

# Sumac Communications

Before viewing this video, you should be familiar with basic Sumac operations like logging on and using lists. These are described in the video titled *Sumac Basics for All Users*.

## Introduction

In this lesson you'll learn about communications. You'll learn how to find and edit communication records. You'll also learn how to relate sets of communication records to get insight into patterns of communications.

## Bullets on Slide

Communications help:

- Manage the relationships you create with your community
- Create communication records for all interactions
- Monitor and analyze crucial rapport-building activities

Communications are used to record every interaction with your constituency. For example, if you send a newsletter to a thousand contacts, Sumac can record a thousand communication records, one for each contact, indicating that the newsletter was sent. If a contact attends one of your events, you can record a communication record that indicates the attendance. If you meet or phone a contact, you can save a communication record about the meeting or phone call.

Creating a communication record for each interaction helps monitor and analyze the effectiveness of phone calls, emails, events and other crucial rapport-building activities.

## Search

To open the Communications list window, **click the Communications button**.

If you want to find the communications that were previously saved in the Sumac database, you can search by:

specifying the earliest or latest dates of interest **[point]**

entering the first few letters of the name of a contact **[point]**

choosing an event, event type, or communication type from a drop-down list **[point]**

and by choosing a campaign from a list **[point]**

For example, if you want to find people who attended a particular event.

**Choose the event [09 Gala]** from the Event drop down menu. **Choose the communication type** that indicates attendance. Then **click search**.

Sumac shows the communications. Note that the status bar indicates how many people attended the event.

## Content of a Communication Record

To see what is in a Communication record, **double click one**.

**[point]** The Contact records with whom the communication occurred.

Communication types specifies the type of interaction that took place. **[show whole menu]** Click the Communication Type drop-down menu, to see various communication types. As with all drop-down menus in Sumac, your Sumac administrator can easily add and remove entries.

You can relate a communication to an event field by **choosing** it from the event drop-down menu. This enables easy event management, such as monitoring invitations, acceptance, and attendance.

If the communication relates to a particular campaign, **click the choose button** to view a list of campaigns. You can enter the source code of the campaign and click Choose, or alternatively **choose from the list and click OK**.

To unlink the communication from the campaign **click the Clear button**.

Source **[show whole menu]** records the origin of a communication, such as a referral from a magazine or radio advertisement.

Date **[point]** records when the communication occurred.

Notes **[point]** can hold about two pages of additional information describing the interaction.

Some users are allowed to check Sensitive **[point]** to indicate that only users with access to sensitive information should be allowed to read this communication record.

Notice that the labels for **[point]** Contact, Communication Type, and Date are coloured. This indicates that these fields are mandatory. You cannot save a communication record without these three fields being completed.

To change data in communication record window, enter new values.

When you click OK Sumac saves the communication record to the database. If you click Cancel, Sumac closes the window without saving changes. **[click OK]**

## New

To record a new communication, click the New button.

Perhaps you want to create a record that is almost identical to the last one you edited. **Click the Duplicate Last** button. This causes Sumac to create a copy of the last communication record for which you clicked OK. Then change any details that should be different.

For example to change the contact, **click the person icon**. Sumac presents a list of all contacts. Type the first few letters of a contact's last name **[type mi]** to shorten the list. If the contact is not in the list, then you can click New **[point]** to add a new contact. When you see the contact you want, click to select the contact, then **[point]** click OK. Alternatively, you can **double click a contact** in the list.

## Set Values

The Set Values button **[point]** enables you to change specific fields in many communication records at once. For example, our list shows people who attended an event, but you can see that a few records **[point]** have a different date than all the others. Probably a mistake happened while recording these communications.

To fix this problem, we could manually edit each communication record. But it is faster to use Set Values and do them all at once.

**[point and click throughout this paragraph]** Choose the communications with the wrong date, then click the Set Values button. The Set Values button is only available to users who have the Bulk Import capability in their user capability profile. Confirm that you want to change the selected records. Confirm that you really want to proceed. Enter the new date and click OK. Confirm, for one last time, that you really want to make these changes. Sumac shows the updated records.

## Buttons

The Delete, and Export or Print buttons are described in the introductory video titled *Sumac Basics for All Users*.

Click Select All to select all the communications being displayed in the list. Note that this does *not* select all communications in the Sumac database. Then you can

do operations on these selected records. For example you can delete or print all of them.

The Show Contact(s) button shows the details of the contact or contacts with whom the selected communications occurred. If you **click to select one communication** record, then **click Show Contact(s)**, a single contact's record is displayed **[cancel the contact record]**. If you **select more than one communication record** and **click Show Contact(s)**, the Contacts list appears in front of the Communications list and shows all the selected contacts. **[close the contacts list]**

## Explore

The Explore button allows you to relate sets of communication records to get insight into patterns of communications.

Suppose that you want to examine relationships between invitations, attendance and donations for a specific event.

In order to do this you have to compare three lists of communications showing:

- who was invited to the event,
- who attended the event
- and who donated as a result of the event.

### Click Explore.

You need to define three searches.

Click the New button. **Name this search**, for example *invited*. Click to specify the event. Click to indicate you want only communications of type invitation. Then click OK.

Sumac instantly performs the search and shows you how many communications match the search **[point]** and how many contacts were affected.

Sumac also draws a circle that shows how many contacts were involved in these communications. If you **click the search name** or the number in the circle you'll see a list of contacts **[point]** related to this search. You can double click a contact to see a list of communications with this contact. If you click the Show Contact(s) button, Sumac shows the same contacts in the Contacts list.

Add a second search to find people who attended the event. Click New, and **specify the appropriate search criteria**, then click OK.

Click to choose both searches and Sumac shows a Venn diagram that indicates the relationship between them.

**[explain the different numbers that are showing in the Venn diagram]**

Click New to add a third search to find out who donated. Usually if a person donated, you send a thank-you letter. So a search for communications of type thank-you letter, for the event of interest, should find donations linked to the event. Click OK.

You can click and show **up to three searches** together to show in graphic area the relationship between them.

**[explain the different numbers that are showing in the Venn diagram]**

## Conclusion

In this lesson you learned how to find and edit communication records. You saw that you can edit many communications at once using the Set Values button.

You also learned how to relate sets of communication records to get insight into patterns of communications using the Explore Button.

Communications help you enhance rapport with your community. They also promote better organizational memory for staff members.

You should now proceed to other Sumac lessons to learn more about how Sumac can help you every day.