

Sumac Contacts List

Introduction

This lesson teaches special features of the contacts list.

Before viewing this video, you should be familiar with basic Sumac operations like logging on and the management of list windows. You can get that information from the video titled *Sumac Basics for All Users*.

The content of a single contact record is described in detail in a video titled *Single Contact Record*.

Searching for contacts is taught in a the video titled *Searching for Contacts*.

Expansion

[need to set up some contacts with linked information for this]

Open the contacts list. At the start of each line there is an expansion icon. This appears differently on Macintosh and Windows computers – a right-pointing arrow on a Macintosh, a plus sign on Windows.

When you click an expansion icon for a particular contact, Sumac searches the database to find information about the contact, then displays it indented underneath the contact.

If you click the expansion icon (which has changed its appearance) again, the indented lines disappear.

You can double click and examine or edit the indented lines that appear under a contact.

What To Show

If you are only interested in certain types of information, you can tell Sumac what to show. Choose from the What To Show menu to add or remove a checkmark from certain items. Only items with a checkmark will be displayed.

For example, tell Sumac to not display Communications, then they do not appear when we expand a contact. If we want to see them again, we choose Communications from the What To Show menu.

Expand Chronologically

Notice that the expanded data is grouped by type. Communications are listed, followed by donations. Within each group, items are sorted in reverse chronological order.

If you want to inter mingle all types of data, click Expand Chronologically.

Now when you expand a contact, different types of information are intermingled, and altogether they are sorted chronologically.

Collapse All

If several contacts are expanded in the list, you can click Collapse All to collapse all of them.

Expand Selected

If you have selected a few contacts and want to expand them, click Expand Selected.

Show nn months

When you expand a contact, Sumac shows only some of the data in the database. It limits what it shows so that excessively old, and hence probably irrelevant, data is not displayed. You can specify how many months of data you want to see, by entering the number of months here. Now when you expand a contact, different data is displayed.

New

In all lists, except the contacts list, the first button at the bottom is the New button, used to create a new entry in the list. The contacts list is an exception. It has a New drop-down menu, that enables you to create contacts and information linked to contacts.

If you want to create a new Contact, choose Contact. Enter the last name of the new contact, or the organization name if the new contact record is for an organization. As you type, Sumac shows you contacts that have last names that sound like the one entered. Finding names that sound like the one you enter reduces duplicate entry caused by small misspellings. If the contact you are about to add to the database is not already there, click OK to add the new contact, fill in the contact record and click OK to save it into the database[click cancel].

If you want to add other data related to a contact, click to select the contact, then choose the type of information. Sumac creates an appropriate record, with the contact already chosen.

Household

The Household button lets you create a new household from existing contact records. Click to choose the contacts. Note that you can choose several at once. When you have chosen the contacts, click OK and Sumac presents the contact record for the new household contact. It highlights several fields by marking them red, to draw your attention to them. Examine the household record, fixing fields as required, then click OK to save it into the database.

The Household button also lets you update the members of an existing household.[do this] Choose the household you want to update. Then Add or remove members from the household. Click OK to examine the resulting contact record. Click OK again to save the updated contact record.

Mail Merge

[have Language showing as a column in the contact list]

Mail merge entails using a template – a sample document that indicates blanks to be filled in by Sumac. Sumac combines the template with data from the database to create a custom letter for each contact.

If you want to create a personalized document to send to some contacts, select the contacts. Then click Mail Merge.

If all the contacts use the same language, then Sumac shows a file selection window that lets you choose a template. If the contacts use more than one language, you are asked to choose a template for each language. If you choose a default template, it will be used for all the languages for which you do not have a specific template.

The result of a mail merge operation is one document for each contact. If you are going to print the documents, it is usually most convenient to have Sumac put all of them into one file. If you may need to handle each contact's document separately, Sumac can also create a separate file for each document.

Now you are asked to specify where to put the documents being created.

Then Sumac generates the documents.

Whenever you do a mail merge, generate labels, or send email, Sumac asks if you want to save a communication record. If you do, fill in the appropriate fields, then click OK. Sumac saves one communication record for each contact.

Labels/Envelopes

Having created a letter for each contact, you may want to print labels or envelopes so you can mail the letters. Click Labels/Envelopes.

Choose the format of the sheets of labels or envelopes you are printing. Sumac assumes that you are printing mailing addresses on each label, but note that you can print name tags. You can also customize the layout of what is printed on each label.

If you have a partial sheet of labels left over from the last printing, enter the number of the first label to print on the first sheet. You can also enter this number by clicking on the picture of a sheet of labels.

Usually you do not print the country from which the letters will be mailed.

The next two checkboxes provide two ways to get cost reduced postage in Canada. Machinable formatting prints labels in all upper case mono-spacing text, and removes punctuation between the city, province, and postal code.

Alternatively, Sumac can sort the labels in accordance with the National Presortation Schematic, so that you can presort the mail before giving it to Canada Post.

When you click OK, and tell Sumac where to show the labels, Sumac proceeds to generating the labels.

By the way, this is the standard window for viewing reports. You can scroll through pages using buttons or the scroll bar, and make the text larger or smaller. When you are finished with the labels, click OK. Again, Sumac asks if you want to save communication records to reflect this communication.

Send Email

Click Send Email to send bulk email to several contacts at once. The email window looks complex but is actually fairly simple.

Fields at the top relate to the office from which you are sending email. Sumac needs to know which office you are in because each office may have a different SMTP (mail) server.

The sender name and email address are automatically filled in from the office record. But you can change them if you want to.

Enter a subject line for the email.

Then specify the body of the email. If you choose a template, Sumac does a mail merge to generate a different email for each contact. If you want to quickly compose a message without creating a template, you can do that too.

You can choose any type of documents to add as attachments to the email.

Click Send to send the emails. Sumac then asks you if you want to save a communications record for each contact, and asks where to put a status report.

Review Facts

Review Facts allows you to see facts of a particular type for several contacts at once. You can then use them to make connections or calculations as required.

Duplicates

If two contact records are duplicates, you can merge them together. Click to select the two contacts, then click Duplicates. For each contact, Sumac shows all related information in the database; this information will be listed under one contact record when the merge is completed.

Next Sumac shows all the fields in each of the two contact records. The two contact records are in two columns, and in the last column is the result – the values that Sumac will put into the merged contact record. Note that fields that are different are displayed in red.

You can click a value under either of the two contact records to have it copied into the result column. You can also edit a value in the result column.

When you are finished adjusting, click the OK button and Sumac will merge the two contact records together.

Set Values

Set Values is used to change many contacts all at once. Select the contacts to be changed. Read and click the confirmation dialogs.

Tell Sumac whether you are changing contact types, desired communications, or other fields. If you choose contact types then a dialog asks you what changes you want to make to contact types, setting or clearing them for all the selected contacts. When you click OK, Sumac will do the changes specified.

[click Cancel and do Set Values again]

If you choose other fields, then you tell Sumac to enter a new value, or clear the value, in many different fields in the contact records.

Refresh

If you and your colleagues have been using Sumac at the same time, and they have added or changed contacts to the list, click Refresh to see the additional and changed contacts.

Report

The contacts list lets you produce some reports about selected contact records.

Info Summary provides a brief summary of a contact and recent donation history. This report is particularly useful for phone or door-to-door solicitation.

Info Details shows a great level of detail about each contact.

Related Contacts shows contacts related to the selected contacts.

Communications shows all communications with one or more selected contacts

Conclusion

In this lesson you learned about the contacts list:

Expand and contract to see information related to a contact

Create a new contact

Create and modify households

Perform a Mail Merge operation

Generate Labels

Send Email

Review Facts

Eliminate Duplicate contact records

Change many records at once using Set Values

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