template files stored in the file system on your computer or a server. This list is used for sending standardized COMMUNICATIONS based on MEMBERSHIP types. It is also used to relate a document template to an action in an action plan.



The minimum information that you should specify in a document template is the Description, and the document itself (click Choose File to set the File System Path field). If you have clicked to choose a file, you can click the Open button to cause Sumac to open the file using the standard editor for the type of document chosen.

The rest of the fields are specified in order to enable Sumac to pick the correct template from a set of templates. Here is how sets of templates work:

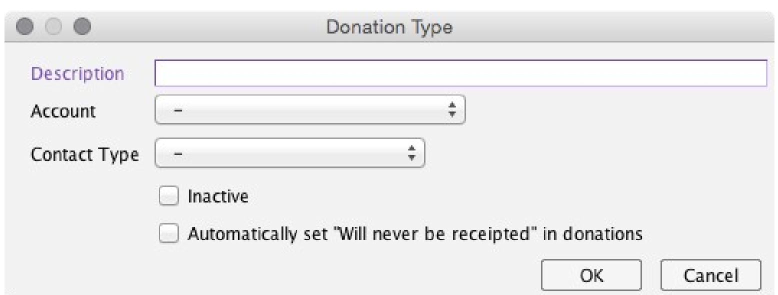
- At present, the only context in which Sumac can automatically choose document templates from a set is when it is generating receipts for donations. Consequently, the Membership Type drop-down menu is always ignored.

  Hint: You must tell Sumac to prompt users for a set of templates when the user is creating donations. You do this by choosing the Utilities/Customize Database/Preferences command in the Sumac console, choosing the Mail Merge tab, and clicking the appropriate option to turn on sets of templates.

- Specify the same Set name for several templates that are to be treated as a set. At the time a user generates donation receipts, the user is asked to pick a set of templates.
- Choose values for the the document template fields which describe the types of DONATIONS to which the document template applies. For example, if you have two templates, one for French and one for English, specify the two templates to have the same Set, but in the Language drop-down menu choose French for one and English for the other.
- Note that if you specify a field in a document template, then Sumac only matches it to DONATIONS that have the same value for the field. Be careful to make sure that there is always an applicable template. For example, if you specify one template for English and another for French, what would happen if no language is specified for a CONTACT? In this case you would need a third template that has no language specified. Alternatively, you could remove the language specification for one of the two templates (e.g. the English one), thereby making it apply to all DONATIONS other than those from French CONTACTS.

Donation Types

Found in: DONATIONS, PLEDGES



Type of DONATION indicates a general class for the DONATION. This is used to provide a general break-down of the DONATIONS, particularly useful in summarizing and reporting. When entering a DONATION type, the possible values come from this lookup list.

If you specify that the DONATION type relates to a particular account, then as a user enters a DONATION and chooses the DONATION type, Sumac automatically chooses the account. This saves data entry time.

If you choose a contact type then, when entering a donation, when you choose the contact, Sumac looks at the contact's contact types, and if one of them corresponds to a donation type, the donation is set to this donation type.

If you mark a donation type as Inactive, then a user entering a new donation will not see this particular donation type in the drop-down menu of choices.

If a certain type of donation is never receiptable, click the checkbox to specify that whenever this donation type is chosen, Sumac should click the “Will never be receipted” checkbox.

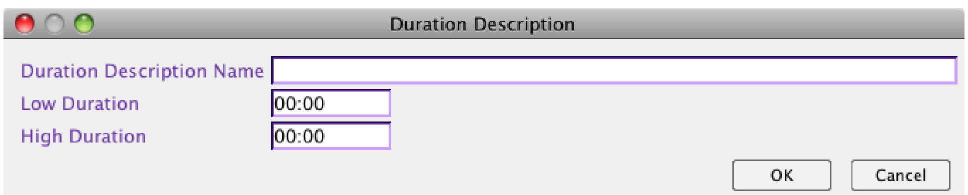
Suggested Values

Bequest
Corporate
Endowment
Foundation
Government
In-kind
Individual
Member Gift
Membership Renewal
Memorial Gift
Subscription Gift

Membership Renewal is appropriate to indicate that the Donation was received as part of a membership renewal. This is a appropriate if your organization uses the Sumac Membership module.

Duration Descriptions

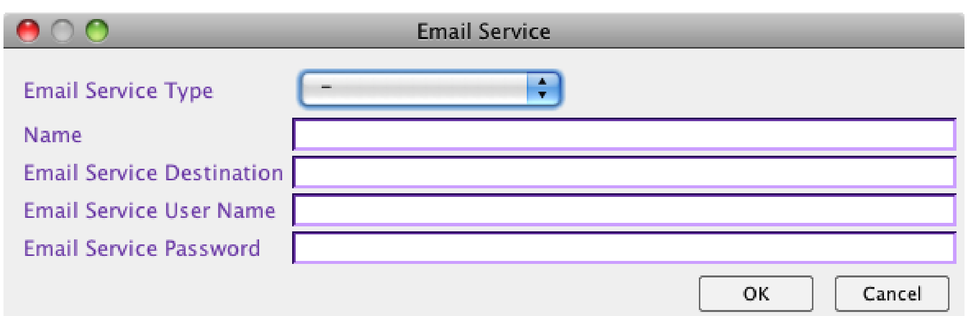
Found in: TOUR BOOKINGS



Tour Booking workshops are listed within their program. Their times and durations are displayed. If you want Sumac to automatically categorize the workshops, providing a name based on their duration, you can specify the durations. For example, if a workshop that is between 2.5 and 4 hours is considered to be a half day, you could give it a description of “half day” and enter 2:30 and 4:00 as the applicable durations.

Email Services

Found in: CONTACTS



If you want to use a third party product for sending email to the CONTACTS in your Sumac database, define an email service.

If any email services have been defined then, when a user clicks the Export button in the CONTACTS list, the user is given the option of sending the CONTACTS to an external email service.

Constant Contact

Here is how you fill in the fields in an Email Service record to make it work with Constant Contact.

Email Service Field	*Contents*
Email Service Type	Choose *Constant Contact*.
Name	This is the name that you use to identify this particular email service. You may have several different Constant Contact lists, and this enables you to distinguish one from another.
Email Service Destination	This is the name of the list defined within Constant Contact.
Email Service User Name	Your Constant Contact user name.
Email Service Password	Your Constant Contact password.

CQRC Engage

Here is how you fill in the fields in an Email Service record to make it work with Constant Contact.

Email Service Field	*Contents*
Email Service Type	Choose *CQRC Engage*.
Name	This is the name that you use to identify this particular email service. You may have several different CQRC Engage lists, and this enables you to distinguish one from another.
Email Service Destination	This is a tag name associated with advocates on CQRC engage. You can enter any text in this field.
Email Service User Name	Your CQRC Engage API User Name. You obtain this from your CQRC representative.
Email Service Password	Your CQRC Engage API Password. You obtain this from your CQRC representative.

Inserting Advocates into CQRC Engage

To insert an advocate you must include either:

- a valid email address, or
- a first name, last name, and postal code.

Additional data format restrictions:

- Postal Codes must be five or nine digits the the advocates country is US or unspecified.
- Phone Number must be at least ten digits

MailChimp

Here is how you fill in the fields in an Email Service record to make it work with MailChimp.

Email Service Field	*Contents*
Email Service Type	Choose *MailChimp*.
Name	This is the name that you use to identify this particular email service. You may have several different MailChimp lists, and this enables you to distinguish one from another.
Email Service Destination	This is the list ID defined within MailChimp
Email Service User Name	[not required]
Email Service Password	Your MailChimp API Key

Event Types

Found in: COLLECTIONS, COMMUNICATIONS, DONATIONS, PLEDGES, TICKETS

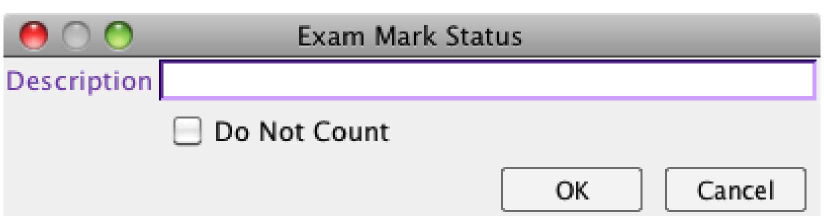
Sumac can help you keep track of events, and the responses to them. DONATIONS, PLEDGES, and COMMUNICATIONS can be associated with events. Each event must be of a particular type: perhaps a fundraising event, a performance, or a board meeting. This list of event types is where you indicate the possible types of events for your organization.

Suggested Values

- AGM
- Barbecue
- Bowling
- Cultivation
- Dinner
- Donor Appreciation
- Fundraiser
- Golf
- Performance
- Press Conference
- Opening
- Reading
- Soirée
- Sports Event
- Volunteer Appreciation

Exam Mark Statuses

Found in: COURSE REGISTRATIONS



The Sumac Course Registration module enables you to record marks for exams. Each mark can have a status, typically things like: final, interim, or under appeal.

If a mark status is marked as *Do Not Count*, this tells Sumac that when it is calculating final marks, the student's mark for this particular exam should not be part of the calculation.

Expenditure Types

Found in: FUNDER REQUESTS

As you spend grants received through a funder request, you can track expenditures. Each expenditure can have a type, chosen from this list.

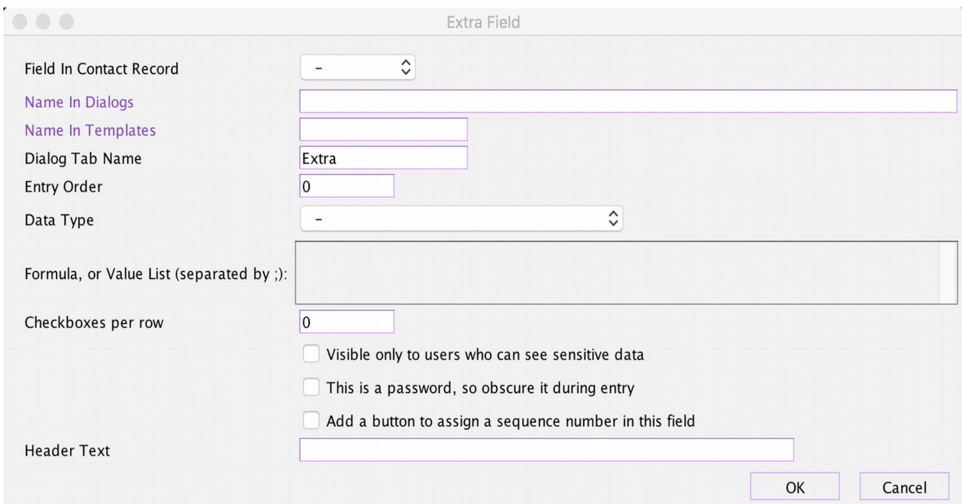
Extra Fields

Found in: CONTACTS

Sumac can hold extra fields of information, specially defined by your organization, for each CONTACT in the database. These fields can be used to store information that is not already specifically identified in the standard fields in Sumac CONTACT records. These fields can be used just like any other fields in a CONTACT record: for searching, entry, display.

Before you can put information into the extra fields, you must use the list of extra fields to tell Sumac what will be put into the extra field, and how it will be used.

When you define an extra field, it appears in one or more extra tabs in the dialog for editing each CONTACT. A user can navigate to this tab, and enter and edit information in each extra field. Extra fields can be presented in the user interface in several different ways. Here is the window for defining a new extra field:



For each extra field, you specify:

- Field in Record: Choose one of the extra fields. Until you allocate them to some purpose, they are given default names of Extra 1, Extra 2, etc.
- Name In Dialogs: Specify the label that will appear on this field in the dialog for editing CONTACTS, and in the list of field names used to import and export CONTACT information.
- Name In Templates: Specify the name that will be used to refer to this field when it is being used in a document template. Note that a name for use in a template must not contain spaces. Note that the name you enter here should not have a *c_* prefix, but when you use it in a template it must be prefixed by *c_*; e.g. if you enter *instrument* when defining the extra field, then the template must refer to *c_instrument*.
- Dialog Tab Name: You can group extra fields into different tabs in the contact editing dialog. Enter here the name of the tab. All extra fields whose dialog tab name is the same will be presented in the same tab of the contact dialog.
- Entry Order: Enter a positive integer to indicate the order that the field should appear within its tab in the contact dialog. Note that these numbers do not need to be sequential. It is often convenient to enter them 5 or 10 apart so that if you later need to insert a field between two others, you just

enter a number between the two rather than having to re-sequence all the fields.

- The Data Type drop-down list allows you to specify how the field should appear in the contact entry and editing dialog:

Data Type	*User Interface Presentation*
Text	A fairly short text field for free-format text.
Long Text	A text field presented in a box three lines high, with a scroll bar on the right hand side.
Date	A field for manually typing a date, and an icon for using a calendar to choose a date.
Number	A text field that must hold a number.
Checkbox	The field is presented as a check box. The field name appears as the label on the check box.
Drop-down Menu	A drop-down menu containing the choices specified in the Value List (see below). A user who chooses from this drop-down menu, is still able to edit the value given to the extra field. For example, if the user chose *flute* from a value list of musical instruments, the value of the extra field would be *flute*. But the user could then click and type in the field to change the value to *alto flute*, even though *alto flute* was not a choice available from the Value List.
Luhn Validated	A text field that must hold a number. The number is validated using the Luhn algorithm (which validates most credit card numbers, Canadian Social Insurance Numbers, and other ID numbers).
Checkbox Group	The field is presented as a set of check boxes. The check boxes can speed up entry into the extra field, and make display of the data more readable. The check boxes cause an entry into a text field, which is also visible. The text field is editable.
Checkbox Group, Uneditable Text Field	This field type is the same as Checkbox Group above, however the text field associated with the check boxes is *not* editable.
Schema	This field is to be chosen from a schema.
Text With Link Button	If you have text that you would like Sumac to treat as a hyperlink, use this field type. This results in a text field with a link icon beside it. When clicked, the link icon causes Sumac to take you to the webpage entered in the text field.

- For a field that is a Drop-down Menu or a Checkbox Group, the values in the menu or check boxes come from the Value List field. Each value is separated from the others using a semi-colon. Note that if the field is going to be displayed as checkboxes, you can also specify the number of checkboxes that should appear in each row.
- You can specify a formula to give the field a value. It is evaluated when one of the fields used by the formula changes. Formulas can be used to calculate a value for a field that holds a number, a Luhn-validated number, a schema entry (the formula should give the ID of the entry), or a date.
- Check the *Visible only to users who can see sensitive data* to restrict this field to only uses whose profile allows them to see sensitive data. This enables sensitive client information to be protected.
- Check the *This is a password field, so obscure it during entry* to show the content of this field as bullets, instead of the actual text that is in the restrict this field to only uses whose profile allows them to see sensitive data.
- An extra field in a contact record to be used for a sequentially assigned ID number. Note that every contact automatically has an ID assigned to it, but you may want some additional field for only some contacts (e.g. just clients) or want special control of number. Set the *Add a button to assign a sequence number in this field* checkbox to make the field into a user-controlled ID field. When the field is displayed in the window for editing a single contact, this type of field has an *Assign* button beside it. Click *Assign* to have Sumac enter the next number for this field.
- *Header Text* specifies a title that will appear in a large coloured font immediately above the extra field. This lets you group extra fields together for better visual presentation.
- *Segments*: Use these check boxes to specify which user segments are able to see an extra field. If all users can access, leave all unchecked. This is useful for restricting sensitive information from certain users.

Fee Descriptions

Found in: INVOICES

If you want to classify the fees in your invoices, using a non-accounting description, then enter the descriptions in this lookup list.

Feedback Sources

Found in: TOUR BOOKINGS

You can record feedback for each Tour Booking program. Each feedback entry can indicate its source.

Festivals

Found in: SUBMISSIONS

Each SUBMISSION must be associated with a festival – a grouping of SUBMISSIONS for a particular planned event or group of events. Note that the term “festival” can be changed to be something else – a grouping of SUBMISSIONS more appropriate to your organization. See *Submissions* on page 332

Files

Found in: COLLECTIONS, COMMUNICATIONS, COURSE REGISTRATIONS, DONATIONS, FORMS, MEMBERSHIPS, PLEDGES, REMINDERS, SALES, TICKETS, TOUR BOOKINGS

Files can be loaded into the Sumac database, then used by one or more templates.

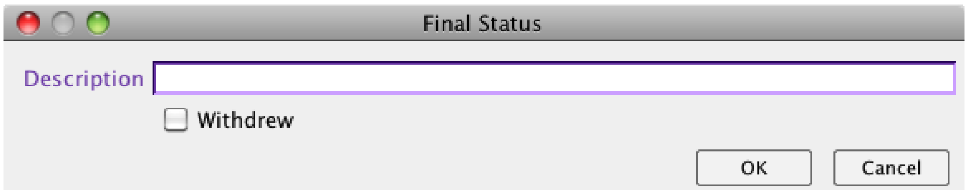
File Types

Found in: COLLECTIONS

When you enter a media attribute for a collection object, you must specify the type of file. For example: video, image, text.

Final Statuses

Found in: COURSE REGISTRATIONS



A course registration entry can have an initial status and a final status. Final status would typically be used to indicate that a student completed a course, dropped out, or failed.

If this status means that the student withdrew from the session, click the *Withdrew* checkbox.

Fiscal Years

Found in: FUNDER REQUESTS, TOUR BOOKINGS

Tour Booking programs can be associated with a fiscal year. The names of the fiscal years can be specified in this lookup list. They appear in the user interface as a drop-down menu.

Form Definitions

Found in: FORMS, AWARDING GRANTS

For more information, see *Forms* on page 217.

Funds

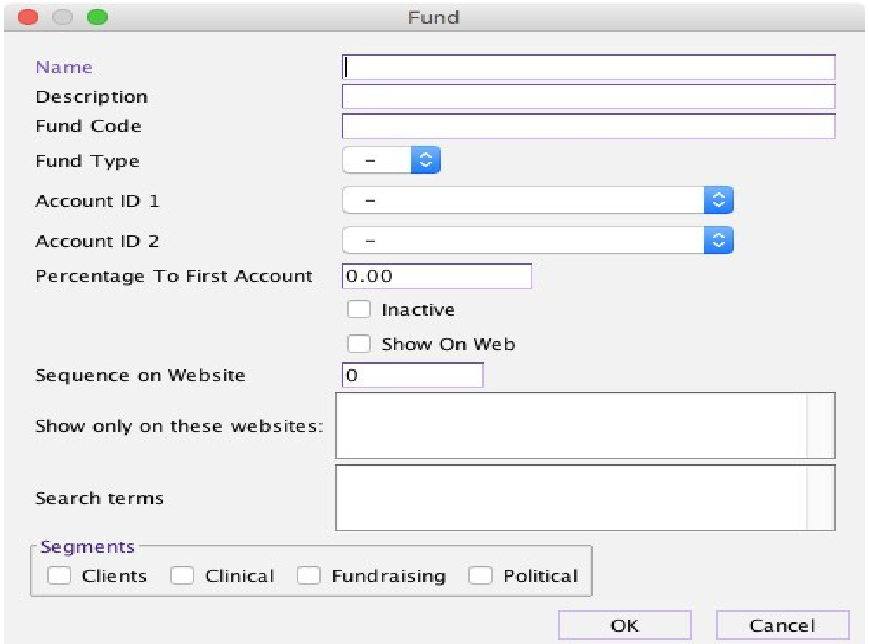
Found in: DONATIONS, PLEDGES

This list allows you to track the purpose for which each DONATION was made. You may choose to track the purposes of DONATIONS, if your organization:

- allows a donor to specify a purpose
- appropriately allocates the DONATIONS based on the donor-specified purpose, and
- internally accounts for DONATIONS by purpose.

Entering a Fund

The window for entering a fund looks like this:



First, enter a *Name* and *Description* for your fund. Be sure these are as clear and concise as possible. Continue to fill the remaining fields, using the below descriptions as a guide.

Fund Code

Some organizations use highly structured codes for their funds. You can specify these structured codes and search for donations based on parts of the coded fund identifier.

Fund Types

Fund types may help you group donations: you can search for donations by their fund type as well as their fund.

Donation Splitting

Sumac allows you to allocate a donation to a fund which is split between multiple accounts.

Specify the first and second accounts between which donations for this fund should be split. Also, specify the percentage of the donation that is supposed to go the first account; the balance goes to the second account.

If it should no longer be possible to use this fund for new donations, then click the *Inactive* checkbox.

If you are using Sumac to support donations or pledges through your website, and want donors to be able to direct their donations to this particular fund, then click *Display on web*.

Web Integration

If you accept donations on your website, you can choose to display this fund on your website by clicking *Display on website*. By default, funds are displayed on your website in alphabetical order. If you want a different order, enter a sequence number in the *Sequence on Website* field.

If you use Sumac to serve multiple websites from one database, you can restrict funds by website, so each website can show a different set of funds. This is done by the *Show only on these websites* field. In the field, you can enter the names of the websites that are supposed to show the fund. If you enter nothing, then the fund shows on all websites (if you have set *Display on website)*.

If you have a long list of funds and accept donations on your website, you may want to provide patrons with search terms to help them find the fund they are looking for. Enter search terms in the search terms field, separated by semicolons. For example, if you want a water project in Africa to be found by the terms *water* or *Africa*, enter:

```
water;Africa
```

into the *Search terms* field.

> Hint: You do not need to enter the name of the fund in the *Search terms* field because when a patron enters a search term, Sumac looks for it in both the *name* of the fund and the *Search terms* field.

Suggested Values

Awareness Program
Building Fund
Capital
Endowment Fund
General Operations
Outreach Program
Summer Camp Program Fund

Segments

The segments that appear at the bottom of your fund definition window relate directly to contact segments. When a fund is assigned to one or more segments, it will only appear to Sumac users who are able to see those segments. For example, if XYZ fund is designated to the *Fundraising* segment, then a user with permission to see only the *Clinical* segment will not be able to see, or search anything designated to the XYZ fund. For more on *Segments*, go to page 645.

Funder Types

Found in: DONATIONS, FUNDER REQUESTS

Each CONTACT can, optionally, be classed as a funder. The CONTACT record provides a drop-down menu for specifying which type of funder each CONTACT is. The values in this drop-down menu come from the Funder Type lookup list.

Suggested Values

Corporate
Government
Private Foundation

Funder Request Statuses

Found in: FUNDER REQUESTS

As a FUNDER REQUEST moves through various stages from initial contact to final report, you can keep track of its status. Specify the different statuses that you want to use in managing FUNDER REQUESTS.

Suggested Values

Approved
Submission Acknowledged
Submitted
Under Review

Funding Sources

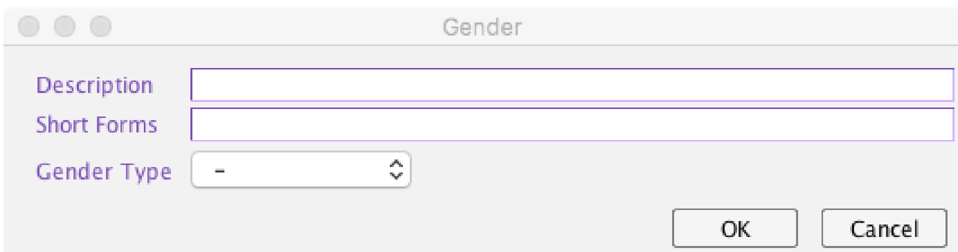
Found in: COURSE REGISTRATIONS

Each student registration in a session of a course may specify a different funding source. This enables you to keep track of whether a student is paying for the training, or whether it needs to be billed to an external funding body.

Gender

Found in: CONTACTS

Change the gender options in a CONTACTS record. Options recorded here display as a drop down in each individual contact record, and appear in the gender column in the contact list.



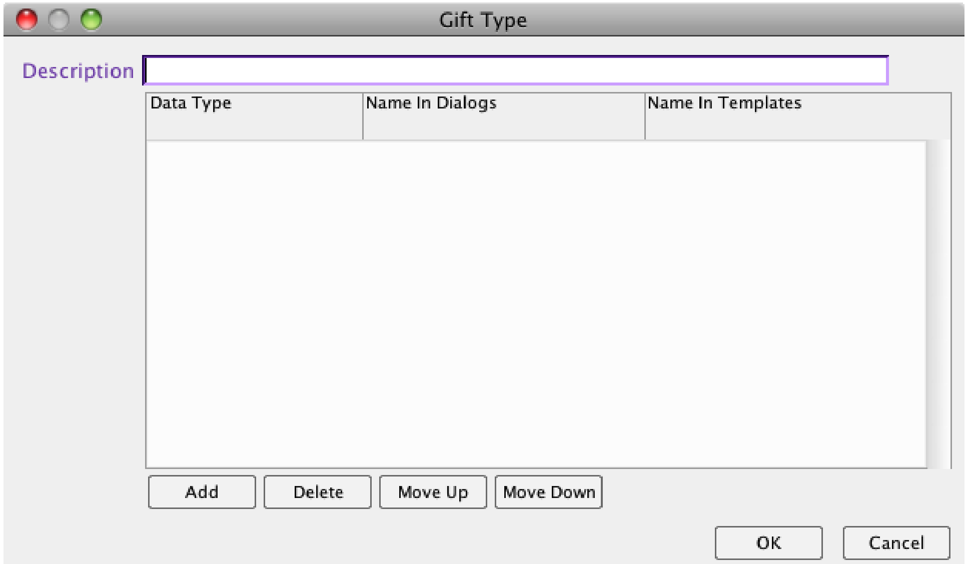
Description	Perhaps Male or Female, Trust or Partnership
Short Forms	Specify short forms that Sumac may encounter when importing genders (e.g. M, F).
Gender Type	Tell Sumac the nature of the contact that would have this gender. The choices are: Individual, Organization, and Household.

Gift Types

Found in: PROPOSALS

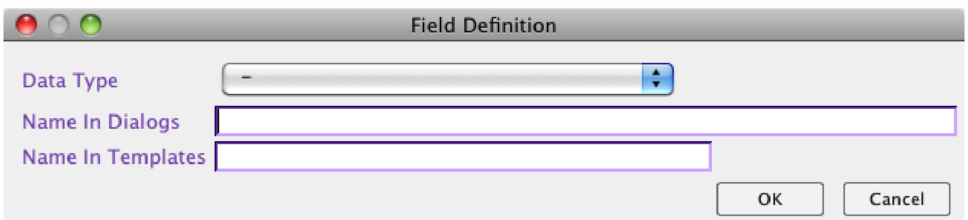
Each proposal indicates the type of the gift that a CONTACT is proposing to make. The gift types come from this lookup list.

In Sumac, a gift type contains a list of additional information needs to be gathered to describe a gift of that particular type. When you create a new gift type, this dialog appears:



Click Add to add a new piece of information to be gathered for a gift of this type. Click Delete to delete one. Click Move Up and Move Down to re-order the list to an appropriate order for a user to gather the information.

When you click Add, this dialog appears:

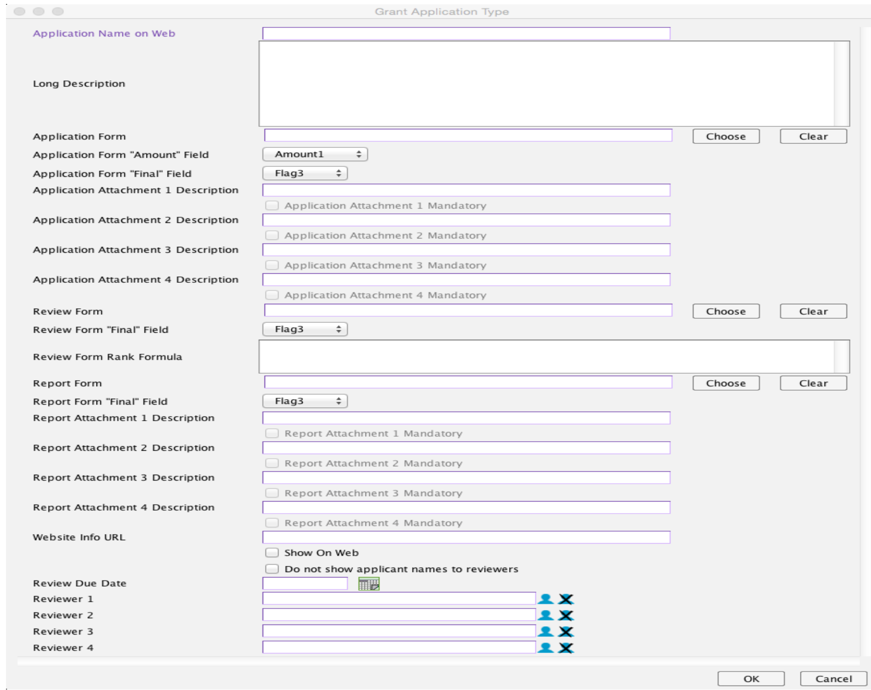


Choose the type of data being gathered, specify a prompt that can tell a user what needs to be entered, and specify a name to be used for this field when it appears in a template. Note that the name entered for use in a template should not start with *i_*, but when it is used in a template it must be prefixed by *i_*; e.g. if you enter a name of FairMarketValue, then in a template you must use i_FairMarketValue.

Grant Application Types

Found in: AWARDING GRANTS

Before anyone can create a grant application, you must define a type of application.



You need to create and specify the forms that will be used for applying, for reviewing the applications (if you intend to use Sumac for reviews), and if successful applicants should make a final report, then a form for final reports.

Each of the three types of forms must have a flag field that indicates, when checked, that the form is final. Use drop-down menus to pick the flag for each form. In addition, the application form should have an amount field that indicates how much money is being requested, which field can also be chosen from a drop-down menu.

If attachments are allowed, enter the names of the attachments that are expected. Note that you can have up to four attachments with an application, and up to four attachments with a final report.If required, an attachment can be marked as mandatory by checking the box below the field description.

The *Review Form Rank Formula* calculates a number based on fields in the review form. Whenever a review form is updated, the formula is evaluated and the calculated number is saved in the Grant Application record.

If this particular type of grant always has the same reviewer(s), then you can specify them. When the grant application record is created, the reviewers are automatically filled in. Note that this automatic filling takes place for grant applications entered manually, but not for those entered by a grantee on your website.

Group Types

Found in: CONTACTS

Groups can be organized by types. Typical types would include common searches used in the CONTACTS list, or exclusions used when creating CAMPAIGNS.

Note that once you have set up a group type that means exclusion, you should use the Preferences to tell Sumac which it is. This enables Sumac to present an appropriate list of groups when a user is setting up a new CAMPAIGN. Examples of exclusion groups include a group that finds deceased CONTACTS, or one that finds CONTACTS who have moved.

Grow-Your-Own Lookups

Found in: FORMS

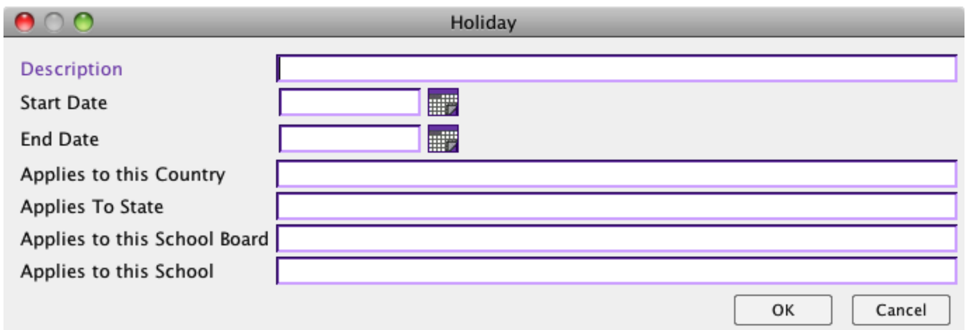
There are 28 lookup lists available for use in Grow-Your-Own objects. The meaning of these lists is defined by field definitions for the Grow-Your-Own objects. For further information, see *Grow-Your-Own* on page 225.

Note that if you use one of these entries, and then no longer need it, you can mark it as Inactive.

Holidays

Found in: REMINDERS, TOUR BOOKINGS, VOLUNTEERS

The Tour Booking module allows you to view workshops in a calendar view. In this view, holidays show up as a bar on the right hand side of a cell. Clicking the bar shows the holidays.

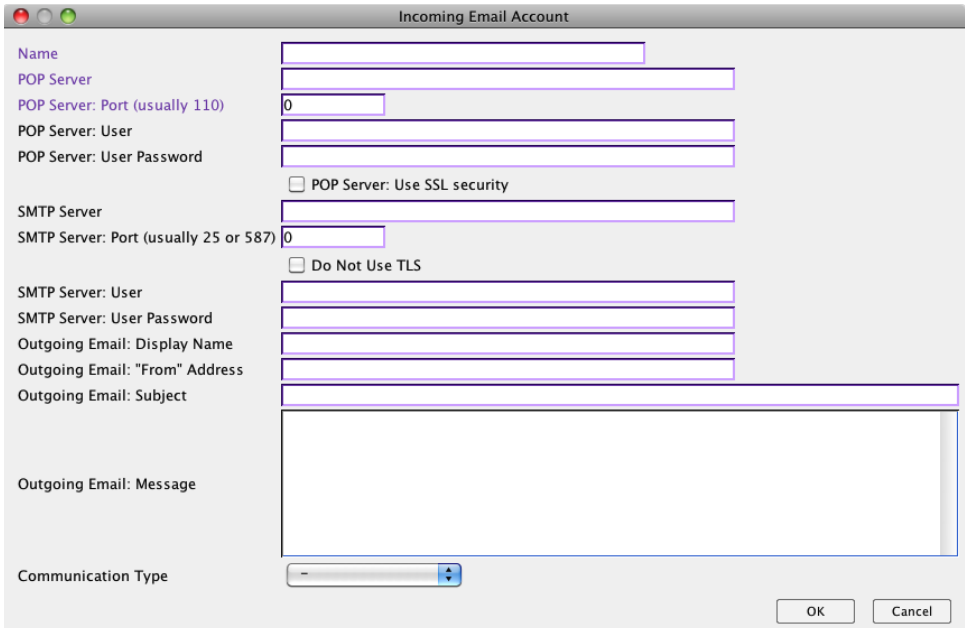


You must enter a description of the holiday. All other fields are optional, but the dates are necessary for Sumac to be able to display the holiday in the calendar.

Incoming Email Accounts

Found in: CONTACTS

You can configure Sumac to receive email sent to specific email addresses. Create and Incoming Email Account record for each email address:



Here are descriptions of the fields that define an Incoming Email Account:

Name	A brief name that identifies this incoming email account. Users will see this name in a drop-down menu for choosing which incoming email account to process.
POP Server	Use this group of fields to specify the POP server that Sumac should connect to to get the email, the user ID on that POP server, and whether to use SSL security.
SMPT Server	If a Sumac user who is receiving email should be able to send responses to the emails, then use this group of fields to specify the SMTP server for sending email, and the user ID on that SMTP server.
Outgoing Email	Use this group of fields to specify default values for information in responses sent to the incoming emails.
Communication Type	Often incoming mail is used to process requests to add or remove a contact from a mailing list. In Sumac, mailing lists are identified by communication types. If the purpose of this incoming email account is to add or remove contacts to or from a mailing list, then choose the corresponding communication type. This enables Sumac to automatically add and remove contacts from the appropriate list.

Industries

Found in: FACTS, JOB OPENINGS

Users can enter facts about CONTACTS. One type of fact is employment history. One of the fields in an employment history fact is the industry of the employment. The industries are chosen from this lookup list.

Initial Statuses

Found in: COURSE REGISTRATIONS

A course registration entry can have an initial status and a final status. Initial status can be used to indicate the student's status before taking the course: perhaps a special admission information, or funding source information.

Insurance Action Types

Found in: COLLECTIONS

When you specify an insurance action for a collection object, you can enter the type of insurance action. For example: initial valuation, renewal valuation, termination.

Job Opening Statuses

Found in: JOB OPENINGS

Each job opening has a job opening status indicator. This may indicate that the job opening is still available, or that it has been filled.

Languages

Found in: CONTACTS

This lookup list holds the languages that can be chosen from a drop-down menu. If each CONTACT has a specified language of choice, then you can customize document templates to communicate to each CONTACT in his or her language. This same list is used for specifying the alternate language (Language 2) for each CONTACT.

Suggested Values

English
French
German
Spanish

Ledger Entry Types

Found in: CONTACTS

When you manually enter a ledger entry, you can specify that it is a particular type.

Locations

Found in: COURSE REGISTRATION

You can specify the location of a class using this drop down menu.

Location Statuses

Found in: COLLECTIONS

When you specify a location for a collection object, you can enter the status of the location.

Location Types

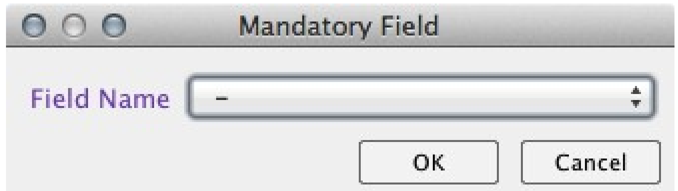
Found in: COLLECTIONS

This lookup list indicates the type of a location holding a collection object. For example: off-site storage, loan exhibit, permanent exhibit.

Mandatory Fields

Found in: CONTACTS

This list allows you to specify which fields are mandatory for the entry of a CONTACT.



> Hint: Last Name should always be mandatory. Postal Code and Phone Number are also sometimes chosen as Mandatory Fields. If you specify that Contact Types are mandatory, then Sumac requires a contact to have at least one contact type specified.

Marital Statuses

Found in: CONTACTS

You can record a contact's marital status in the Basic tab of a contact record.

Materials

Found in: COLLECTIONS

When specifying a physical property of a collection object, you use this lookup list to indicate the material it is made of.

Suggested Values

- canvas
- cotton
- granite
- marble
- paper
- silk
- steel
- wood
- wool

Measured Attributes

Found in: COLLECTIONS

When you enter a numeric attribute for a collection object, this list characterizes what is being measured.

Suggested Values

- density
- depth
- height
- opacity
- weight
- width

Medium

Found in: AUCTIONS

Your auction items use a particular medium, you can choose the medium of an auction item from this list of choices.

Media

Found in: SUBMISSIONS

SUBMISSIONS are often on a specific medium. This lookup list contains all the different types of media that your organization accepts.

Suggested Values

This list of values might be appropriate for a theatre company.

- Cabaret
- Class/Workshop
- Clown
- Dance
- Film/Video
- Installation, Performance
- Installation, Visual Art
- Music
- Other
- Performance
- Play, Long
- Play, Short

Membership Benefits

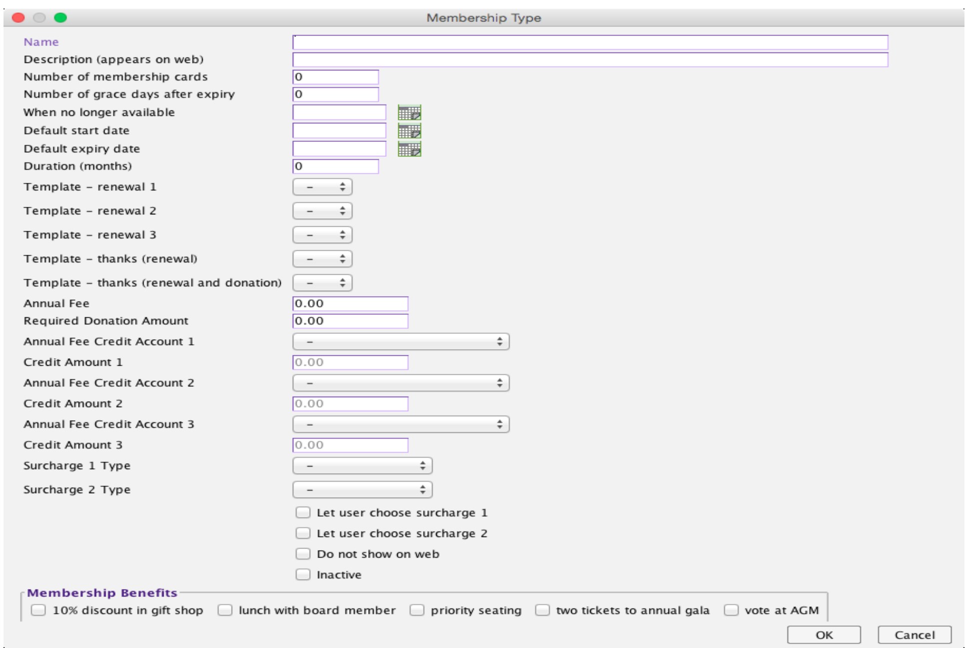
Found in: MEMBERSHIPS

These are the benefits that a MEMBERSHIP of a particular membership type receives.

Membership Types

Found in: MEMBERSHIPS

Each MEMBERSHIP must be of a particular membership type. The membership type indicates the cost and the benefits associated with different levels or classes of MEMBERSHIPS.



You are able to set the number of cards that come with each membership type. For example, for a family membership, you can specify that 4 cards are issued and for an individual membership, only one card is printed.

You can pre-set a default expiry date for each type of membership. If a certain class of membership always expires on the same date, then this saves having to enter the expiry date into every membership record of that type.

Sumac assumes that a membership is one year in duration. But if that particular type of membership is a different duration, then you can specify its duration in months.

If there are standard templates that you use for renewal and thank you messages, you can specify these templates.

Note that you can specify a mandatory donation in addition to the fee for the membership. You can also specify up to three default credit fee accounts.

A membership can have up to two surcharges. You can choose the applicable surcharges from drop-down menus. Alternatively, if you want users to be able to specify which surcharge(s) apply, click one or both of the *Let user choose surcharge* check boxes.

Membership types can specify an account code. If specified, then the membership fees for memberships of that type are credited to that account.

You can also indicate that a particular membership type should *not* be displayed for renewals occurring through your website.

Suggested Values

Adult
Organization
Senior
Student

Object Relations

Found in: COLLECTIONS

When specifying the relationship between two collection objects, this drop-down menu indicates the type of relationship that one object has to another.

Suggested Values

components
sequential drafts

Pay Timeframes

Found in: JOB OPENINGS

When specifying the rate of pay for a job opening, you should also specify a pay timeframe. These typically indicate that the rate of pay is hourly, weekly, monthly, or per year.

Payment Batch Specifications

Found in: PAYMENTS

If you export payments into bank-specific file formats, usually for processing a batch of payments, then you need to specify additional information used in the file format. The information you specify is specific to the bank being used.

Create a Payment Batch Specification record for each of your bank accounts for which you process transactions.

Here are bank-specific formatting instructions:

Canadian Imperial Bank of Commerce (CIBC)

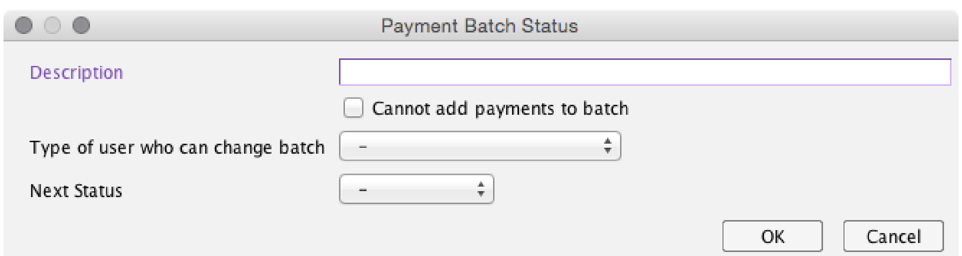
Field	*Maximum Number of Characters*	*Description*
Creation Number	4	start this at the next batch number to use; Sumac will automatically increment it each time you generate a batch

Field	*Maximum Number of Characters*	*Description*
Data Centre	5	number assigned by the bank to your organization
Originator Number	10	number assigned by the bank to your organization
Originator Short Name	15	short version of your organization name.
Sundry Information	10	appears on customer account statement
Institution Number	4	must be *0010* for CIBC
Branch Transit Number	5	transit number of the account into which to put funds
Account Number	12	account into which to put funds
Currency Indicator	3	*CAD* or *USD*
Transaction Code	3	Refer to CIBC's *EFT Reference Guide Appendix* for a complete listing of CPA Transaction Codes

Payment Batch Statuses

Found in: PAYMENTS

Each Payment Batch can have a status:



Give the status a description, that will appear in drop-down menus.

If you want to restrict which users are allowed to change a payment batch, choose from the *Type of user who can change batch* drop-down menu which types of users are allowed to change a payment batch with this status.

If payment batches with this status must only be changed to another specific status, then choose the status that must follow this one from the Next Status drop-down menu.

Payment Machines

Found in: PAYMENTS

A Payment Machine is a physical piece of equipment which handles payment transactions requested by Sumac, then tells Sumac whether the transaction succeeded or not.

Field	*Description*
Payment Machine Type	At present, only the Moneris iCT250 is supported. See *Payment Machine: Moneris iCT250* on page 291.
Name	The name used in drop-down menus when a user chooses which payment machine to use.
IP Address	The IP address of the payment machine on your internal network. Sumac communicates with the payment machine using this IP address and the port.
Port	The port number on which Sumac should communicate with the payment machine.
Default Payment Type	If a payment transaction is returned by the payment machine with a payment type that Sumac does not recognize, then this payment type is used. Sumac determines the type of a payment by comparing what the payment machine returns with the Payment Processor Code field in its list of Payment Types. For more details, see *Payment Types* on page 632.

Payment Purposes

Found in: PAYMENTS

Each payment record can have a purpose. These record why your organization received the payment. For example, you may receive a payment for a ticket order, for a sale, or for attendance at a seminar.

Payment Statuses

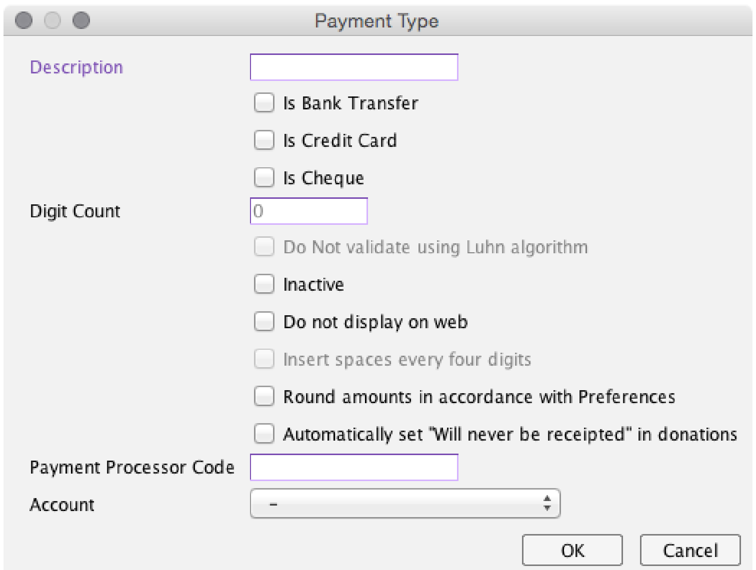
Found in: TOUR BOOKINGS

You can specify the payment status of a Tour Booking program. These appear as a lookup list in the Billing tab for the program. Appropriate payment status entries might include billed, paid, and overdue.

Payment Types

Found in: DONATIONS, MEMBERSHIPS, PAYMENTS, PLEDGES, SALES, TICKETS

Donations are received using different payment methods. Each donation must be of a specific payment type. Pledges create donation records, so pledges also use the same payment type list to indicate the payment type of donations. You also specify a payment type for each payment record associated with a donation or ticket order.



Here is what each field in a payment type means:

Field	*Usage*
Description	This is the name that appears in the drop-down list of payment types
Is Bank Transfer	Click to indicate that this payment type is a bank transfer. Sumac gathers additional bank-related information about these payments.
Is Credit Card	Click to indicate that this payment type is a credit card. Sumac gathers additional credit card details about these payments. Also, the subsequent fields apply only to credit cards.
Digit Count	How many digits are in this credit card (MasterCard and Visa are 16, American Express is 15).
Do Not validate using Luhn algorithm	Most credit card numbers are verified regarding length and check digits. Normally you should *not* choose this check box. Choosing it disables certain validations performed on credit card numbers.
Inactive	An inactive payment type cannot be used when creating new records.
Do not display on web	If a payment method is available to Sumac users but cannot be entered on a website, click this check box.
Insert spaces every four digits	Click to insert spaces when showing credit card numbers.

Field	*Usage*
Round amounts in accordance with Preferences	If you use penny rounding, click this checkbox to apply penny-rounding to payments of this type. This usually just applies to cash payments. For more information see *Penny Rounding* on page 279.
Automatically set "Will never be receipted" in donations	If a payment type, when specified for a donation, means the donation should not be receipted, click this check box. This is often used when a payment type indicates that a donation was recorded in an external system.
Payment Processor Code	If you connect Sumac to a payment processor, this code is required by the payment processor to identify each type of credit card. If you are using iATS as your payment processor, then the codes are as follows: American Express AMX Diners Club DC MasterCard MC Visa VISA If you are using an iCT250 payment machine, then the codes are as follows: American Express AMEX Discover DISCOVER Interac Debit INTERAC Interac Flash FLASH JCB JCB MasterCard MASTERCARD Visa VISA

Suggested Values

American Express
Bank Transfer
Cash
Cheque
Debit
Diners Club
MasterCard
Money Order
VISA

If your organization uses Sumac Memberships, you may want a Payment Type to indicate a payment was received as part of a membership renewal:
Membership Renewal

Personnel Informed Statuses

Found in: TOUR BOOKINGS
In the Tour Booking module, you can specify personnel to deliver a workshop. You can record whether each person is confirmed for a role. Possible values for this lookup list: confirmed, proposed, accepted, notified, declined.

Personnel Roles

Found in: TOUR BOOKINGS

In the Tour Booking module, you can specify personnel to deliver a workshop. You can specify the role each person is to assume with respect to the workshop. Possible values might include: primary presenter, support, volunteer.

Pledge Statuses

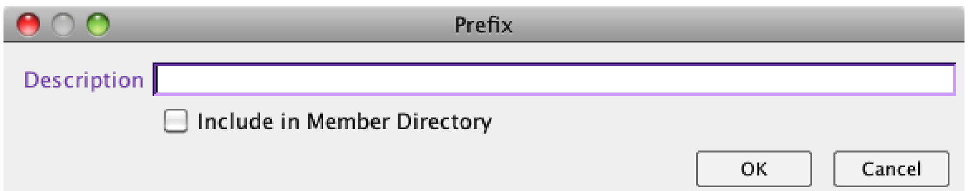
Found in: PLEDGES

You can specify the status of each pledge, for example:complete, or in progress.

Prefixes

Found in: CONTACTS

When a user enters CONTACT information, one of the fields for each CONTACT is a prefix, or title. You can standardize on prefixes, and speed up their entry, by putting them into this lookup list.



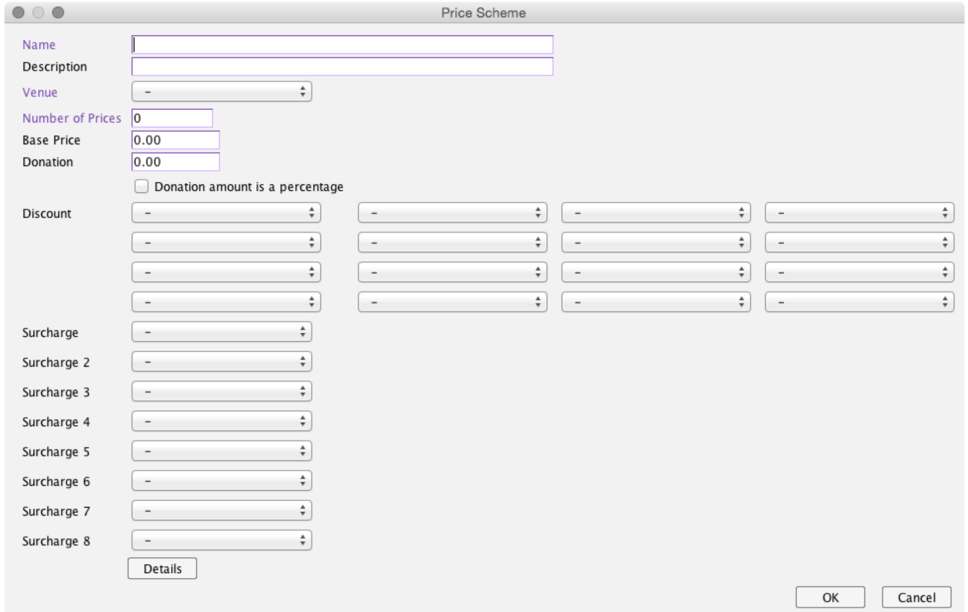
If you have licensed Sumac Membership, then there is also a check box in the dialog. This check box indicates whether this prefix should appear in front of CONTACT's names when they are put in an automatically generated membership directory. This enables you to include some prefixes (e.g. Dr or Sir) while excluding others (e.g. Mr or Mrs).

Price Schemes

Found in: TICKETS

A pricing scheme specifies the price of each seat in a particular venue. There may be several price schemes for a single venue. You may have different pricing for Friday night performances than for Sunday matinées. You may have different pricing for one performance than for another.

The dialog for creating a new price scheme looks like this:



Choose the Venue from the drop-down list of venues. Specify a Name and Description for the price scheme.

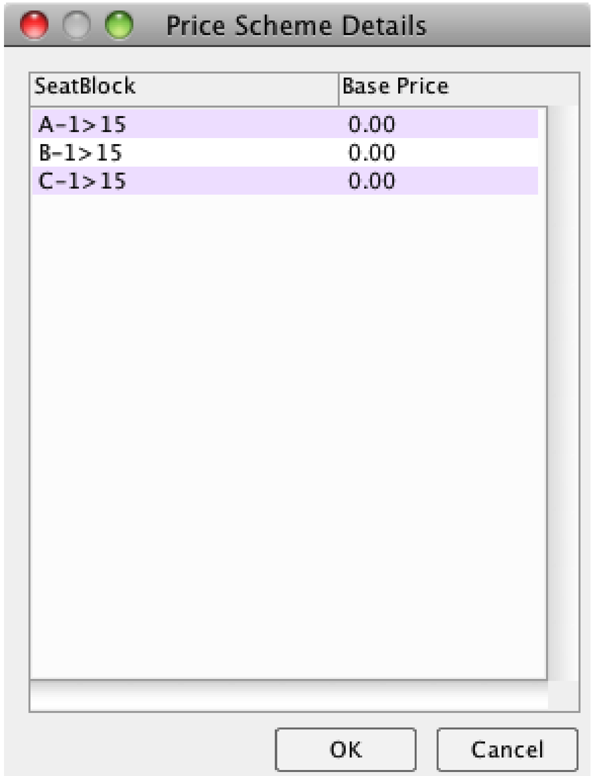
Then indicate the Number of Prices. This will always be at least 1, and you enter the primary price in the Base Price field. Note that the Base Price can be zero, if this price scheme is for an event for which no admission fee is being charged.

If there is a mandatory donation associated with each ticket, then specify the amount of the donation. You can specify either a currency amount (e.g. 5.00) or a percentage; if the amount you enter is a percentage, click the *Donation amount is a percentage* check box.

If you have discounted ticket prices, then choose the discounts that are available from the Ticket Discount drop-down menus.

If there are standard surcharges that may be charged on each order of tickets, then choose them as well.

If you want finer control over the pricing of seats, click the Details button. This presents you with a dialog like this:



The above dialog enables you to manually edit the price (base price and, if any were specified, discounted prices) for each seat block in the venue.

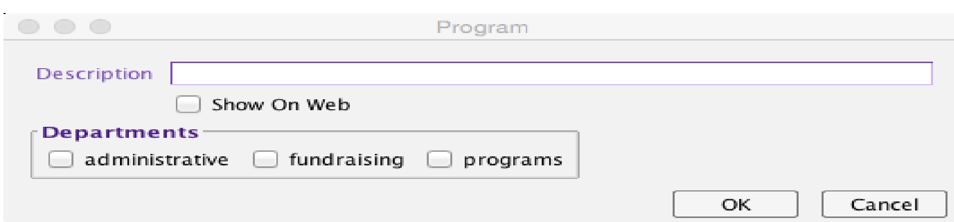
Product Type A and B

Found in: PRODUCTS

Product types are used to classify what type of product you are entering. These fields are disabled by default, but can be enabled in Customize Database/Field Preferences/Products.

Programs

Found in: FACTS, TIME DOCKETS, VOLUNTEERS



Your organization may operate different programs for its clients. CONTACT records can hold information about each CONTACT's interests. The program interests are chosen from this lookup list of programs.

If you use Sumac Volunteers, then each TASK and TIME DOCKET can be associated with a program. This can be used in conjunction with Departments, to provide more accurate classification of tasks. Note that a program can be restricted to only appear with specific department selections.

If you are defining a program that is only applicable to a particular department, then choose that department from the drop-down menu. Then, when a user is entering a task and has specified a department, the list of available programs is shortened to show only those that are available for the particular department.

The Show On Web flag determines if a program should be displayed in the Volunteer Sign-up page on your website.

Program Themes

Found in: TOUR BOOKINGS

Tour Booking programs can be associated with a particular theme, chosen from a drop-down list.

Provenance Types

Found in: COLLECTIONS

When specifying provenance information for a collection object, this lookup list indicates the type of provenance information. For example: created, ownership change.

Provinces

See *State (Province)* on page 648.

Public Presentation Types

Found in: TOUR BOOKINGS

Some Tour Booking workshops are public presentations – perhaps a final presentation of a work that was developed in a series of preceding workshops. You can specify the type of public presentation using this lookup list.

Recognition Types

Found in: FACTS

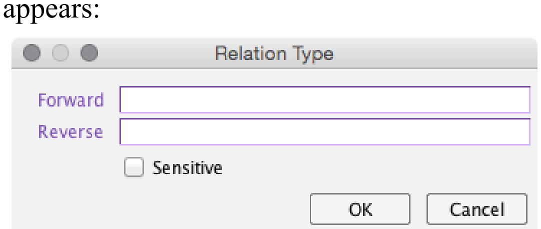
Contact records hold facts about each contact. One type of fact is a Recognition fact, which records ways in which the contact has been recognized, usually for volunteer service to the organization. Each recognition fact contains a drop-down menu that lets you specify what type of recognition a contact has received.

Relation Types

Found in: CONTACTS

Sumac allows you to relate one CONTACT to any number of other CONTACTS. The relations may be business, e.g. an individual CONTACT is a member of the board of an organization CONTACT. The relations may be personal, e.g. a CONTACT is the spouse or parent of another individual CONTACT.

This lookup list lets you specify the types of relations that you wish to record in your Sumac database. When you click the New button in the list of relation types, this dialog appears:



When you create a new relation type, you must provide descriptive text for the relationship in both directions – forward and reverse. For example, if A is a parent of B (the forward relation), then B is a child of A (the reverse relation). If you are editing information about a CONTACT A, and indicate that CONTACT A is related to CONTACT B in a certain way, then Sumac will know that CONTACT B has the reverse relationship with CONTACT A. This means that you only need to specify the relationship once, and Sumac knows it applies to both CONTACTS (though in the opposite way).

Some relation types (e.g. *friend of*) may be the same in both directions. In this case, enter the same text in both the Forward and Reverse fields.

If a relation type is marked as *Sensitive*, then only users who are allowed to see sensitive information will see that type of relation.

Suggested Values

board member of – has director	friend of
consults to – has consultant	member of – has member
contact of – contacted by	parent of – child of
works with	spouse of
employs – works for	

Rooms

Found in: COLLECTIONS

A location attribute for a collection object can indicate a room.

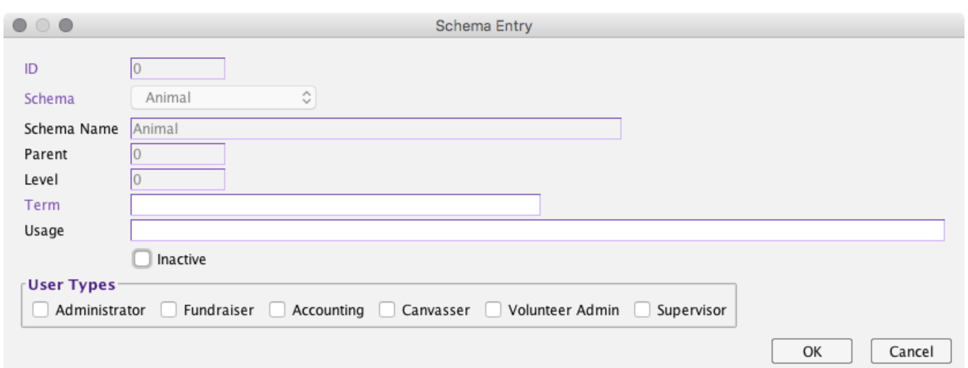
Schemas

Found in: COLLECTIONS, CONTACTS, GROW-YOUR-OWN

When you create a collection object, it can be classified using a classification scheme called schema. A schema can have up to six levels of description. When you define a schema, you can name the six levels.

Schema Entries

You can access the schema entries list by clicking the *Schema Entries* button in the Schema definition window. You can also use the Utilities/Customize Database/Schema Entries command to add entries to a schema.



If you click to select user types, then only users with those types are allowed to see this particular schema entry.

A schema entry can be marked inactive, so that users can no longer choose it.

Hint: Schema entries can be used in Grow-Your-Own (GYO) records. If a schema entry that is used in a particular GYO record is not visible to a user then that user is not allowed to view the GYO record.

Schools

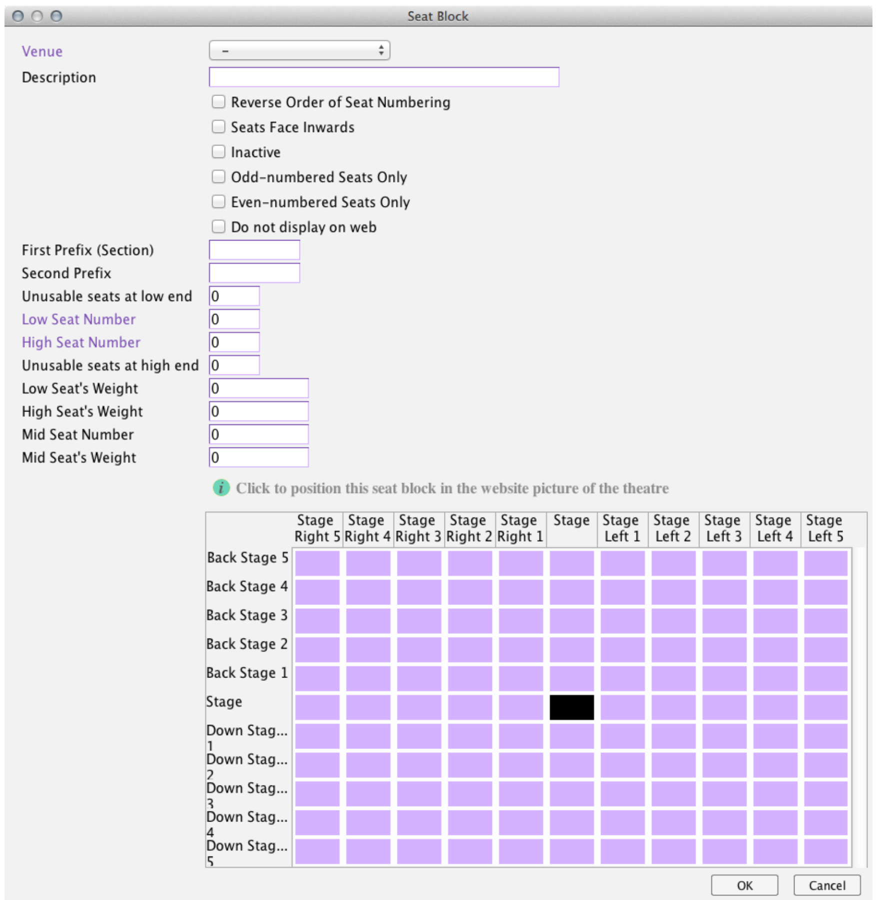
Found in: FACTS

You can specify Education Facts for CONTACTS. This lookup list indicates the list of schools you wish to record.

Seat Blocks

Found in: TICKETS

A seat block is a group of seats that are in a venue, typically all having the same ticket price. All the seat blocks that are related to a venue together constitute a seating plan.



Checkboxes

At the top of the window for defining a seat block, there are several checkboxes. Here is what they mean:

Reverse Order of Seat Numbering	Seats are normally presented ascending, from lowest to highest seat numbers, left to right. This check box reverses this presentation.
Seats Face Inwards	If the seat block is being presented on your website, this causes the row of seats to be presented vertically (up a side) rather than horizontally.
Inactive	This checkbox causes the seat block to be displayed dimmed, and sorted to the end of the list of seat blocks.
Odd-numbered Seats Only	This tells Sumac that only odd numbers, between the low and high seat numbers, are to be used.
Even-numbered Seats Only	This tells Sumac that only even numbers, between the low and high seat numbers, are to be used.
Do not display on web	When seats are being sold on your website, do not offer this block of seats for sale.

Seat Identification

First, choose from the drop-down menu the venue that contains this seat block.

Then indicate the First Prefix and Second Prefix for seats in the block. Prefixes are used to form seat identifiers. Usually you need one (typically a row identifier like A, B, C, etc.). Occasionally you may need two, for example if there is a row A in the pit and also a row A in the balcony, then the first prefix could indicate pit or balcony, and the second could indicate the row.

Next identify the Low Seat Number and High Seat Number in the block. Seat numbers are normally greater than zero, but you are allowed to use a Low Seat Number of zero.

Unusable Seats

Sometimes a venue has uneven rows: seats missing at the end of some rows, extras added on to some rows, etc. If you are using Sumac to generate a seating plan on your website, you can show seating alignment more accurately if you specify that there are unusable or non-orderable seats on either end of a seat block.

Specify how many unusable seats are at the low-numbered and the high-numbered end of the seat block. These seating positions appear white on your website.

Seat Weights

When you specify weights for seats, you are indicating how good a seat is. This enables Sumac to identify which seats are better than others.

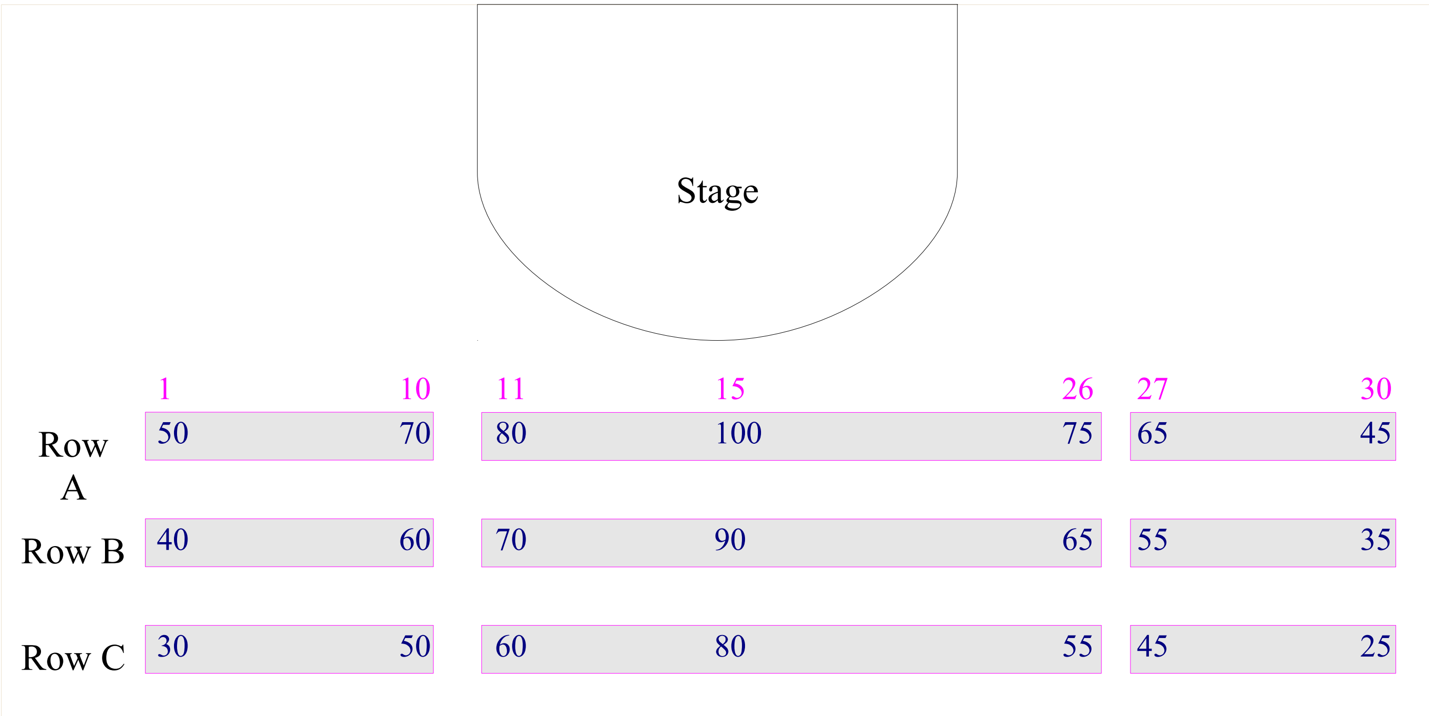
The best seats in the house should have a weight of 100, and all other seats have lower weights.

The seats in a block can be given weights by indicating the weight of the seats on each end of the block. Then Sumac fills in the seats in-between.

If the block is off-centre or for some reason seat weights are not continuous from one end of the block to the other, an additional weight can be specified for a seat in the middle. In this situation you would specify the Mid Seat Number (which seat it is), and its weight – the Mid Seat's Weight.

Consider this example:

Assume your theatre has the following seating plan: three rows of 30 seats, numbered from the left, two aisles. There are nine seat blocks. The best seat is seat 15 which is in the middle of each row.



You would start assigning weights by deciding on the weights to be given to the end seats in each block and, if necessary, by a seat mid-way through some blocks. The weights appear inside the blocks in the picture above.

Then enter information for each block. To specify the stage right block in Row B, enter the following:

To specify the middle block in the first row, do this:

Online Ticketing Considerations

If these seat blocks are going to be displayed online, so that patrons can purchase tickets from your website, you need to specify additional information so that Sumac can draw an appropriate seating plan:

- Reverse Order of Seat Numbering: If Sumac is numbering left to right and numbers should run right to left, click this check box to reverse the numbers.
- Seats Face Inwards: A block of seats will usually be presented horizontally. But if the seat block is rotated (perhaps the seats are balconies on the side of the venue), click this check box to present the seats vertically.
- Seat block positioning: You must specify the position of the seats relative to the stage. Click rectangles in the venue layout picture to indicate where a seat block is. Note that several seat blocks may be in the same position (e.g. directly in front of the stage). Also note that a seat block may be specified as occupying several adjacent positions. For example, a long block of seats positioned in front of the stage with no aisles could be positioned like this:

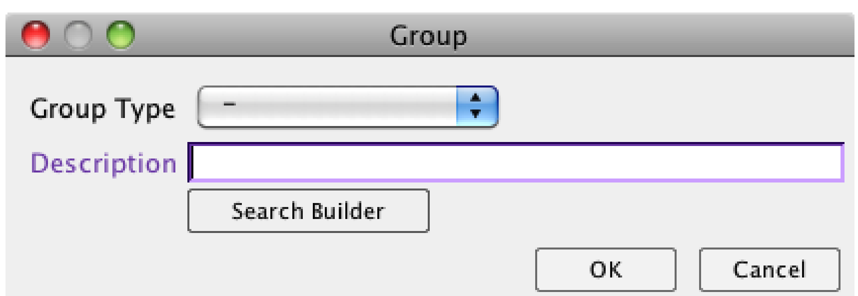
Search Builder Groups

Found in: COMMUNICATIONS

A group is a set of search criteria pre-built (by the Sumac Administrator), the same as those generated by Search Builder. There are two main uses for groups:

- CONTACTS who are going to receive (or not receive) information in a particular CAMPAIGN can be identified using a group.
- Groups can also be used to perform searches in the CONTACTS list.

When you create a new Group, this dialog is presented:



Choose the type of group (see *Group Type* below), and give the group a name or brief description. Then click the Search Builder button to define the search that is to be performed in order to find the CONTACTS who are members of this group.

Here are suggested steps for creating a Group:

- ✔ Open the CONTACTS list, and click its Search Builder button.
- ✔ Develop the search criteria, testing them as you go using the Show Contacts button.
- ✔ Note that you can save intermediate working versions of the Search Builder search to files.
- ✔ When you are sure that the criteria you have specified do the desired search, click the Save As Group button to create a new group in the database, making it available to all users.

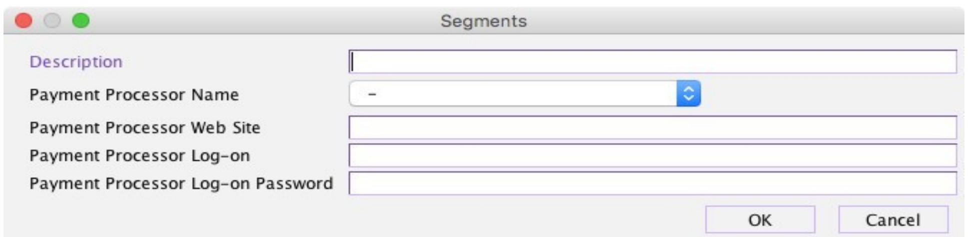
Seasons

Found in: COMMUNICATIONS, TICKETS

Seasons are used when defining Event Groups. Seasons can also be used when defining Ticket packages.

Segments

Found in: CONTACTS



You may wish to segment certain information in your Sumac database, and give each user the ability to see records in only certain segments. This list is where you specify the segments that exist.

> Hint: Once you have defined some segments, each user's profile can indicate which segments of contacts the user is allowed to see.

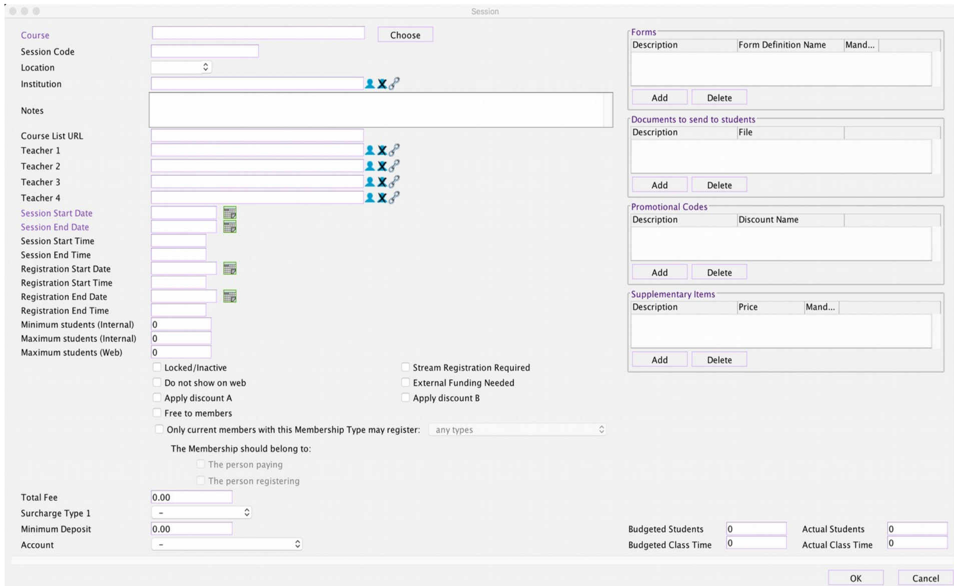
You can also specify a payment processor merchant account for a segment. When you do this, if Sumac needs to process a credit card, it chooses the merchant account applicable to the segment that the payer is in. If you do not specify a payment processor for a particular segment, and a payment from a contact in that segment is being processed, then Sumac uses the default payment processor specified in the Preferences dialog.

Once you create your segments, they can be applied to the following:

- Contacts
- Departments
- Extra Fields
- Offices

Sessions

Found in: COURSE REGISTRATIONS



Courses can have several sessions. For example, if a course is taught in a facility that allows only 10 students at once, you may have three sessions of the course running in parallel to train up to 30 students.

When a session is marked as locked or inactive, it no longer appears when a user choose a session. The list of available courses and session shows only unlocked sessions.

Fields

Here are explanations of some of the fields in a session record:

Field	*Description*
Institution	If you hold courses at different institutions, you can link an institution (contact) to a course session.
Course List URL	This is the URL of some HTML text that will appear on your website when a student clicks to get more details about a particular session.
Account	Registrations in this session will have their account set to this. They will be ledgerized using this account.
Do not display on web	If this check box is set, then this session is not displayed in Course History on your website. It is also not displayed in Account Transactions if the total fee charged was zero.
Only Current Member...	If you wish to restrict registrations to current members, perhaps with a particular type of membership, click

Forms

If your installation of Sumac supports Forms, then you can specify the forms that need to be filled in for a person registering for this session.

Documents To Send

If there are standard documents that should be sent to a student, then you can list them here.

Promotional Codes

If this session allows promotional pricing, then you can specify the applicable discount code. The promotional code is a discount combined with an expiry date, after which the particular discount is no longer available.

> Hint: Promotional codes are not yet allowed in website course registration, only in orders entered directly into Sumac.

Supplementary Items or Child Sessions

The list in the bottom right corner is either a list of supplementary items (if the course is a regular session) or a list of child sessions (if the course is a stream).

Supplementary Items

Some sessions require a student to buy extra things: perhaps materials or safety equipment or clothing. These items can be listed with the session.

The details of the supplementary item are specified as a Product (see *Product* on page 304).

Child Sessions

You can specify the sessions that are part of a stream session, and also special pricing for those child sessions.

Set/Group Types

Found in: COLLECTIONS
This list characterizes collection objects that consist of multiple pieces.

Suggested Values

Pair
Set
Set (Incomplete)

Shipping Methods

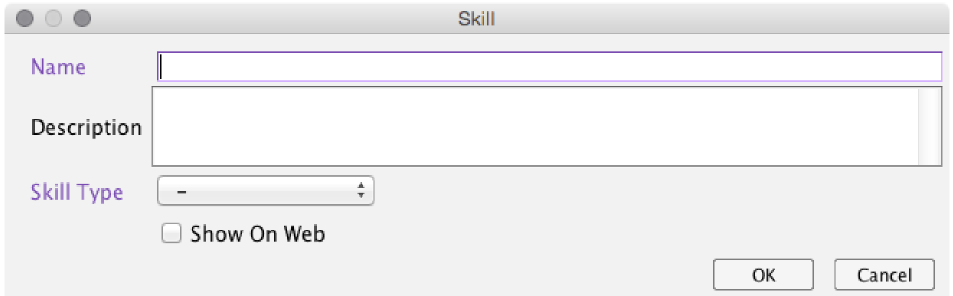
Found in: COLLECTIONS
When specifying the location of a collection object, you use this lookup list to indicate the shipping method that takes the object to its location.

Skills

Found in: FACTS, JOB OPENINGS, SKILLS
Sumac Volunteers allows you to specify:

- that certain skills are needed to perform a particular TASK
- facts that indicate that volunteer CONTACTS have certain skills which were verified at a particular time.

In both cases, the skills are chosen from this lookup list.



If you indicate that a skill can show on a website, then it appears when tasks are added and displayed in the web-based volunteer management module.

Skill Types

Found in: facts, job openings, volunteers

Each skill in the skill lookup list must be of a particular type. This lookup list specifies the available types. When a user chooses a skill, the list of skills is organized as a hierarchy with skill type as the top level, and under each skill type is a list of skills.

Suggested Values

Administrative
Client Service
Event Management
Grounds Maintenance

Sources

Found in: communications, tickets

The source is used for marketing purposes to record in each ticket order how the ticket buyer found out about the event or organization.

This same source list is used to record the source of a communication, particularly useful if the communication records attendance at an event.

Note that there is a separate list of source codes used to record the source of a contact. See *Contact Source* on page 605.

Suggested Values

Advertising
Direct Mail
Word of Mouth

States (Provinces)

Found in: contacts

States (provinces, counties, parishes) can be entered more quickly into contacts' addresses if they can be chosen from a lookup list. The list can also standardize spelling and abbreviations.

Statuses (for Reminders)

Found in: reminders

This lookup list is used to specify the possible statuses of a reminder.

Statuses (for Submissions)

Found in: submissions

This lookup list is used to specify the possible statuses of a submission.

Suggested Values

Accepted
Received
Rejected
Under Review

Subsidiary Communication Types

Found in: SUBSIDIARIES
Communication types in this lookup list are used to create a list of communication types in each subsidiary database.

Subsidiary Contact Types

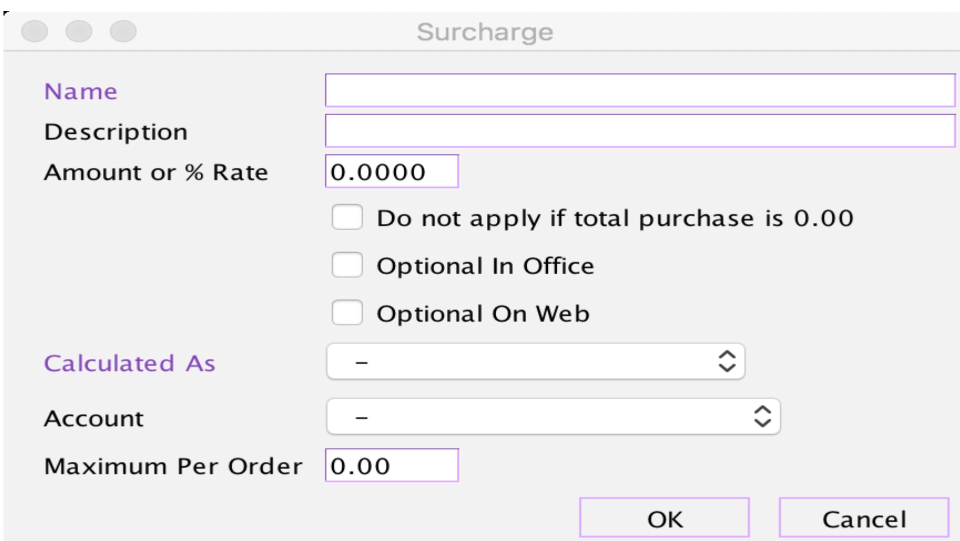
Found in: SUBSIDIARIES
Contact types in this lookup list are used to create a list of contact types in each subsidiary database.

Subsidiary Organization Types

Found in: SUBSIDIARIES
Subsidiaries can be categorized by organization types. The organization types are chosen from this lookup list.

Surcharges (Taxes)

Found in: COURSE REGISTRATIONS, INVOICES, MEMBERSHIPS, SALES, TICKETS, SURCHARGES
A surcharge is an extra charge (tax) added to a TICKET ORDER or a SALE. Here is the window for entering a surcharge:



Enter the name (e.g. RST) and description (e.g. retail sales tax) of the surcharge. If the surcharge is calculated as a percentage then enter the percentage, if it is a fixed amount then enter the fixed amount.

Set the first check box to tell Sumac not to apply this surcharge if the order total is 0.00. Next, indicate if the surcharge is optional. One that is optional (e.g. expedited shipping charge) can be added to an order manually. A surcharge that is not optional is added automatically to an order. Note that you can indicate if the surcharge is optional for orders placed using Sumac directly (in your office) and separately specify whether the surcharge is optional for order placed through your website.

Indicate how the tax is calculated. If you have licensed Sumac Ticketing, there are three choices:

- Fixed Amount Per Order: the amount is a fixed currency amount that is added to each order.
- Fixed Amount Per Ticket: the amount is a fixed currency amount that is added to each ticket.
- Percentage: the charge added to the order will be calculated as the specified amount multiplied by the value of the tickets in the order.

If you have *not* licensed Sumac Ticketing, there are two choices:

- Fixed Amount: the amount is a fixed currency amount that is added to each payment.
- Percentage: the charge added to the order will be calculated as the specified value multiplied by the value of the payment.

If the surcharge should be allocated to a particular account, choose that account from the drop-down menu.

You may want to specify a limit on the surcharge for each order. For example, you may apply a handling charge of $3.50 per ticket, to a maximum of $10.00. Specify that limit in the *Maximum Per Order* field.

Suggested Values

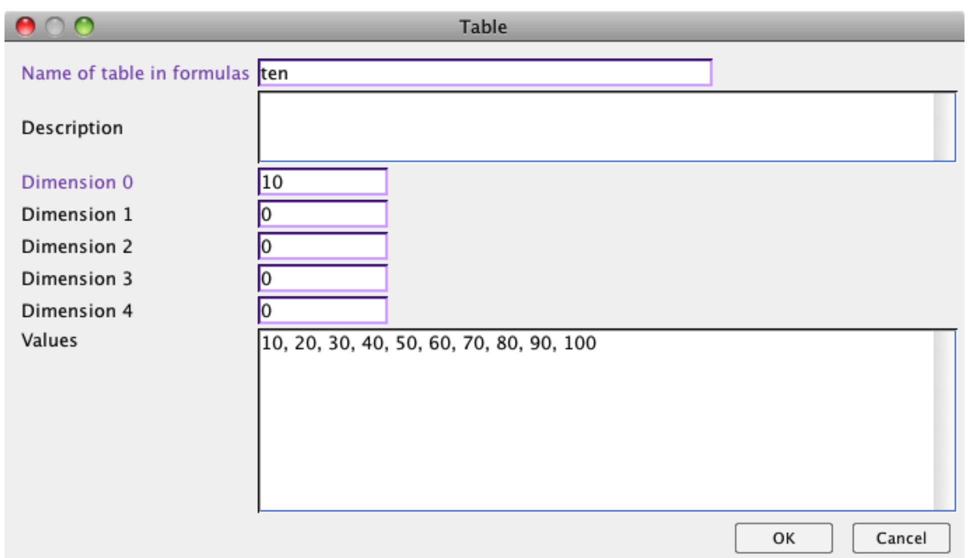
Courier
Sales Tax
Shipping
Value Added Tax

Tables

Found in: PROPOSALS

Tables enable the more sophisticated calculations sometimes required to make planned gift proposals.

When you enter a new table, you must specify its dimensions and the values of the entries in the table. Here is a one-dimensional table with ten entries:



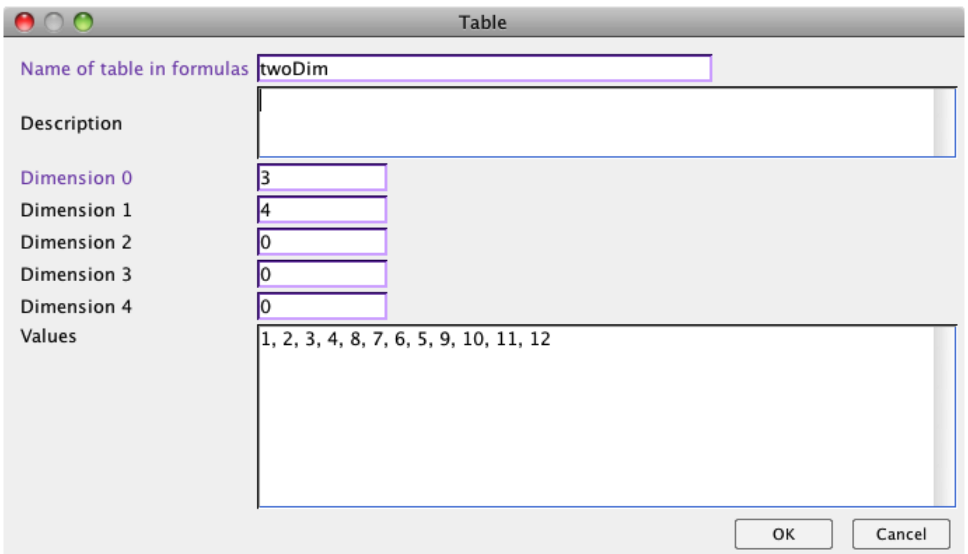
Notice that its first and only dimension is 10. The entries are specified in order (recall that subscripts used for entries in table start at zero):

```
ten[0]10
ten[1]20
ten[2]30
ten[3]40
ten[4]50
ten[5]60
ten[6]70
ten[7]80
ten[8]90
ten[9]100
```

Here is a two-dimensional table with three rows and four columns:

```
1      2      3      4
8      7      6      5
9      10     11     12
```

It would be put into Sumac as follows:



Notice that the entries are put into the Values field in the order the makes the last subscript vary fastest:

```
twoDim[0,0]      1
twoDim[0,1]      2
twoDim[0,2]      3
twoDim[0,3]      4
twoDim[1,0]      8
twoDim[1,1]      7
twoDim[1,2]      6
twoDim[1,3]      5
twoDim[2,0]      9
twoDim[2,1]      10
twoDim[2,2]      11
twoDim[2,3]      12
```

If you have a three dimensional table, the Values field would be filled similarly, with entries put in the order that makes their last dimensions vary fastest:

```
xxx[0,0,0]
xxx[0,0,1]
xxx[0,0,2]
  …
```

```
xxx[0,1,0]
xxx[0,1,1]
xxx[0,1,2]
   …
xxx[0,2,0]
xxx[0,2,1]
xxx[0,2,2]
   …
xxx[1,0,0]
xxx[1,0,1]
xxx[1,0,2]
```

Hint: The number of entries in the Values field must be equal to the product of all the dimensions that you specify.

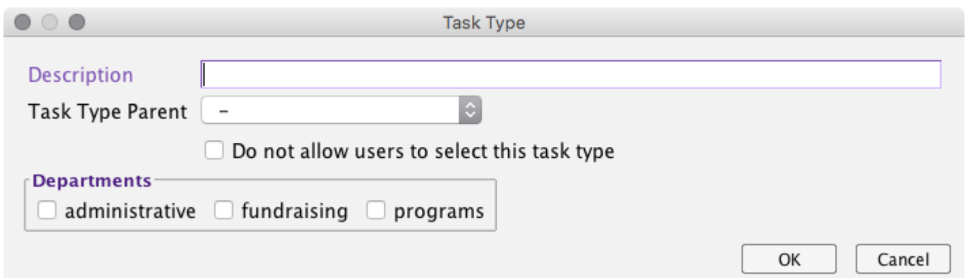
Task Types

Found in: facts, time dockets, volunteers

Sumac Volunteers allows you to define tasks that need to be performed. Each task can be of one of the task types defined in this list.

Sumac Volunteers also allows you to enter facts about each contact that indicate which types of tasks the contact likes to perform. This enables Sumac to show you the ideal contact to perform a particular task.

Task types are also used in time dockets.



Task types can be hierarchical, i.e a task type can have a parent task type. This enables you to group them, perhaps putting all event-related task types in one group and grounds maintenance task types in another group.

You can prevent a user from choosing a particular task type. This is useful if a task type is still in the database for historical reasons, but should not be used anymore. You can also use this feature to prevent a user from choosing a parent task type, if you want only the child records to be used.

Task types can be restricted to one or more departments. So if a task or time docket is for a particular department, then only a subset of task types are available.

Techniques

Found in: collections

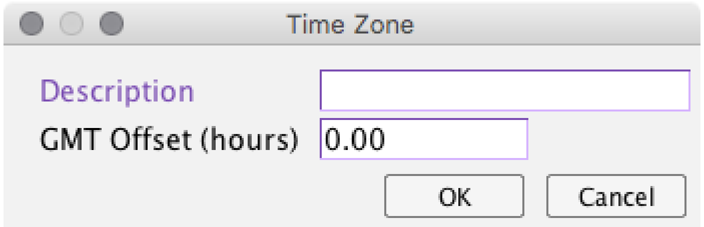
Technique is one of the physical attribute of collection objects. This attribute is chosen from a drop-down menu showing techniques in this lookup list.

Time Zones

Found in: contacts

Sumac allows you to record the time zone in which a contact resides and the time zone where your own offices are located. This helps when phoning since you can determine the correct time at the place that you are phoning.

This lookup list of time zones lets you identify the name of the time zone and also its time offset relative to Greenwich Mean Time (GMT).



Suggested Values

Here are common North American time zones.

Time Zone	*GMT Offset*	*Cities In This Zone*
Atlantic	-4	Halifax
Eastern	-5	Boston, New York, Toronto
Central	-6	Chicago, Mexico City, Saskatoon
Mountain	-7	Calgary, Denver
Pacific	-8	Los Angeles, Vancouver
Alaska	-9	Anchorage
Hawaii	-10	Honolulu

Units of Measurement

Found in: COLLECTIONS

When entering a numerical attribute for a collection object, you specify its numerical value. You also indicate the units of measurement.

Sumac lets you enter measurements in any units, and converts them to a standardized internal unit. Here is an example:

The above defines lengths that will be represented internally in millimetres. The suffix for this standard representation is mm.

This definition also allows a user to enter lengths in three alternate units: inches (alternate A), centimetres (alternate B), or metres (alternate C). Note that for each alternate, you indicate the name of the alternate unit (e.g. Inch), the conversion factor that changes the alternate unit to the standard one (e.g. 25.4 times inches gives millimetres), and a suffix that indicates the user is entering the data in an alternate units (e.g. for inches, the suffix is ").

With the above unit of measurement, if a user enters 2", Sumac will convert it to 50.8 mm.

Unsold Dispositions

Found in: AUCTIONS

When an auction lot is being defined, you can specify what should be done with it when if it is not sold. Typical dispositions include: sell at any price, and return to donor.

User Types

Found in: USERS

User Types restrict access to certain information about contacts (some communications, or some extra fields), but they do not restrict access to the contact record itself.

User types can be specified in each user's profile. User types can be used to give a user certain privileges:

- Contact: specify the contact's user type
- Communication Type: specify that only users of a certain type can see this type of communication
- Grow-Your-Own and Case Management Records: specify that only users of a certain type can view GYO and Case Management records for contacts assigned to the corresponding user type. Set this preference in Utilities/ Customize Database/Grow-Your-Own *or* Case Management.
- Users: specify the types that a particular user has or is
- Payment Batch Status: specify the type of user who can change a batch with this statuses
- Preferences/Contacts: specify the type of users who are allowed to see volunteer facts
- Schema Entries: specify the types of users who are allowed to use this schema entry

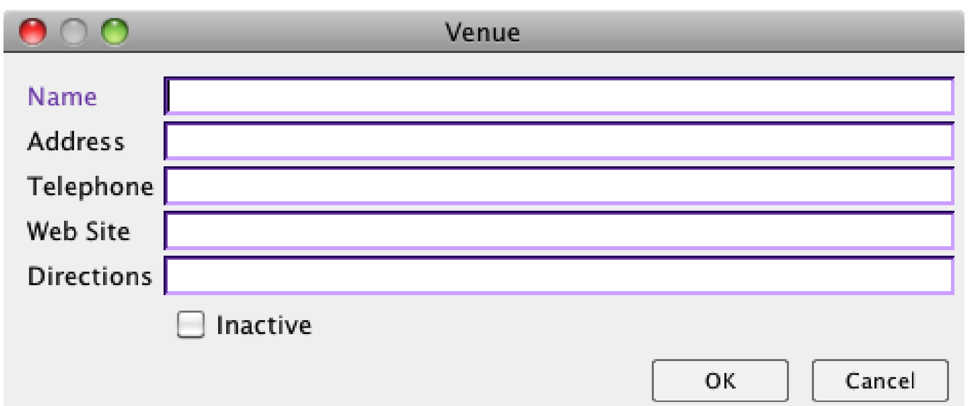
If a user does not have access to the user type of a particular contact, the restrictions to the user are as follows:

- The user cannot see communications with that contact if the type of communication indicates it is visible to only users of a certain type
- The user cannot see sensitive fields in that contact

Venues

Found in: COMMUNICATIONS, DONATIONS, TICKETS

A venue is where an event can occur. Specify the name and location of the space, e.g. a theatre, hotel ballroom. This information can be displayed by the user taking TICKET ORDERS, and is also printed on TICKET ORDERS.



Volunteer Types

Found in: VOLUNTEERS

If you use Sumac Volunteers, then this list allows you to specify the types of volunteers that are in your organization. These volunteer types appear as check boxes in contact records, so a volunteer CONTACT can have more than one volunteer type.

Reports allow you to list volunteers by volunteer type.

Suggested Values

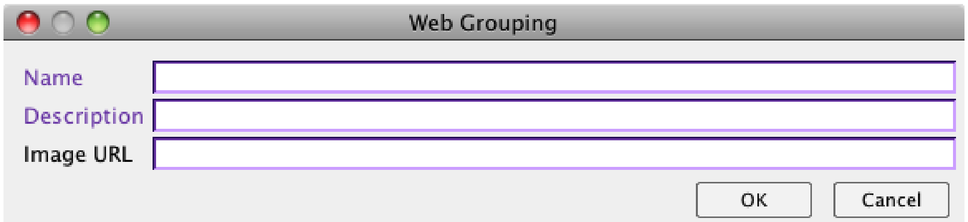
Administration
Program

Web Grouping

Found in: TICKETS

If you use Sumac Ticketing and present tickets for sale on your website, you can group productions. Perhaps you want to group them into your regular events and special events, scheduled season and summer season, or some similar break-down.

To do this, define web groupings, then indicate that certain productions (see *Event Groups* on page 213) are in this web grouping.



– End of Manual –