# Sumac Clients Tell The Story

I am really happy with Sumac and feel we made the perfect decision on software. I was very impressed with how easy the transition between systems was and how well you responded to our questions and feedback about the software.
Julie Woodyer, Campaigns Director, Zoocheck Canada

The Learning Enrichment Foundation needed a robust database to assist us not only in tracking our clients' progress, but also to assist us in weaving together the hundreds of private sector and community relationships. The Sumac team understands grassroots organizations, and was able to support an organization the size and breadth of LEF.
Peter Frampton, Executive Director, Learning Enrichment Foundation

We are now able to effectively manage a growing database of membership and professional contacts, as well as donors. Prior to installing Sumac, regular contact with our membership was a challenge – now we are able to send correspondence on a regular basis and with ease.
Rebecca Shay, Manager Outreach & Operations, Aspergers Society

Sumac software is logical, easy to navigate and efficient. The program greatly facilitates managing our member database, communications, donations and comparative reports. We are very glad to be using the program!
Katherine Carleton, Executive Director, Orchestras Canada

We're big fans of Sumac at Cahoots. First, the interface is highly intuitive which is important for a company like ours where we have a lot of volunteers and new faces coming in to update our data. Second, the product does everything we need from communications to donation tracking. Finally, the quality of customer support is superior to any other product I've seen.
Jovanni Sy, Artistic Director, Cahoots Theatre Projects

As a national organization with a staff of five, the Writers' Trust relies on Sumac to manage diverse contact groups and maintain quality communication with its donors. The database streamlines daily tasks while establishing institutional memory that will ensure future stability and growth.
Don Oravec, Executive Director, Writer's Trust

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# Roots

Every installation of Sumac includes Roots – the requisite foundation on which to build your system.


| | | |
|---|---|---|
| **Campaigns** | group contacts and produce tightly focused communications | 3 |
| **Case Management** | record and track the delivery of services | 4 |
| **Communications** | streamline and monitor all interactions with your community | 5 |
| **Contacts** | record and analyze all demographic details about constituents | 6 |
| **Donations** | process, track, receipt, and analyze donations | 7 |
| **Email** | generate and send personalized messages, newsletters, receipts | 8 |
| **Events** | record and manage event-related information | 9 |
| **Grow Your Own** | define a custom module, integrate it with the rest of Sumac | 10 |
| **Internet** | use the Internet to interact with all your constituents | 11 |
| **Payment Processing** | process credit card payments instantly | 12 |
| **Reports** | analyze data and produce information from detailed queries | 13 |
| **Time Tracking** | track, record and analyze time spent on projects | 14 |


# Specialized

Specialized modules integrate support services delivery and simplify internal management activities.


| | | |
|---|---|---|
| **Auctions** | administer an auction with ease | 15 |
| **Auditions & Submissions** | streamline management of applications, auditions and proposals | 16 |
| **Course Registration** | track enrollment, attendance, grades and course lists | 17 |
| **Fund Requests** | track applications to private and government funding programs | 18 |
| **Job Search** | match job-seeking clients with employment opportunities | 19 |
| **Memberships** | manage renewals and benefits in a multi-tiered member programs | 20 |
| **Multiple Databases** | find and communicate with contacts in multiple databases | 21 |
| **Pledges** | manage and track recurring and one-time pledges | 22 |
| **Proposals** | generate illustrations for planned giving and large gifts | 23 |
| **Prospecting** | rank contacts on concern, commitment, giving, capacity and network | 24 |
| **Reminders** | use action plans to manage tasks and time commitments | 25 |
| **Sales** | manage bookkeeping issues as you sell goods and services | 26 |
| **Ticketing** | run your own box office | 27 |
| **Tour Booking** | manage touring programs and workshops | 28 |
| **Volunteers** | identify the best person to do a job, assign and track the task | 29 |



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# Campaigns

## Overview

Non-profit organizations raise funds from an eclectic populace and provide mission-based services to an equally diverse group. Applying the same communication strategy to every demographic will not be as effective as an approach that focuses on the unique preferences of the individuals, families and organizations with which your non-profit associates.

Sumac Campaigns enables you to analyze and sort your contacts into more manageable segments, providing the ability to craft a more persuasive, personalized package that increases the effectiveness of your fundraising drive while improving staff efficiency when delivering the mission of your organization to the community.

## Features

- Specify which contacts should be included and which should be excluded from a campaign using built-in searching tools.
- Segment constituents into groups of potential donors, soliciting each group with a customized package of materials.
- Generate and track communications automatically.
- Identify revenue targets for campaigns.
- Assign staff to work on a particular campaign.
- Assign source codes to each package so that responses can be accurately tracked and recorded.
- Use reports to analyze the outcome of a campaign.
- Correlate donations, pledges and communications with campaigns for in-depth analysis.

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# Case Management

## Overview

Social service agencies providing programs in the community gather detailed information to form client profiles that help render assistance to those in need. Managing the data involved is a top priority to ensure the right people are receiving the correct services. Client information requires tracking and organizations need to record and report services delivered.

Sumac Case Management enables recording and tracking of service delivery information with ease. Built-in tools provide analysis for your operations, reporting for purposes of internal use and for external reporting to governments and other funding bodies, allowing your staff to focus on delivering your mandate and raising more funds.

## Features

- Customize constituent profiles to gather accurate information about each client.
- Manage client intake, recording information as required.
- Specify data access privileges to provide security for sensitive information, preventing client workers from viewing donation information and fundraising staff from viewing private client information.
- Record and organize different types of communications with clients.
- Produce statistical reports based on service delivery, client demographics, and client needs.
- Integrate with Sumac Reminders to identify client needs and build action plans for services appropriate to each client.
- Integrate with Sumac Time Tracking to monitor time spent on providing service, linking each client to employees or volunteers.

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# Communications

## Overview

Whether by mail, telephone, email or in-person, communicating with individuals, families and organizations forms the backbone of relationships between non-profit organizations and the community. Expressing the details of your mission and methods to every single contact is vital to maintain a steady financial base while spreading the positive influence of your organization.

Sumac Communications streamlines all the diverse interactions with your community, organizing them into useful, searchable information. Increase the productivity of your fundraising campaigns with an in-depth analysis of all your communications, providing your staff with a focused, adaptable message that is tailored to help them achieve enhanced donor stewardship and better visibility in the community.

## Features

- Record all the details of outgoing and incoming interactions between your organization and contacts.
- Measure the impact of communications and their effectiveness for the goals of your campaigns and events.
- Generate communication-related information and statistics, tracking email, mail merges, labels and campaigns using automated tools.
- Create mail that conforms to post office standards for greatly reduced postage costs.
- Record communications for an entire list of contacts (e.g. people who attended an event) with a couple of clicks.
- Relate interactions to multiple contacts, events and campaigns, enabling detailed analysis of communications.
- Restrict access to sensitive communications, ensuring confidential information remains secure.
- Record a picture of contacts, promoting facial recognition of VIPs during campaigns and events.
- Integrate with Sumac Reminders to automatically record and track detailed action plans.

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# Contacts

## Overview

The individuals, families and organizations that form the community of contacts with which you interact are as unique as the specialized mission of your non-profit organization. The ability to catalog limitless demographic information such as addresses, preferences, facts and traits provides the basis for an in-depth understanding of both individuals and the community as a whole.

Sumac Contacts is at the heart of Sumac's superior functionality, providing a completely customizable solution for rapidly recording and analyzing all the important details about contacts involved with your organization. A greater information base provides your staff with the knowledge necessary to raise more funds with a focused approach, as well as easier facilitation of your mission that benefits the community.

## Features

- Record detailed demographic information, communication preferences and multiple home, business and vacation addresses in a contact record for each constituent in your community.
- Record relationships between contacts to better understand the social network of any constituent, including business, family and casual relations.
- Supplement contact profiles with external documents in any format, such as resumes and websites.
- Document supplementary facts about education, club memberships, employment history, program interests, assets, external donations, planned gifts, qualifications, volunteer availability and preferences.
- Extend the data stored in contact records automatically, including additional, relevant information about the contact for other Sumac modules such as Sumac Fund Requests and Sumac Memberships.
- Link contact records with every module in Sumac, providing a complete description of your relationship with an individual constituent or your community as a whole.

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# Donations

## Overview

Fundraising is a critical part of non-profit organizations. The reduction of government support increases the number of organizations striving for finite funds. Competition for every available dollar demands the most efficient approach from your fundraising team.

Donations of all kinds are easily processed, tracked and receipted by Sumac, so you can spend more time developing greater rapport with current and potential donors. Streamlined operations are supported by numerous built-in reports that help strategize for your next funding campaign through an in-depth analysis of your financial profile, fostering loyal donor stewardship.

## Features

- Record all donations, including bequests, gifts-in-kind, in memoriam, member donations, split donations, event and campaign related donations.
- Provide soft credit for donations to contacts other than the donor.
- Document payment details for each donation and specify alternative recognition scenarios if necessary.
- Relate donations to events, campaigns, and funds, providing a more detailed analysis of giving patterns.
- Export data from Sumac to your accounting software, eliminating repetitive entry.
- Produce receipts on an ongoing basis or annually, in accordance with donor preferences.
- Prepare reports for financial reconciliation, for analysis (e.g. lapsed and returning donors, LYBUNT, SYBUNT), and to identify trend times (e.g. 2, 3 and 10 year comparisons).
- Generate and assign receipt numbers automatically with the option to attach customized thank-you letters.
- Integrate Sumac Membership, Sumac Sales and Sumac Ticketing modules to automatically solicit and record donations in conjunction with other transactions.
- Integrate donations with online payment processing to instantly process and authorize credit card payments.
- Extend Sumac Donations to integrate with Sumac Pledges, automatically creating recurring gifts while relating donations to pledges.
- Link Sumac Prospecting with donations and analyze donation histories and trends in order to find great candidates for increased giving.

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# Email

## Overview

Persuasive communication generates momentum for all non-profits striving for better interaction with diverse individuals, families, and organizations that form the community. Excellent email campaigns promote greater visibility and mutual understanding, increasing fundraising success while delivering mission-based functions to the community with greater impact.

Sumac Email provides your staff with customizable tools dedicated to maintaining and increasing exposure while avoiding the cost and of direct mail campaigns. Automated processes and thoughtful design combine to prevent all the potential mishaps involved in email blasts, ensuring that each personalized message reaches its specific target, elevating the effectiveness of your organization's communications.

## Features

- Send email directly from individual or group contacts, campaigns, memberships and job openings through an integrated email program.
- Register detailed communication data automatically for each email, including date and recipient.
- Build a complete view of relationships between your organization and individual prospects, donors and segments of your community.
- Tailor your communications strategy with precision and track who should and should not receive a particular newsletter, bulletin or invitation.
- Organize fundraising, advocacy campaigns, membership drives and other events with *personalized* newsletters, bulletins and invitations, increasing rates of response and participation.
- Identify incomplete deliveries with a report log that identifies problematic emails.
- Guarantee that everyone gets the message – Sumac sends each message individually to make sure that your email is not targeted as spam.

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# Events

## Overview

Many non-profit organizations present artistic and sporting events, dinners, press conferences or other special events that draw attention to their organization's mandate while increasing overall fundraising. Tracking the entire process from planning and sending invites to attendance and participation enables you to analyze the impact of an event as well as refine your approach for future considerations.

Sumac Events integrates closely with other modules in Sumac to ensure that all event-related information is recorded and managed appropriately. Built-in tools provide full searching and reporting capabilities while automated processes record vital information to give your organization an easy-to-use solution for all your upcoming events.

## Features

- Distribute custom invitations for events via Sumac Email or direct mail.
- Document all responses to invitations, producing an expected attendance list.
- Print name tags, placeholders and other identification for expected attendees.
- Track actual attendance, and compare it with previous invitations and responses.
- Record a venue, time, and other detailed descriptive information for every event.
- Flag inactive or historical events to enhance data entry speed and accuracy.
- Identify pledges, communications, and donations that result from a successful event.
- Integrate with Sumac Ticketing to record information such as seating plans, ticket pricing and other data while selling and printing customized tickets.

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# Grow Your Own

## Overview

Sumac is extensively customizable and each module provides numerous configuration options, as well as standard client-specific lists. But what if the specialized module you want is not available? The ability to build your own module is a standard part of Sumac Roots, raising customization to the next level by defining completely new types of data objects to be stored and processed using Sumac.

The Grow-Your-Own module has the same functionality as regular Sumac modules: exporting and importing, searching, mail merge, printing, sorting, linking to contacts and the use of configurable lookup lists. As with everything else in Sumac, ease of use is paramount. The entire process of defining a new data object in Sumac and integrating it with the user interface and other associated data takes a few minutes, eliminating the need to hire expensive programming experts, placing control of the software in your hands.

## Features

- Determine the name of the new data objects entered into the Sumac database.
- Define with precision the fields you need in new data objects and the fields derived from pre-configured lists of choices.
- Indicate which fields in the new data objects are mandatory and which are optional.
- Define what type of data is permissible in each field (e.g. whether an entry should be numerical, text-based or a date).
- Instruct Sumac to know which fields should appear in the search area at the top of the list window.
- Generate your own *ad hoc* reports based on standard selection, sorting, exporting and printing capabilities.
- Integrate with both Sumac Roots and optional modules to link your custom modules with standard searching, reports, email and other functionality.

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# Internet

## Overview

For many non-profit organizations, the Internet provides an opportunity to spread their message to a broader audience, providing greater access to beneficial services distributed throughout the community. The ability to effectively manipulate this powerful medium can lead to increased donor stewardship and the delivery of better services.

Sumac Internet provides the bridge needed to connect your database to the Internet, allowing your organization to take advantage of the dynamic possibilities offered by online functionality. From online donations and email newsletters to custom websites and data capturing, Sumac assists your staff with the implementation and maintenance of a streamlined solution for your Internet database requirements.

## Features

- Gather data from your website and other online sources. Accumulate and manage the information in Sumac.
- Collect donation information online using secure, online functionality.
- Distribute newsletters, messages, updates and other communications via email.
- Use mail merges to generate pdf (Acrobat) invoices, receipts and other documents for electronic delivery.
- Accumulate data from online surveys to gauge the reaction of constituents towards your organization.
- Perform auctions that provide dynamic updates for your staff.
- Integrate Sumac with other website functionalities through importing and exporting functions that also clean the data provided.
- Deliver automatically generated membership directory information via your website or email.

*Sumac provides custom online database and website development on a quotation basis.*

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# Payment Processing

## Overview

The ability to give prospective donors choice of payment method provides necessary options for potential contributors to give comfortably, easing the donation process. Superb payment processing helps prepare the additional paperwork and authorizations required to fulfill the demands of donors.

Sumac Payment Processing eliminates repetitive, time-consuming chores involved in financial transactions including donations, pledges, funders, ticket sales, retail sales and memberships. Efficient credit card processing reduces time spent on authorization, allowing staff to focus on fundraising and accomplishing the mission of your organization.

## Features

- Define your organization's connection to a payment processor and identify the types of credit cards you accept.
- Process credit card payments instantaneously over the Internet.
- Accept donations and payments for memberships, tickets and other sales of products or services.
- Process recurring pledge payments in seconds, without re-entering credit card information every month.
- Generate automated payment records that describe and track transactions.
- Process payments while receiving an order over the phone.
- Eliminate extra terminals and communication lines used for credit card authorization.
- Secure vulnerable financial information with restricted access to sensitive data.
- Automatically receive an assigned authorization code for each transaction and save it with the payment record.

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# Reports

## Overview

Accurate, detailed reporting is needed to support the fundraising and mission-based operations of non-profit organizations, demanding superb information technology to rapidly produce results. Diverse information must be stored and organized to create a strong, thorough database.

Sumac Reports automatically sorts through mounds of information, quickly replying to vital queries and supporting your staff with the quality and quantity of data needed to perform in-depth analysis of fundraising and mission based activities in your community. We take pride in the fact that Sumac provides the fastest, most functional software available to non-profits. If your organization requires a report unavailable in Sumac, we will create that report for you, free of charge, reflecting our sincere commitment to your organization.

## Features

- Generate reports rapidly with a couple of clicks. Choose a report and it appears in a few seconds.
- Print the details of a report or preview the results on-screen.
- Save your reports in a file that can be opened with other programs (e.g. spreadsheets) for further presentation or analysis.
- Create *ad hoc* reports with searching, sorting and field selection from every Sumac module.
- Specify additional details involving time periods, data inclusion and information organization with configurable reports that order Sumac to produce precise results.
- Specialized reports allow you to specify customized data groupings. For example, if you produce a donor roll grouped by giving level, you can specify your particular levels of giving.

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# Time Tracking

## Overview

How much work does your organization do? The effort of employees in forwarding your mission is one way to measure this. The efforts expended by volunteers are a large additional component of the work of non-profit organizations.

Sumac provides tools for tracking, recording, and analyzing time spent on projects. This enables effective business analysis of your organization's staff utilization, and also supports proper recognition to ensure that volunteers never feel unappreciated.

## Features

- Record the amount of time, when it was spent and who did the work.
- Record both the program and the client for whom the work was performed, enabling secondary project-level analysis.
- Produce reports to show the effort expended by staff or volunteers working on any projects in any time period.
- Integrate with Sumac Volunteers to record time spent by volunteer workers.

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# Auctions

## Overview

Auctions provide the unique opportunity to generate increased revenue while promoting awareness of the missions of non-profit organizations. Engrossing and entertaining, competitive bidding on desirable lots inevitably leads to greater personal involvement and interest in improvements implemented throughout the community.

Sumac Auctions keeps up with the pace of any auction, ensuring your staff can easily keep track of the proceedings, producing the most value from every available lot. Dynamic updates provide quick results and reports, creating more time to strengthen rapport and gather information about the participants in your organization's auction event.

## Features

- Record vital details, such as donor, buyer, lot number, date, time and amount of the newest bid.
- Create up-to-the-moment reports, avoiding potential confusion for popular lots while maximizing bids.
- Determine the minimum bid and insurance value of an item before placing the lot in the auction.
- Protect bidders by limiting access to sensitive information, providing the discretion required for silent auctions and large, conspicuous bids.
- Integrate with Sumac Contacts and Communications to add to the overall knowledge base, forming a broader, more detailed portrait of your community.
- Integrate with Sumac Payment Processing to rapidly clear credit card payments.

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# Auditions & Submissions

## Overview

Non-profit organizations that request or receive submissions for artistic and community-based programs have a specific set of challenges during the auditioning or judging process. Detailed analysis of the submissions is important to find the most appropriate submissions or most qualified people to match the requirements of your program.

Support these activities with Sumac Auditions & Submissions to streamline management of applications and proposals for festivals, service programs and other events. Frequently, program participants convert to loyal contacts for your organization. Sumac assists your staff with converting these contacts into donors, volunteers and attendees for future events.

## Features

- Ensure timely project management with tracking and reporting tools.
- Monitor project status, contents, applicants and scheduled deadlines with ease.
- Organize auditions for performing arts organizations, tracking information such as audition materials, time, location, status and genre.
- Log proposals for literary, visual arts, and film festivals to identify the appropriate talent for your organization.
- Track the agent of a contact and specific details for an audition or proposal, including status, title, date received, running time, cast requirements, technical needs, discipline, medium and draft levels.
- Integrate Auditions and Submissions into your contact list, turning program participants into donors and volunteers.

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# Course Registration

## Overview

Some non-profit organizations extend their mission to the community by offering instruction to improve knowledge in different fields. Tracking information such as prerequisites, attendance, calendars, grades, class sizes and course lists is the cornerstone of successful educational institutions.

Sumac Course Registration provides your staff with the functionality needed to eliminate the tedium of processing piles of paperwork. An effective structure of courses creates a greater sense of community involvement with your organization, increasing interest in future donations and volunteer work.

## Features

- Define courses, including detailed syllabus description, location, date and time, prerequisites and grade level.
- Enable students to view and change their own course selections.
- Specify student and course grade levels, preventing applicants from using Sumac to select inappropriate courses.
- Track funding sources for each student.
- Produce class lists to view student enrollment for each course.
- Record and track attendance at classes and marks for each assignment, test and exam.
- Generate reports including courses for each student, attendance records and student summaries.
- Enforce the maximum number of students allowed in each course by locking courses for which registrations are no longer permitted.

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# Fund Requests

## Overview

In addition to donations, pledges and other gifts, financial support for non-profit organizations is often secured through funding from government, business, and private foundations. Competition for these funds is tight, demanding a sophisticated approach in order to win support from influential programs.

Sumac assists your staff by building a detailed database of each funding program, enabling a better understanding of application requirements for various funders. Sumac Fund Requests helps to build a structured, step-by-step approach to winning funds while tracking the effectiveness of staff activity, allowing an in-depth analysis of results when planning future requests.

## Features

- Build a profile of government agencies, corporate and private foundations that fund non-profit organizations.
- Build descriptions of various funding programs operated by each funder, including objectives, application schedule, grant sizes, and related contacts.
- Record vital information about each funding program including fiscal year, assets, annual distributions and relevant contacts for communication and applications.
- Record all application outcomes to provide the information necessary for subsequent analysis.
- Compare previous programs or funder applications to identify key success factors.
- Review your history of success with different programs, comparing amount requested with amount received.
- Integrate with Sumac Reminders to dynamically track applications while getting regular reminders of upcoming deadlines and events.

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# Job Search

## Overview

Non-profit organizations that provide social services in the field of employment placement must navigate through a complex series of hurdles to guarantee the best results for their clients. Not only must the prospective employee meet the employer's requirements, the employer must also be suitable for the applicant's skill set and background.

Sumac takes care of all the data management associated with finding employment, allowing your staff to easily track and compare the unique skills of job seeking clients with the specific demands of employers. Sumac Job Search facilitates the entire process, including distribution of your client's cover letter, resume and portfolio through automated email systems.

## Features

- Enable employment counsellors to connect their clients with appropriate job opportunities.
- Identify contacts who are searching for a job and describe their skills and availability.
- Match the skills required to fill an employment opportunity with the abilities of potential candidates.
- Link vital documents such as resumes, covering letters and references for potential candidates.
- Record the details of employment opportunities such as company name, pay, location, hiring manager, skill requirements and accessibility to public transit.
- Instantly gather materials for all candidates for a job, and send them with a covering email to hiring managers.
- Document the outcome of various applications to see job opportunities and candidates matched through your organization.
- Integrate with Sumac Reminders to track each hiring situation.

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# Memberships

## Overview

Many non-profit organizations offer multi-level membership programs to raise funds while offering special access to benefits unavailable to the general public. This leads to an increase of funding that fosters a sense of ownership in the mission.

Sumac Memberships streamlines the handling of multi-tiered member programs, automatically processing payments, renewals and benefits instead of using staff resources to sort through stacks of information. Built-in reports are used to increase new members and prevent lapsed commitments, creating a stronger, more involved membership base.

## Features

- Manage many user-defined membership types, rates and associated benefits for each level.
- Process and acknowledge new memberships and donations with automated ease, allowing for rapid administration of member benefits.
- Generate a strong referral program using Sumac's relationship tracking features to prospect for new members and donors.
- Produce customized renewal invoices, reminders, membership packages and membership cards.
- Link Sumac to your accounting system to eliminate double-entry and keying errors.
- Plan cash-flow and workloads for heavy member renewal months using built-in reports.
- Maintain complete renewal history for each member.
- Track membership status with ease, including renewals, lapsed memberships and potential upgrades.
- Create comprehensive membership directories for distribution electronically or in print.
- Integrate with Sumac Email to save money and reduce paper use by distributing member newsletters and renewals via email.
- Integrate with Sumac Payment Processing to automate the collection of renewal fees.

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# Multiple Databases

## Overview

Managing multiple databases is essential for organizations that juggle multiple locations and identities or provide data management services to a variety of clients.

Sumac Multiple Databases enables arts service organizations to securely manage separate databases for each client. National umbrella organizations can use Sumac to centralize data management while providing the functionality of Sumac to regional offices. Service providers can make Sumac available via an SaaS (Software as a Service) business model.

Multiple Databases easily extends the power of Sumac to work across multiple databases.

## Features

- Back up and manage multiple databases from a central location.
- Define uniform data attributes for all managed databases.
- Create each subsidiary database with a simple dialog and a few clicks.
- Each subsidiary database operates exactly like a regular Sumac installation.
- Search to find databases for different types of organizations.
- Search in selected databases simultaneously to find contacts satisfying search criteria.
- Use mail merge to generate personalized letters and labels for contacts in several databases.
- Send personalized email messages to multiple contacts in several databases.

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# Pledges

## Overview

Establishing a stream of recurring donations is a powerful method to secure necessary funds for many non-profit organizations. Steady, predictable revenue creates a financial base that allows organizations to thrive and flourish, increasing the positive influence of your mission in the community.

Sumac provides powerful research tools that help identify then follow through on your most promising prospects for recurring or one-time pledges. Automated payment processing eliminates the work of repeatedly entering recurring pledge payment details, allowing staff to focus on obtaining new donors and pledges for continued financial support.

## Features

- Convert loyal annual donors to monthly giving programs, raising more money with greater consistency.
- Identify your best donors and prospects for monthly gift programs using built-in, analytical reports.
- Record and process pledges with ease.
- Automate pledge payment processing.
- Track variable pledge schedules including fixed length, ongoing and one-time major gifts.
- Prevent lapsed pledges using delinquency reminders and reports while flagging soon-to-expire credit cards.
- Monitor start and stop dates for pledges while issuing timely renewal reminders.
- Reduce donor attrition and costs for renewal campaigns using automated reporting processes.
- Schedule and produce combined tax receipts annually or on schedules determined by your organization or donor preferences.
- Built-in revenue projection reports support program analysis and cash flow planning.
- Create pledges that can be earmarked for a specific fund.
- Identify pledges that occurred as a result of a specific campaign or event, providing a more complete picture of the effectiveness of specific fundraising strategies.

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# Proposals

## Overview

Occasionally, non-profit organizations are presented with unique funding opportunities presented by those willing to donate large sums of money or property. Understanding the assets and preferences of donors bestowing large gifts is fundamental to winning their support.

Sumac generates sophisticated proposals, also known as illustrations, for planned giving and large gifts that fall outside the routine of campaign-driven asks, allowing your staff to customize a strategic approach. Sumac Proposals analyzes specific assets for any gift scenario, creating an optimal presentation of your organization's propositions and increasing the effectiveness of your illustrations.

## Features

- Define planned giving and large gift criteria with all the input data, calculations and generated documents needed to support these illustrations.
- Perform all the necessary calculations rapidly, creating a proposal or illustration document with ease.
- Use pre-calculated tables to perform sophisticated planned giving calculations involving life expectancy, annuities, taxes and other criteria.
- Employ spreadsheet functions such as present value and net present value to perform standard financial and tax calculations in formulas.
- Investigate different scenarios for specific types of gifts to find and propose the most appropriate one for the situation and donor.

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# Prospecting

## Overview

Every non-profit organization needs help from time-to-time in order to expand and increase donor stewardship and support. Steady growth requires focused prospecting for the right individuals to fill various roles, including potential board members, volunteers and large donors. Initiating a complex search requires superb data management and software that make it easy to express your organization's needs in a searchable format.

Sumac Prospecting supports your staff by performing the many complex calculations based on information already gathered and stored in Sumac, sifting through inappropriate results and providing the desired outcome. Sumac performs all the tedious work for your staff to better understand your prospects, focusing on those with the most potential to solicit greater funding and support for your mandate.

## Features

- Analyze donation patterns, event attendance and communications to determine the level of commitment to your organization.
- Produce a giving score for each contact based on different types of donations.
- Evaluate each contact's capacity to make donations based on information about known assets, major gifts, pledges and donations to other charities.
- Calculate a score for the extent of any contact's network of friends, relatives or associates.
- Combine different calculations to create an overall score and percentile for each contact.
- Find prospects for a moves management effort to get donors to donate more.
- Find prospective large donors for a capital campaign.
- Adjust individual scores manually if you possess external information that is not stored by Sumac.
- Define and use as many different custom ratings as you want, searching for potential donors, volunteers and board members simultaneously.

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# Reminders

## Overview

The operation of a non-profit organization requires the orchestration of countless activities. Delivering your mission to the community with success, as well as raising the funds needed to achieve your mandate, requires consistently organized action from Executive Directors to staff and volunteers.

Sumac Reminders furnishes your team with the ability to determine a series of pre-planned steps, executed when soliciting funders, performing membership renewals, introducing new volunteers and any other multi-step actions. Sumac Reminders also facilitates mission-based activities smoothly, increasing the effectiveness of the beneficial operations performed by your organization within the community.

## Features

- Build activity plans, defining a series of scheduled actions performed to accomplish a particular task, such as introducing a new volunteer or staff member, tracking a funding application or moving a prospect up the donation pyramid.
- Track and plan each move with a prospect or donor including research, networking, emails, phone calls, letters, proposals, face-to-face meetings and planned events.
- Standardize interaction plans that take your prospects along the quickest route from a prospective donor to a major donor or monthly pledge.
- Maintain an unlimited schedule for any prospect and assign actions to staff, board, solicitors and volunteers.
- Print, email or view reports of pending actions for both individual and staff assignments.
- Automatically display outstanding reminders whenever Sumac is launched.
- Automate recording of all actions, pending and completed, in detailed contact and communication records.
- Integrate with Sumac Fund Requests to effectively manage the process of applying for funding.

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# Sales

## Overview

Sales of goods and services are significant fundraisers for many non-profit organizations and can also be used as effective promotional tools. Sales may also be central for organizations delivering specialized services to the community at subsidized prices.

Sumac Sales streamlines complications such as taxes, shipping, discounts, premiums and pricing tiers, giving your staff the ability to rapidly apply secure, customized solutions for issues relating to the sales of goods and services. Sumac Sales integrates into the overall functionality of the software, completing the portrait of your relationship with the community.

## Features

- Define products and services that can be sold.
- Manage tiered price schemes including discounts and promotions.
- Support pricing structures such as fixed or percentage discounted pricing.
- Configure taxes, service charges and gift certificates with ease.
- Accept donations at the point of purchase, integrating them into a single payment transaction.
- Access customer information instantly, looking up membership, donation, sales, history and other information.
- Report on sales in any time period by service, product or purchaser.
- Assign data access rights for users to control the use of sales and pricing adjustment privileges.

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# Ticketing

## Overview

Performing arts organizations sell tickets to their presentations. Other non-profits run special events: openings, galas or fundraising dinners. These events may be central to a non-profit's mission, or may support it by informing and generating support from the community.

Sumac Ticketing helps your organization manage the details of ticket sales such as payment processing, seating assignment and ticket printing, streamlining the efforts of your staff with a single, customizable solution. Instead of resolving ticketing complications, staff can spend time developing rapport with event attendees.

## Features

- Distribute single tickets and group packages for box-office events such as fundraisers, performances, lectures and galleries.
- Configure taxes, service charges and discounts as well as gift certificates, general admission and assigned seating with ease.
- Manage tiered price schemes including promotions and fixed or variable percentages for discount pricing.
- Accept donations at the time of purchase, integrating them into a single payment transaction.
- Avoiding ticketing conflicts with dynamic updates that inform multiple users of potential issues.
- Print traceable, user-customized tickets.
- Assign seating for theatres, performances and special event tables with interactive venue maps.
- Instantly access customer information during the sale, from preferred seating and previous attendance to membership status and donor history.
- Provide useful show information to your staff, including directions and links to press releases and promotional materials.
- Perform box-office reconciliation with built-in reporting tools.
- Block seats for special uses such as VIPs, press, and handicapped access.
- Integrate with Sumac Payment Processing to instantly collect credit card payments.

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# Tour Booking

Sumac
Simply Sophisticated

## Overview

Some non-profit organizations manage tours. Some send professional speakers to venues across the country. Some present plays or other artistic or socially motivated events in school classrooms. These tours may be central to a non-profit's mission, or may support it by informing and generating support from the community.

Sumac Tour Booking helps your organization design tour programs, schedule and book performers and venues, and do the necessary bookkeeping and follow-up. Sumac brings together program design and preparation, booking, day-of details, financial, and follow-up information.

## Features

- Develop and store detailed requirements for a tour program or workshop.
- Manage all contacts involved with tours, including teachers, performers, venues, bookers, partners, sponsors and funders.
- Avoid conflicts and other scheduling problems by viewing all scheduled workshops in an intuitive calendar.
- Capture all costs including staff, travel, and materials.
- Generate invoices and track payments.
- Record feedback from any source, including teachers, performers, students, for all programs and workshops.
- Track program funders and sponsors, linking their contributions to concrete results.
- Integrate with Sumac Fund Requests to track successful fund requests and how the funds were used.

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# Volunteers

## Overview

Selfless donations of time and effort from volunteers express the altruistic nature of non-profit organizations striving to benefit the community. The importance of volunteer work makes it imperative that their efforts are used efficiently. This requires careful matching of volunteer skill, availability and task preferences to ensure that volunteers are given the appropriate tasks.

Sumac Volunteers supports your staff by streamlining all the necessary organizational duties, providing visually-based charts that compare the needs of various tasks with the abilities and preferences of individual volunteers. Sumac eases the entire process, from recruitment and analysis to performing necessary tasks and thanking those who donate effort, making sure volunteers never feel unappreciated or ineffective.

## Features

- Manage and record qualifications and skills of each volunteer or staff member.
- Assign tasks and track the status throughout the entire cycle of the assignment, as a volunteer is notified, performs the task and receives recognition for service.
- Define tasks and relate them to a department, program or event, assigning each task to an internal coordinator.
- Track the validation of qualifications and when they require re-validation.
- Create templates for frequently repeated tasks, enabling rapid definition and distribution.
- Organize volunteers by types and the group of tasks they are able or willing to perform.
- Construct open-ended tasks (on-going over weeks or months) as well as those at a specific date and time.
- Indicate qualifications required to perform each task and at a glance find the most appropriate person to complete the job.
- Record the amount of time worked on various tasks, relating it to the programs and individuals involved with your mission.
- Use pre-defined and *ad hoc* reports to analyze your volunteer data.
- Integrate with Sumac Reminders to create action plans for induction and training of new volunteers while guiding them through complete task cycles.

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