



**SUMAC**

-

## **QUICK START GUIDE**

**(Windows)**

**January 2023**

# SUMAC

## QUICKSTART GUIDE

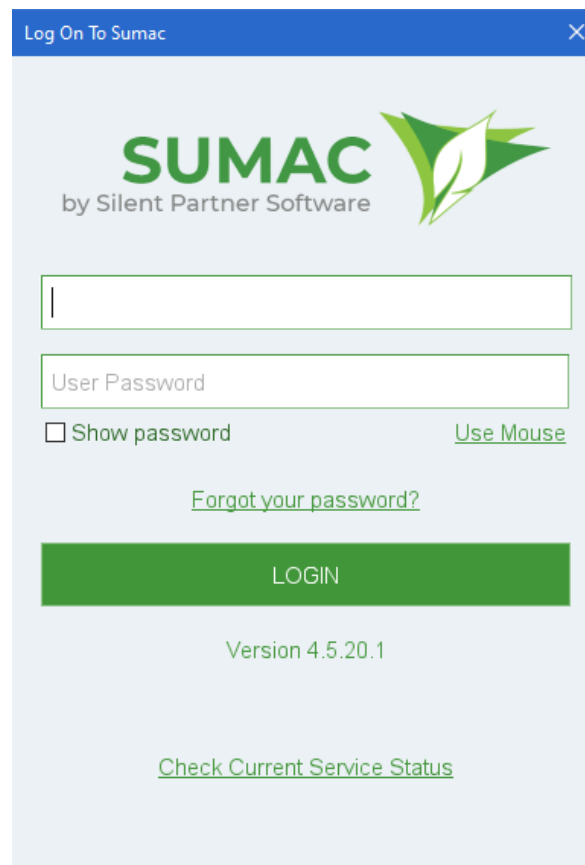
### How do I install the software

To install Sumac:

1. Please go to <https://sumac.com/install/>
2. Download the installer that corresponds to your operating system
3. Run the installer and launch Sumac
4. At the login page, enter this information:  
**Username:** *your username provided by National office*  
**Password:** *your password provided by National office*  
**Organization name:** Air Cadet League of Canada  
**Organization ID:** 1578

### How do I log on

Double click on the application file. The following logon window will pop up:



Log On To Sumac

**SUMAC**  
by Silent Partner Software

User Password

☐ Show password [Use Mouse](#)


[Forgot your password?](#)

LOGIN

Version 4.5.20.1

[Check Current Service Status](#)

Once you log on the following screen will appear.

  
by Silent Partner Software


Dashboard

Contacts

Communications

Donations

Utilities



**TESTPC**  
User  
Air Cadet League of Canada

Today is Thursday, May 19, 2022

**Help and Resources**

Sumac Blog

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Support Portal

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**Contacts**

Contacts Available19514/30000

Contacts Added10486

**Donor Summary**

New Donors

This Month0

This Year9

Lapsed Donors

This Month3

This Year178

Donor Retention

	2021	2022
Donor Count	187	9
Percentage	100%	5%

**Donation Summary**

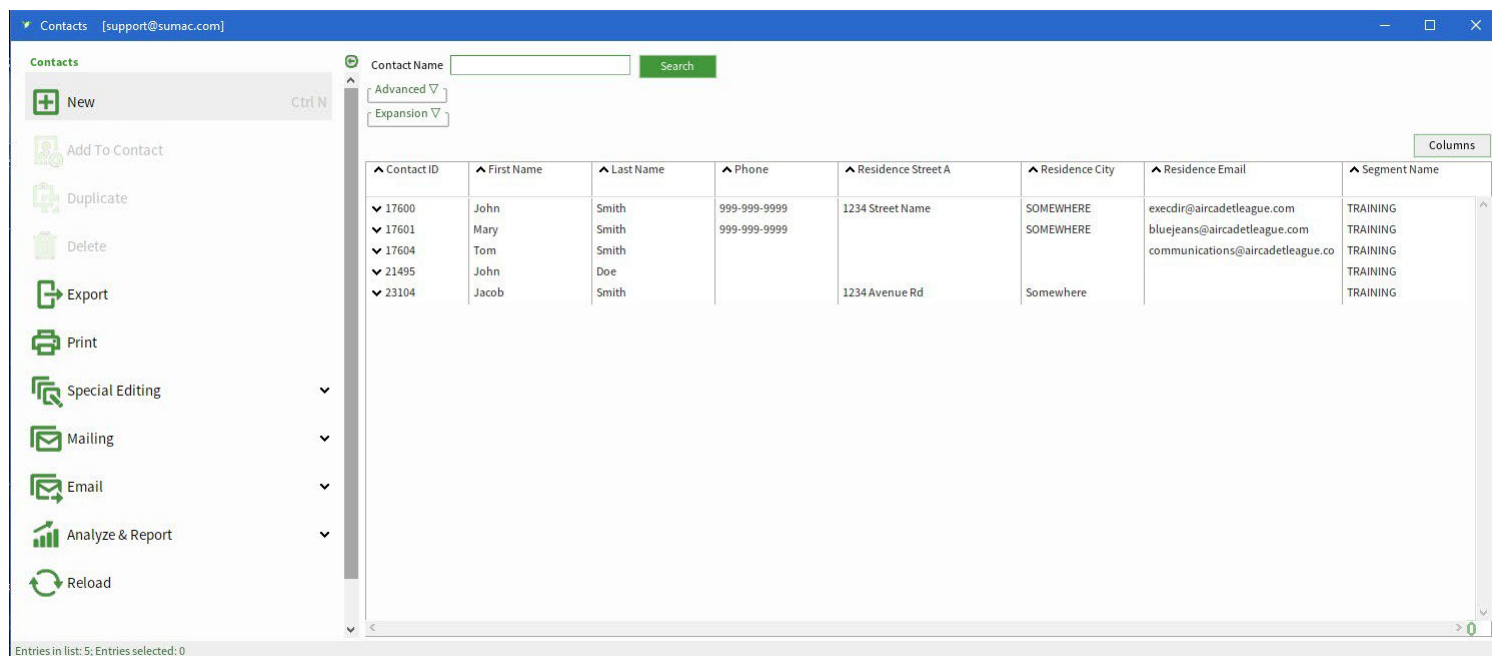
	Count	Amount	Largest	Smallest	Average	Median
This Year	0	\$0	\$0	\$0	\$0	\$0
This Month	0	\$0	\$0	\$0	\$0	\$0
Last Month	0	\$0	\$0	\$0	\$0	\$0

Let's make a difference in the world today!

[About Sumac](#)

# Contact Module

Clicking the “Contacts” button on the Sumac Console will bring up the following screen:



This window will show the list of all the contacts in your province. In the above example, there are only five contacts in the database. From here, there are several things you can do.

The left panel includes a number of buttons, including: New, Print, Special Editing, Mailing, Email, Analyse & Report, Settings, Reload and Help Videos & Resources. Each of these offers capabilities that are explained in the Sumac Users Guide. But the following will provide the information you need to get started.

## Columns Icon

This button (located in the top right corner of the table) presents a dialog that allows you to choose (by drag and drop) the fields that you wish to show in the CONTACTS list. You can also control the order of the field by dragging them in the preferred order. Additional information can be found by following this link <https://support.sumac.com/portal/en/kb/articles/how-to-customize-what-you-see-in-the-list-view>

## Search Builder

The Search Builder enables you to graphically construct searches for CONTACTS, based on searching fields in the CONTACT records themselves, and then show the list of CONTACTS found by the search. Additional information can be found by following this link <https://support.sumac.com/portal/en/kb/articles/search-builder-5-59>

## New

When you click New, the “Enter New Contact” window appears (as shown on the next page) Enter basic details for a new Individual or Organization. As you enter the name (last, first, organization), Sumac shows you a list of contacts already entered providing the same results.

You can double click on any of the generated contacts to see if they are the same as the Individual or Organization you are entering.

Enter New Contact

1

Indicate an individual or an organization.

Video

Individual

Organization

2

Enter information about the new contact.

First Name

Last Name

Smith

Organization

Phone

Extension

Residence

Business

Email

Residence

Business

3

To avoid duplication, review the list of contacts with similar sounding last names. Exact matches appear in red.

Columns

Similar Name	Same Email Address	Contact ID	Name (Last First)	Pref Phone	Pref Street A
<input checked="" type="checkbox"/>		23104	Smith,		1234 Avenue Rd
<input checked="" type="checkbox"/>		17600	Smith,	999-999-99	1234 Street Name
<input checked="" type="checkbox"/>		17601	Smith, Mary	999-999-99	
<input checked="" type="checkbox"/>		17604	Smith, Tom		

OK

Cancel

If the generate list does not provide the contact you are looking for you can click ‘OK’ to create the new contact. Sumac will open a new contact record where you will be able to enter all of the information you have on this contact.

Contact

Basic

Relations

Residence Address

Business Address

Facts

Picture

History

Extra

H & A

Screening

Name

Prefix

First Name

Middle Name

Last Name

Suffix

Salutations

Letter Salutation

Informal Salutation

Languages

Language

Language 2

Contact Types

Alumni

Career Expo

Donor

Employee

LIP

Volunteer

Communication Preferences

INITIATE SCREENING RENEWAL

ACL ID

Unit (for ID card)

Personal

Birthdate

Birth Year

Birth Month

Birth Day

Marital Status

Gender

Pronoun

Origin

Contact Source

Originally Entered

Time Zone

Donations

Annual receipt

Not receiptable

Recognition

Status

Deceased

Moved

Inactive

Sensitive

When Deceased

Alert

Notes

Security

Segment

TRAINING

OK

Cancel

You will note the various “tabs” across the top of the record. To enter additional data, just click on any of these tabs and enter the data in the appropriate field.

For volunteers, the information you mainly want to enter is the database will be on the following tabs: Basic, Residence Address, Picture, History and Screening.

Let’s start with these 5 tabs. (The remaining tabs will be explained after.)

We’ve highlighted the basic information that should be entered for each contact.

## **“BASIC” Tab**

The screenshot shows a web-based contact management interface. At the top, a blue header bar displays the contact name 'Contact (17600 Smith, CD, John)'. Below this is a tabbed interface with the following tabs: Basic, Relations, Residence Address, Business Address, Facts, Picture, History, Extra, H & A, and Screening. The 'Basic' tab is currently selected. The form is organized into several sections:   
 - **Name:** Fields for Prefix, First Name (John), Middle Name, Last Name (Smith), and Suffix (CD).   
 - **Salutations:** Fields for Letter Salutation and Informal Salutation, both with 'John' entered.   
 - **Languages:** Fields for Language and Language 2, with 'English' and 'French' selected.   
 - **Personal:** Fields for Birthday (1990-01-01), Marital Status (Married), Gender (Male), Pronoun, Contact Source, Originally Entered (2019-05-26), and Time Zone.   
 - **Origin:** Fields for Contact Source, Originally Entered, and Time Zone.   
 - **Donations:** Checkboxes for Annual receipt, Not receiptable, and Recognition.   
 - **Status:** Checkboxes for Deceased, Moved, Inactive, and Sensitive.   
 - **Alert:** A text area for alerts.   
 - **Notes:** A text area for notes.   
 - **Security:** A dropdown menu for Segment, currently set to 'TRAINING'.   
 - **Contact Types:** A section with checkboxes for Alumni, Career Expo, Donor, Employee, LIP, and Volunteer (checked).   
 - **Communication Preferences:** A section with checkboxes for Do Not Contact, Do Not Mail, Do Not Solicit, Email, Letter, Newsletter (checked), Paper Mail, Screening Files, Screening Notes, Service Medals, Telephone, and Training.   
 - **INITIATE SCREENING RENEWAL:** A date field set to 2020-12-15.   
 - **ACL ID:** A text field.   
 - **Unit (for ID card):** A text field set to 'Sq9 999'.   
 At the bottom of the form, there is a status bar that reads 'Entered by ExecDir; Updated 2022-07-14 by AdmO'. On the right side of the status bar are 'OK' and 'Cancel' buttons.

Most of the field are pretty straight forward, but here is some additional information for some of the fields.

**Prefix** – you can choose from the drop down menu or type in this field.

**Contact type** – you can check multiple boxes.

**Communication Preferences** – you can open and close this tab by clicking on the triangle.

**INITIATE SCREENING RENEWAL** – this field will automatically generate once the screening information is entered in the screening tab.

**ACL ID** - The ACL ID will be displayed on the volunteer ID card. (please use the Sumac ID number, this number can be found on the top right of the contact tab before the name, this number is automatically generated by Sumac when the contact is created.)

**Unit (for ID card)** – This Unit will be displayed on the volunteer ID card. (this section can only contain a maximum of 8 characters, please use the following format: Sqn ###, AB PC, BC PC, MB PC, NB PC, NL PC, NS PC, ON PC, PEI PC, PT PC, QOV PC, SK PC, depending on which level the volunteer falls under.)

**Originally Entered** – this field will automatically generate once the contact is created.

**Status (Deceased, Moved, Inactive, Sensitive)** – You can check any of the options to update the contact and omit this contact from future generated lists. Please note that these boxes can only be unchecked by the National office.

**Alert** – Any information entered in this box will create a pop-up that will come up when trying to open the contact.

**Notes** – Information entered in this section is mainly meant for record keeping (e.g. if you change any information in the contact file and want to keep the previous information somewhere)

**Segment** – VERY IMPORTANT to assign a segment to your contact, please choose from the drop down list, this prevents other provinces from seeing your contacts. Please note that everyone can see the RED FLAG segment as well as their own province.

**Red Flag** – Any individual with a criminal conviction or vulnerable sector check conviction will appear in this section.

## **“RESIDENCE ADDRESS” Tab**

Contact (17600 Smith, CD, John)

Basic Relations **Residence Address** Business Address Facts Picture History Extra H & A Screening

Recipient: John Smith CD

Street A: 1234 Street Name Apartment:

Street B:

City: SOMEWHERE

Province: QC

Country: CANADA

Postal Code:

Phone: 999-999-9999 Extension:

Phone: Extension:

Cell Phone:

Fax:

Email: execdir@aircadetleague.com ☒ Send to this email address

Email 2: ☐ Send to this email address

Website:

Copy To Clipboard Duplicate Last Get Address From Related Contact

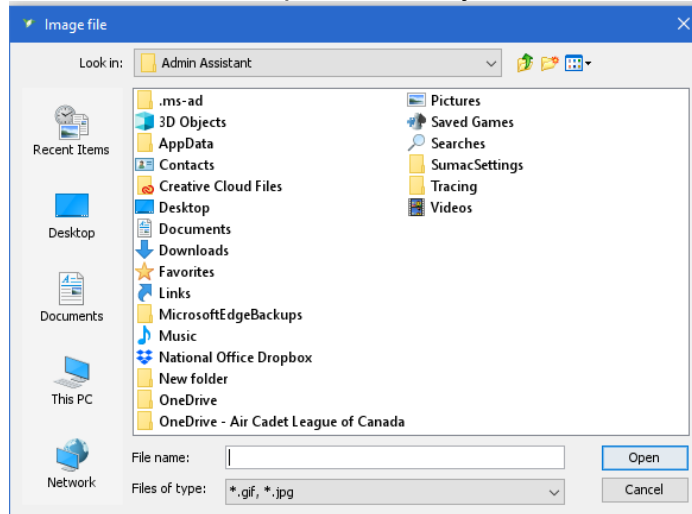
Entered by ExecDir; Updated 2022-07-14 by AdmO

OK Cancel

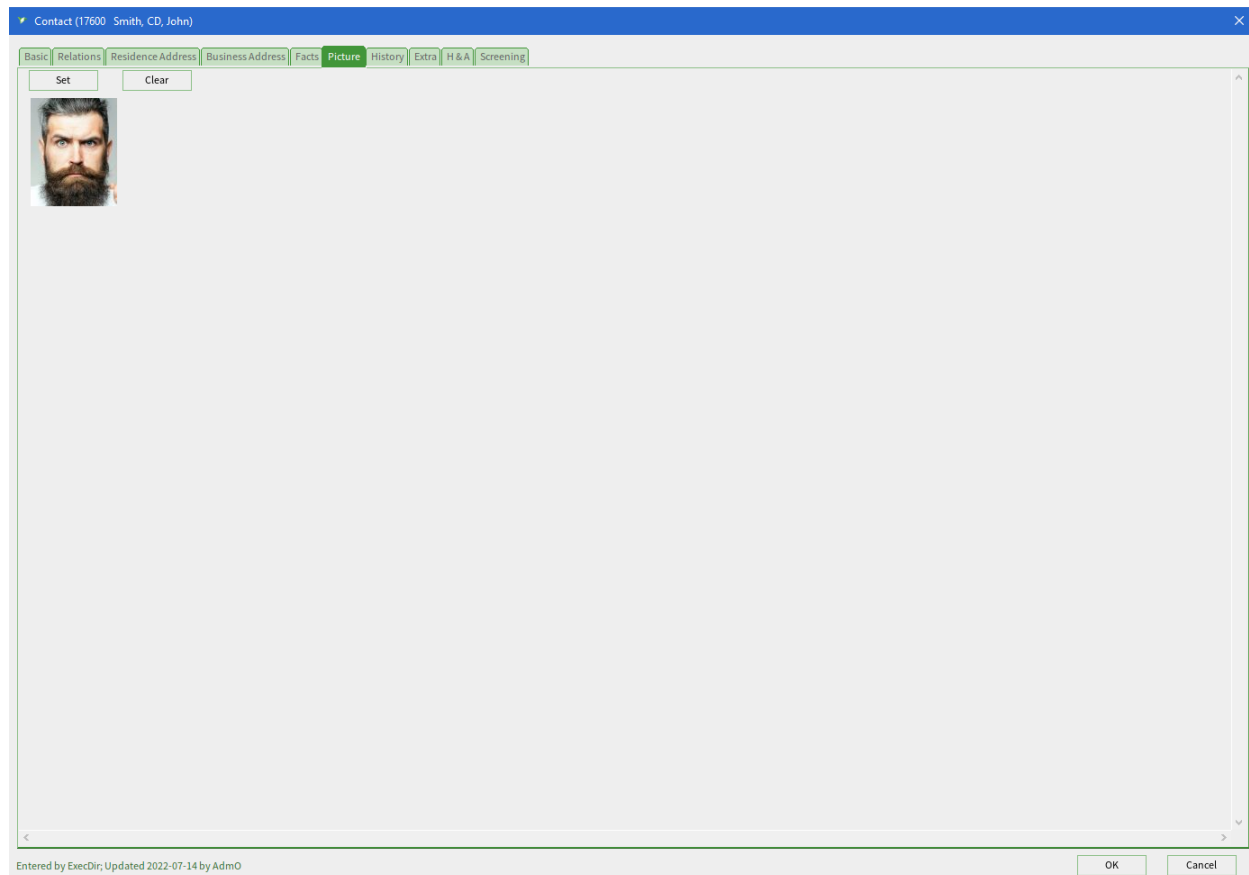
## **“PICTURE” Tab**

Uploaded pictures need to be 1” x 1.25” and can only be upload in \*.gif and \*.jpg format.

To upload a picture, click on “Set”, choose the picture from your database and click “Open”



To change the picture simply click on “Clear” to remove it and click “Set” to chose a new one.





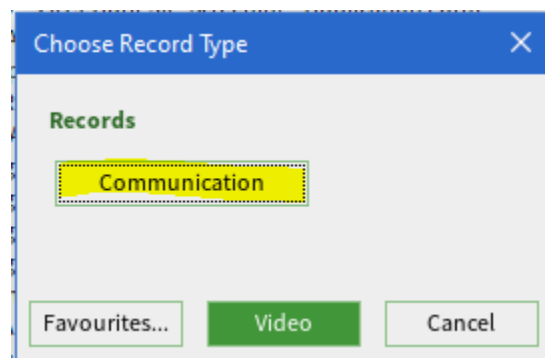
## **“HISTORY” Tab**

When the system is used to create an ID card or enter a donation, a pop-up will ask you if you want to save a communication of this record. If you choose “Yes” this is where the record will appear.

The screenshot shows the 'History' tab for a contact named 'Contact (17600: Smith, CD, John)'. The interface includes a navigation bar with tabs: Basic, Relations, Residence Address, Business Address, Facts, Picture, History (selected), Extra, H & A, and Screening. Below the navigation bar is a 'Donation Summary' section with a table showing financial data for years 2013 to 2022. The table has columns for 'Receiptable Amount', 'Total Amount', 'Yearly', and 'Cumulative'. Below this table are buttons for 'Add To Contact', 'Delete', and a 'What To Show' dropdown. The main area displays a list of records with columns for 'Record Type', 'Date', and 'Summary'. The records include various communication types like 'ID CARD', 'Screening Files', 'Receipt', 'Email', and 'Reminder' with their respective dates and descriptions. At the bottom, there are 'OK' and 'Cancel' buttons.

Record Type	Date	Summary
Communication	2022-07-14	ID CARD -- ID CARD. Front.rtf; screening expiry on Mar 28, 2025
Communication	2022-04-04	Screening Files -- 2019-April-30 - Screening - Application Form
Communication	2022-01-25	ID CARD -- ID CARD. Front.rtf
Communication	2021-06-04	Receipt -- Template_Tax receipt_QOV_2021.docx; Not an actual donation
Communication	2021-04-20	Receipt -- Tax Receipt No Letter.pdf; issued duplicate receipt
Communication	2021-04-20	Receipt -- SUMAC template. Canadian-Style-Donation-Receipt 2018.pdf; Donation receipt issued
Communication	2021-02-16	Email -- email generated from screening renewal notice.html; this is a test email
Communication	2021-02-16	Email -- email generated from screening renewal notice.html
Communication	2021-02-16	Email -- email generated from screening renewal notice.html
Communication	2021-02-16	Email -- email generated from screening renewal notice.html
Communication	2020-01-09	Reminder -- email generated from screening renewal notice.html; Reminder for screening
Communication	2020-01-07	Receipt -- ID CARD. tempate. epic.rtf
Communication	2020-01-07	Reminder -- quick entry email; sent to leaguehq; sent to excedir; bcc petesue
Communication	2019-06-14	Email -- email generated from screening renewal notice.html; screening renewal reminder
Communication	2019-06-07	Email -- email generated from screening renewal notice.html; reminder
Communication	2019-06-07	Email -- email
Communication	2019-06-07	Email -- email generated from screening renewal notice.html; reminder
Communication	2019-06-07	Email -- email generated from screening renewal notice.html; screening renewal notice
Communication	2019-06-06	Email -- ID CARD. tempate. epic.rtf; printed ID card on 6 jun 19
Communication	2019-06-06	Email -- email generated from screening renewal notice.html; screening renewal notice
Communication	2019-06-06	Email -- ID CARD. tempate. epic.rtf; printed ID card on 6 jun 19
Communication	2019-06-05	Email -- screening renewal reminder sent 5 jun 19
Communication	2019-06-04	Email -- test
Communication	2019-06-04	Email -- Confirmation of Donation-1.html; sent screening reminder email
Communication	2019-05-26	Email -- email reminder sent on 26 May 2019 for screening renewal
Donation	2021-04-20	receipt 2021-04-20; amount=20.00; Campaign: 2021-2022 Annual

To add files to a contact click “Add To Contact”, click on “Communication” in the pop-up box.



Choose the communication type from the drop down menu (e.g. screening files, letter, email, etc..)

Add notes if wanted, these notes will appear in the main page after the upload is complete.

Click “Upload” to choose the file in question.

(If the document you are uploading is screening documents or anything containing sensitive information, please click the “Sensitive” box.

**Communication**

Contact: Smith, CD, John

Communication Type: Screening Files

Event:  Choose Event Clear

Campaign:  Choose Campaign Clear

Source: -

Date: 2022-07-27

Expiry on 17-Jan-2027 21/8192

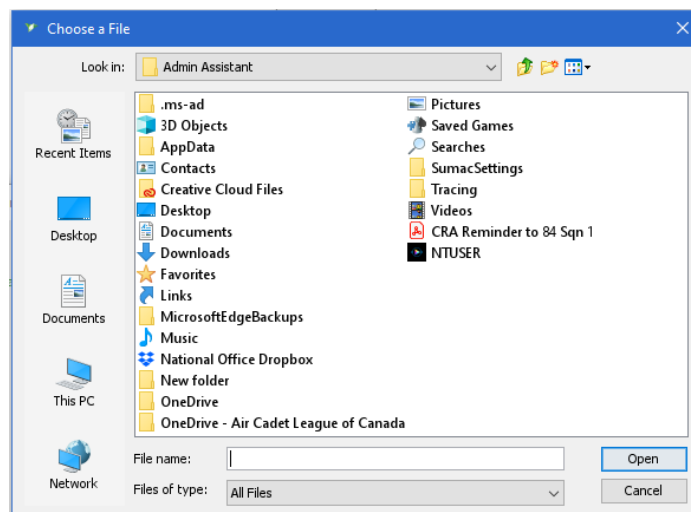
Notes (complete)

File:  Upload Database Clear Open

☒ Sensitive

Entered by TESTPC

OK Cancel



Choose the file from your database and click “Open”

The system will generate a name for the file, you can see this in the “File” field, click “OK” to upload to Sumac.

**Communication**

Contact: Smith, CD, John

Communication Type: Screening Files

Event:  Choose Event Clear

Campaign:  Choose Campaign Clear

Source: -

Date: 2022-07-27

Expiry on 17-Jan-2027 21/8192

Notes (complete)

File: dbfile/461 TEST Upload Database Clear Open

☒ Sensitive

Entered by TESTPC

OK Cancel

## **“SCREENING” Tab**

Contact (17600 Smith, CD, John)

Basic Relations Residence Address Business Address Facts Picture History Extra H & A **Screening**

**MEMBERSHIP STATUS**

Status

☐ Active ☐ Lapsed ☐ Pending - New ☐ Pending - Renewal

**SCREENING STATUS**

ACL Join Date 2006-02-01

Screening Date 2016-03-15

Screening Expiry Date 2021-03-15

Screening Type

Police Record Check, EPIC

☒ Police Record Check ☒ EPIC ☐ VSC

☐ Positive PRC Result

☐ Red Flag

Comments \*

0/255

**POSITIONS HELD CURRENTLY**

☐ Chairperson

☐ Vice Chair

☐ Treasurer

☐ Secretary

☐ Committee Member

☐ SSRC

☐ League Representative

☐ Civilian Volunteer

Director

Other

Comments / Past Positions Held \*\*

0/255

**INITIAL SCREENING CHECKLIST**

Application Received from SSRC

Missing Documents

0/255

Entered by ExecDir; Updated 2022-07-14 by AdmO

OK Cancel

**Status** – Check box relating to current volunteer status (this option becomes handy when you want to know how many Active, Lapsed, Pending – New, Pending Renewal in your database). Can also be added in the “Extra” tab

**ACL Join Date** – This date relates to the first day the volunteer or member became active with the League.

**Screening Date** – Date screening is fully completed. (entering this date will auto-generate “initiate screening renewal” field in “Basic” tab







**Screening Expiry Date** – The field will auto generate. (5 years after the screening date)

**Screening Type** – Please check all that apply.





**Positive PRC Results** – Please check if police record check shows a criminal conviction

**Red Flag** – Please check if a Vulnerable Sector conviction shows up. This information will be provided to all of the Segments for reference. (Notes on the convictions can be added to “Basic” tab under “Alerts”

**Positions Held Currently** – Please check all that apply.

INITIAL SCREENING CHECKLIST	
Application Received from SSRC	<input type="text"/> 
Missing Documents	<div>0/255 </div> <div></div>
Files uploaded to QNAP	<input type="text"/> 
File Completed	<input type="text"/> 
ID Card Issued	<input type="text"/> 

**Initial Screening Checklist** – Fill in all fields as required upon initial screening process

RENEWAL SCREENING CHECKLIST	
Expiry Reminder Sent	<input type="text"/> 
CRC/EPIC/VSS Received	<input type="text"/> 
Files uploaded to FTP Server	<input type="text"/> 
ID Card Issued	<input type="text"/> 

**Renewal Screening Checklist** – Fill in all fields as required upon screening renewal.

**Click “OK” at the bottom of the page to save the information to the contact.**

Additional Information:

### **“RELATIONS” Tab**

If you have multiple family members volunteering with the League, you may add this information in this tab. Simple click “New” at the bottom of the screen, define the relation and click “OK”.

### **“BUSINESS ADDRESS” Tab**

This tab is mainly used for contact information stored on companies/organizations. (name of contact person, address, email, phone, etc..)

### **“FACTS” Tab**

This tab can be used to add detailed information about the contact, such as personal history, education, clubs, employments, personal awards, personal interests.

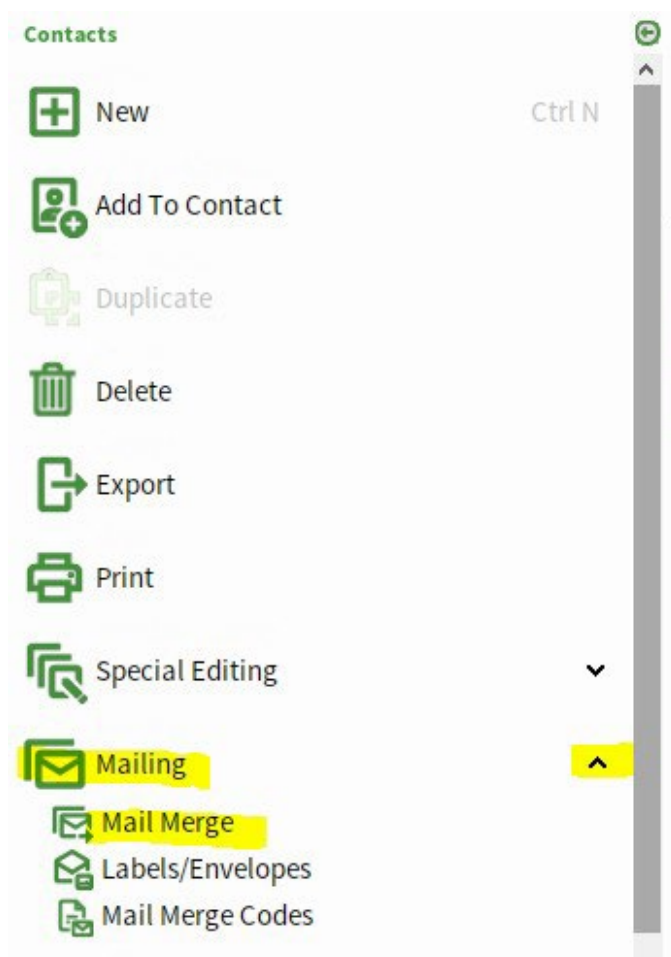
### **“EXTRA” Tab**

Some operating systems will not show the “Membership Status” section under the “Screening Tab” If this applies to your system, you can enter this information under the “Extra’ tab instead.

## **ID Card Printing**

Open the contact module and select the contact(s) for which you want to print ID cards.  
(to select more than one contact, simply hold “Ctrl” on your keyboard and select additional contacts.)

Click “Mailing” on the left hand side of your screen and click “Mail Merge”



A pop-up box will appear

- 1 – Select “Selected”
- 2 – Select “Run a different mail merge”
- 3 – Select “Choose the same template for every record”
- 4 – Click “Choose”, from the pop-up box select “All Templates”, in the drop down menu select “ID Card Front”, Click “OK”
- 5 – Make sure none of the boxes are checked and click “OK”

**Mail Merge Template Options**

---

**Contacts list**

1 Contacts to include in this mail merge

☐ All

☒ Selected

☐ IDs File

---

**Same As Last Time**

2 Do you want to run the same mail merge as the last time?

☐ Run the same mail merge ☒ Run a different mail merge

---

**Basic Approach**

3 How do you want to specify a template?

☒ Choose the same template for every record

☐ Use language specific templates

**By Language**

Choose which languages you want to use templates for (Note: all others will use default template)

☐ English ☐ French

---

**Choose Template**

4 Choose templates

Default

---

**Automatically filter out contacts**

5 Do you want to automatically filter out contacts marked as:

☐ Deceased ☐ Inactive ☐ Moved ☐ Do Not Mail

**Mail Merge Template Options**

☒ All Templates: ☐ Choose a file:

The 'Mail Merge Output Options' pop-up box will appear, click "Choose File" and check "After merging, open the merged output document".

**Mail Merge Output Options**

Multiple Files ▾

PDF Encryption ▾

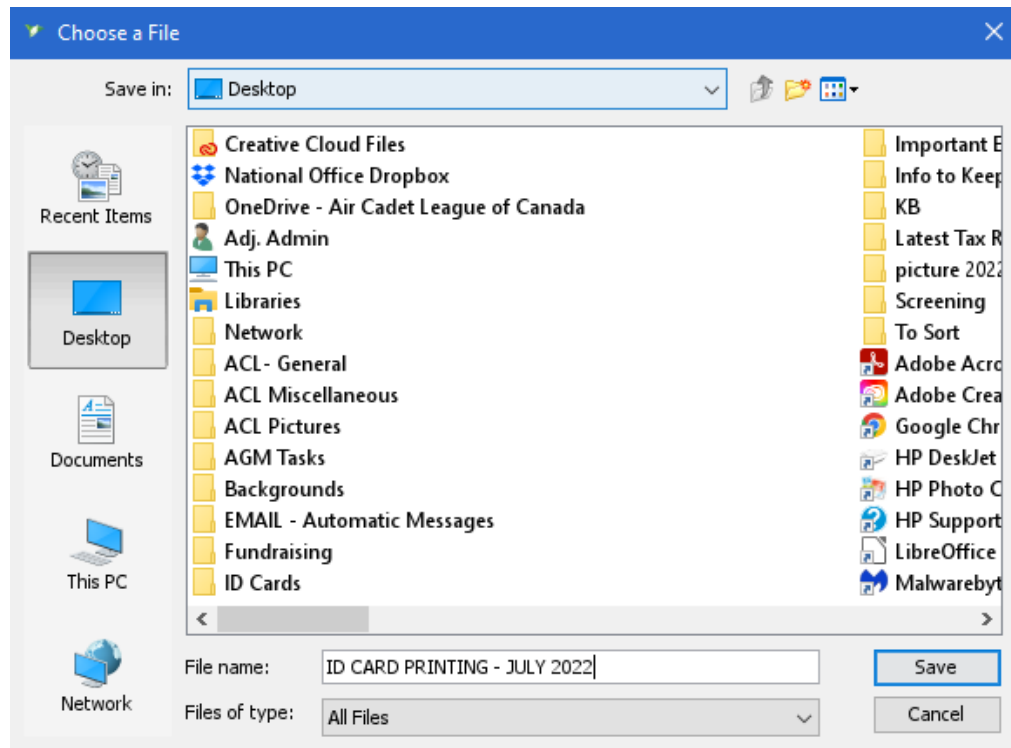
---

**Merge Output**

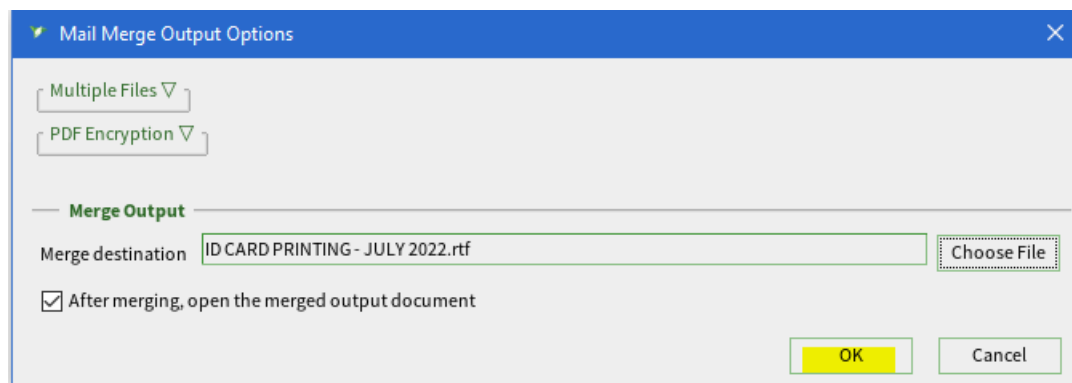
Merge destination

☒ After merging, open the merged output document

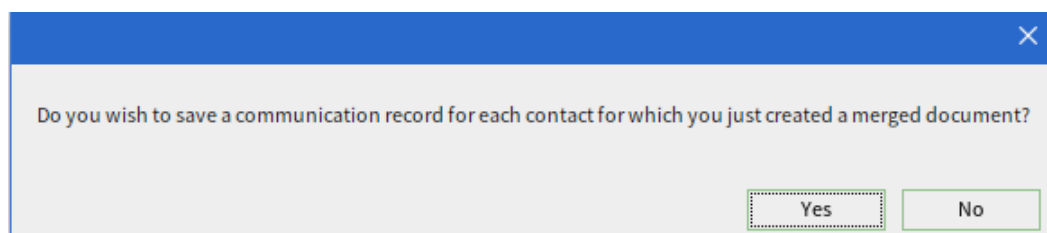
The “Choose a File” pop-up box will appear, this is you choose where to save the file and how to name the created file. (The system will automatically generate a name for the file, but you can change it and name it as you like.), Click “Save”



The name of the created file will appear in the “Merge destination” field, Click “OK”



The system will ask you if you wish to save a communication record? This is up to you. If you choose to save a communication record this will appear in the “history tab” of your contact.





A word document will open with the ID card(s).

From there you can click on the picture and play with the size of it if necessary.

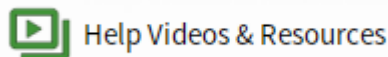
To play with the size of the picture, click on the picture, grey dots will appear around it, put your cursor on the grey dots, click and drag.

You can also align the name on the card by putting your cursor in front of the name, pressing the “back space” button on your keyboard, and tapping the “space bar” on your keyboard to slide it back over.

Once the card is to your liking, save and print. (Please note that an ID Card printer is required in order to print the cards. For information on where to purchase an ID card printer and blank cards, please communicate with the National office.)

#### NOTES:

1. Help Videos & Resources are available to you at all time through Sumac simply click on the bottom at the bottom and type in your question. Videos and step-by-step guides provided for your convenience.



Help Videos & Resources

2. This document is issued under the authority of the National office. If you have any questions or would like to submit any recommendations for amendments, please do not hesitate to communicate with Krystel at [leaguehq@aircadetleague.com](mailto:leaguehq@aircadetleague.com).