

Single Contact Record

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

Sumac keeps track of your constituents – your clients, members and donors, audience, board members, staff, and other individuals and organizations.

Sumac stores all the basic information about each constituent in a contact record. Additional related information, like communications and donations from a constituent are stored in separate records which are linked to the contact record.

In this lesson you'll learn what is in a single contact record.

How to view a contact record

There are several ways to show a contact record:

If you are looking at a list other than the contacts list, you can click to select a single record, then click the Show Contact(s) button to open a contact record.

Some types of records, like reminders, contain a link icon that takes you directly to the contact record. [Janet Jones]

If you are viewing the contacts list, you can double click a contact to see its details.

Regardless of how you get to the contact record, it is always the same.

Contact record

There is too much information in a contact record to show it on the computer screen all at once. So the contact window is divided into tabs. [point to tabs] The brightly coloured tab is the one whose content is currently showing on the screen. [click different tabs, return to Basic]

You can use keyboard shortcuts to move between tabs. Hold down the alt key on Windows, the command key on Macintosh, and use arrow keys to move from one tab to another. Some tabs also have their own keystrokes, so you can jump directly to the tab. [return to Basic]

Basic Tab

Examine each tab, from left to right, starting with the Basic tab.

First, is the name of the contact. You can enter a prefix, first, middle, and last names, and a suffix. The only mandatory field in a contact record is the last name. If the contact record is for an organization, then put the organization's name in the Last/Company name field.

Note that you can choose a value from a drop-down menu to set the Prefix field. You can also manually type in a value. If you type a value that is part of a value in the drop-down menu [type ms], then Sumac fills in the rest.

Include whatever birthday information you know. If you enter a year, with or without month and day information, Sumac calculates the approximate age of the contact. If you know the month, Sumac can help you generate birthday greetings at the appropriate time.

The gender drop-down menu specifies the gender of an individual. Alternatively, if the contact record is for an organization or household, the gender should be chosen appropriately. When you choose Organization as the gender of a new contact record, Sumac asks if you want to copy the last name to the business address; usually you do want this done, since it saves retyping the contact name later.

If the gender is not for an organization, then the gender drop-down menu also contains a Change command which helps you change a contact record to an organization, moving around name, salutation, and recipient fields appropriately.

When you click one of the checkboxes for Deceased or Moved, Sumac asks about clearing address fields. This helps to ensure that you do not accidentally send communications to an invalid address.

Some users are allowed to mark a contact as Sensitive, so that only certain users are allowed to see the details of the contact record.

If a contact is Inactive, it appears dimmed (grey) in the contacts list. Also, when Sumac asks you to choose a contact, you are not allowed to choose an inactive contact. Only a Sumac administrator can click this checkbox. An inactive contact cannot be edited by anyone except a Sumac administrator.

The Renewal date can record a date when you should communicate with a contact. For example, if the contact always sends a donation in April, you might want to set the renewal date to March. Your Sumac administrator may have renamed the Renewal date to something completely different that more accurately reflects how your organization will use it.

Salutations hold the text that goes after "Dear" at the start of a letter. In grey letters under each of these fields, Sumac shows the default it will use if you do not enter anything into the salutation field. Your Sumac administrator specified how the

default salutations should be formed. If, for a particular contact, the default salutation is not correct, you can override it by typing into the field

Contact Source lets you record how a contact first heard about your organization, or where you got the information about this contact.

If your organization operates across multiple time zones, you can enter the contact's timezone. Similarly, if you operate in multiple languages, you can specify up to two languages for each contact.

There is a row 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, for example Anonymous, or from the family foundation.

There is a free format notes field, but you can usually find a better place to put information than in notes.

The Alert field holds a message about a contact that requires special handling. If a contact has an alert message[type big donor], then the contact is red in the contacts list. The alert message will be displayed whenever anyone opens this contact record.

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.

The next thing you can specify is Type of Contact. [click board, committee]. Note that you can check any number of checkboxes for a single contact.

Outbound communication desired keeps track of how your contact wants to keep in touch. Click the check boxes to select the desired communications.

Relations tab

The Relations tab lets you record connections between contacts in your database. You can specify employment relations, family relations, friendship relations, or any other relations that are useful to your organization.

Click New to create a relation. Choose from the drop down menu the type of relation being recorded. Click to choose the second contact in the relationship. Enter the last name to narrow the list of contacts and click the contact you wish to choose.

If you are entering a relationship with someone at the same address as the main

contact, you can save time by telling Sumac to copy one or more address fields from the related contact record.

Use the Delete button to delete a relationship. If you click to select a single relationship, you can click Show Contact to view that contact's record.

Residence Address Tab

The residence address tab holds the contact's residence paper and electronic mail address.

The Recipient field works much like the Salutation fields in the Basic tab. If the grey text underneath the field is correct, then you do not need to enter anything into the Recipient field. If necessary, you can enter text to override the proposed grey text.

For City, State or 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[key to in city], then tab out of the field, the full entry is chosen from the lookup list. When you put a value into one of these fields, Sumac capitalizes it. If the style of capitalization seems inappropriate, the Sumac Administrator can tell Sumac to use other styles of capitalization.

When you enter a postal code or phone number, Sumac automatically formats them appropriately. Sumac automatically handles 7 and 10 digit North American style phone numbers. If you need to enter a phone number in a different format, start it with a plus sign.

You can record up to two residence email addresses. Note that you can also specify which email addresses should be used when Sumac sends an email to this contact. This enables you to have a single contact record for a household and send to multiple people in the household.

There are link icons beside the email addresses and the web site. If you click the link icon for a web site, Sumac opens the default browser on your computer and opens the specified web site. If you click the link icon beside an email address, Sumac runs your default email client program and starts an email for you. It also create a Sumac communication record so that you can record that you sent the email.

The Copy To Clipboard button copies the complete residence mailing address to the clipboard so it can be pasted into other applications. This saves time in manually copying from each address field, and pasting into a letter or label.

The Duplicate Last button puts the values last entered into these address fields, in

a previously edited contact record, into this contact record. If you are entering contact information for several people at the same address, this button eliminates the need for repetitive data entry.

Business Address Tab

The business address tab is similar to the residence address tab but adds places to store business-related information such as title, department and organization fields. It also includes fields for a contact's assistant.

The other significant thing to note on the business address tab is the Use this address for mailings checkbox. If you are sending a paper mailing, Sumac uses the vacation address if its dates indicate the contact is at a vacation property. If the vacation address is not applicable, then Sumac uses either the residence or business address. It uses the residence address unless you check this checkbox to indicate that the contact wants mail sent to the business address

Vacation Address Tab

The vacation address tab is much like the residence and business addresses, but it also includes effectivity dates to indicate when the contact is at his vacation property. Note that you can indicate that the effectivity dates apply in subsequent years.

Facts Tab

The Facts tab lets you record a variety of pieces of information about a contact. In other systems, you may have been accustomed to recording this type of information in a free form notes field. The problem with Notes fields is that they are unstructured and difficult to organize and search. So Sumac provides a more orderly place to put this information.

When you click the New button, you get a dialog that lets you enter a variety of facts. The first two groups – Personal History and Contact – facts are available in all installations of Sumac. The Volunteer facts are only available if you have the volunteer module.

Education facts let you record where a person went to school. Club memberships allow you to record that a contact is in the Shriners, the Rotary Club, or any other club or society. Employment facts let you record that a person used to work in a particular industry at some time in the past.

External Document facts let you link other documents, perhaps a resumé stored on your file server, to a Sumac contact record.

Award facts record that a person received some sort of public recognition award.

Program Interest, Preferred Content, and Preferred Medium facts let you record in greater detail the types of communications you should send to a contact. This lets you expand on the Outbound Communications Desired checkboxes in the Basic tab.

The Giving History tab lets you record gifts made by the contact. These are not gifts to your own organization, since they would be recorded as Donation records. Instead, use a Giving History fact to record other gifts made by this donor. Perhaps you read in the paper this morning that the contact made a big gift to a local childrens charity.

If you might be pursuing potential donors for large gifts, it helps to have a profile of whatever assets they own. Asset facts let you record these.

A small percentage of people who put your organization in their will tell you about it. You can record this information in a Known Planned Gift.

The volunteer facts let you figure out what a contact wants to do [point at Preferred Task], what the contact is qualified to do [point at Qualification], and when the contact is available or not available [point at Available and Unavailable] to work for you. You should also note Recognition that has been given to the contact for his or her work in the past.

Each type of fact presents its own window for entering details. If you click to enter an Education fact, you get a window that lets you specify additional information about the contact's education.

Picture Tab

The Picture tab gives you the ability to save a picture of a contact into the Sumac database. It is sometimes useful to have a head shot of a person to jog your memory before a meeting. The picture must be of type gif or jpg, and cannot be bigger than 80KB.

Funder Tab

If your installation of Sumac includes the Fund Request module, then you can enter additional information that describes a contact as a source of funds.

Membership Directory Tab

If your installation of Sumac includes the Membership module, then you can specify how Sumac should create a membership directory entry for this contact.

History Tab

This History tab lets you see all information in the database that relates to this contact. Click the Show button to tell Sumac to fetch all the data. You can double click any entry in this list, and see or change its details.

Extra tabs

Your Sumac Administrator may have defined one or more extra tabs to hold additional information that is specific to your installation of Sumac.

Keyboard Shortcut In Contact Records

There is one more thing to mention about entering and editing contact records. If you enter a quote mark into a field, then tab out of the field, Sumac enters the value that was last put into that field on another contact record.

For example, if you type a street address into a contact record, then go to another contact record and type a quote mark into the street address field, Sumac enters the street address entered previously.

Conclusion

In this lesson, you learned how to show a contact record and what a contact record contains.

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