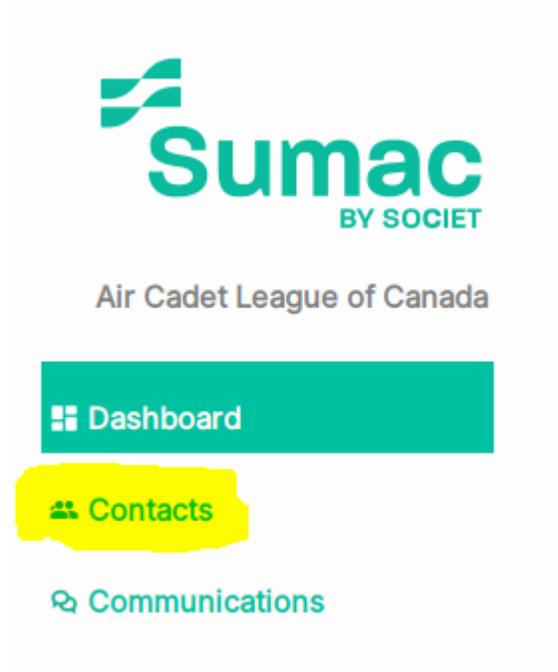


How – to (Sumac) - Search functions

How to search for all “Active” contacts only.

First you need to open your “Contacts” page.



Please remember that you may choose to simply add the “Inactive” column to your main menu.



By doing this, you can simply click on the “Inactive” column to bunch all inactive contacts together. This would allow you to search only in the active contacts as all inactive contacts would figure either at the top or bottom of your contact list.

The image shows a contact list in Sumac with the 'Inactive' column added. The 'Columns' button is highlighted in yellow. The list shows columns for 'Contact ID', 'First Name', 'Last Name', 'Segment Name', and 'Inactive'. The 'Inactive' column contains the word 'Yes' for all contacts, indicating they are inactive. The contacts are listed in descending order of their Contact ID.

^ Contact ID	^ First Name	^ Last Name	^ Segment Name	^ Inactive
22534	[REDACTED]	[REDACTED]	ALBERTA	Yes
25925	[REDACTED]	[REDACTED]	BRITISH COLUMBIA	Yes
20538	[REDACTED]	[REDACTED]	MANITOBA	Yes
23515	[REDACTED]	[REDACTED]	ONTARIO	Yes
22592	[REDACTED]	[REDACTED]	ALBERTA	Yes
18450	[REDACTED]	[REDACTED]	NOVA SCOTIA	Yes
23447	[REDACTED]	[REDACTED]	ONTARIO	Yes
18449	[REDACTED]	[REDACTED]	NOVA SCOTIA	Yes
18448	[REDACTED]	[REDACTED]	NOVA SCOTIA	Yes
24527	[REDACTED]	[REDACTED]	ONTARIO	Yes
18447	[REDACTED]	[REDACTED]	NOVA SCOTIA	Yes

Otherwise, you could conduct a “Search”.

Once you are in your “Contacts” page, you have the availability to make specific searches.

(such as search for all active contacts only, eliminating and “inactive” contacts from appearing in your search results.)

Contact Name

Advanced △

List Builder Search Builder

Search Type: Show All

General Control: Search all records. Show only matching ones.

Expansion ▽

In the “Search Type” box you see above, simply choose “Field” from the dropdown menu offered, you will see that a few more search boxes will appear.

In the second search box under search type, choose the option “Inactive” from the drop down menu.

Contact Name

Advanced △

List Builder Search Builder

Search Type: Field Inactive

General Control: Search all records. Show only matching ones.

Expansion ▽

If you wish to obtain the list of all inactive members, make sure the “Checkbox is set” option is chosen.

Contact Name

Advanced △

List Builder Search Builder

Search Type: Field Inactive

General Control: Search all records. Show only matching ones.

Expansion ▽

The list the system will generate for you, should no longer contain any “INACTIVE” members.

You may then resume your searches as usual in the information provided by the database below.

Now, please know that you not limited to only adding one search option to your search, you may add more than one search options to your search all at the same time.

To do so, simply click the + button provided

Contact Name Search

Advanced Δ

List Builder Search Builder

Search Type: Field Inactive Checkbox is set Checkbox is not set +

General Control: Search all records. Show only matching ones.

Load Save Search Clear Undo

Expansion ∇

By doing so, another search field line will appear for you where you can add more details to your search.

Now, let's say you want your system to bring up all of your active volunteers with an expired screening for example.

In this case you would add a secondary search option to your initial search as such.

Contact Name Search

Advanced Δ

List Builder Search Builder

Search Type: Field Inactive Checkbox is set Checkbox is not set and + -

Search Type: Field Screening Date is less than 2024-06-24 + -

General Control: Search all records. Show only matching ones.

Load Save Search Clear Undo

Expansion ∇

This will generate a list of all the contacts you have in your database with a screening date before the date requested.

You will notice that "deceased" contacts should still appear in your lists.

You have 2 options in this regard:

You can either checkmark both "deceased" and "inactive" for all of your deceased contacts, in order to no longer have them show up in your contacts.

Or you could simply add another "Search" option to your search field, removing all deceased contacts from your search.

Contact Name

Advanced △

List Builder Search Builder

Search Type: Field Inactive Checkbox is set Checkbox is not set and + -

Search Type: Field Screening Date is less than 2024-06-24 and not + -

Search Type: Field Deceased Checkbox is set Checkbox is not set + -

General Control: Search all records. Show only matching ones.

Expansion ▽

You could also choose to create a search for screening expiry between such and such dates.

Contact Name

Advanced △

List Builder Search Builder

Search Type: Field Inactive Checkbox is set Checkbox is not set and + -

Search Type: Field Screening Date is less than 2024-06-01 and + -

Search Type: Field Screening Date is greater than 2024-03-01 + -

General Control: Search all records. Show only matching ones.

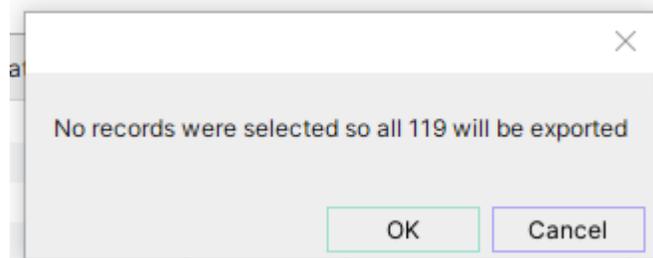
Expansion ▽

Once the system generates the list you are looking for, you may choose to simply export the information provided. This would permit you to work on/from the list it created and/or could provide you with the opportunity to hand this list out to someone else in your some (perhaps someone that does not have access to sumac) to follow up on expired screenings or upcoming screening expries)

To export a search result list, you will need to click on the “Export” button on the left of your screen.

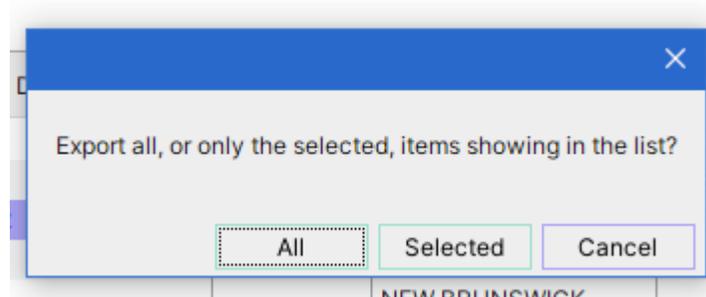


Once you click on the “export” button, the system will ask you (by pop-up) if you want to export all of the contacts in the list or not.



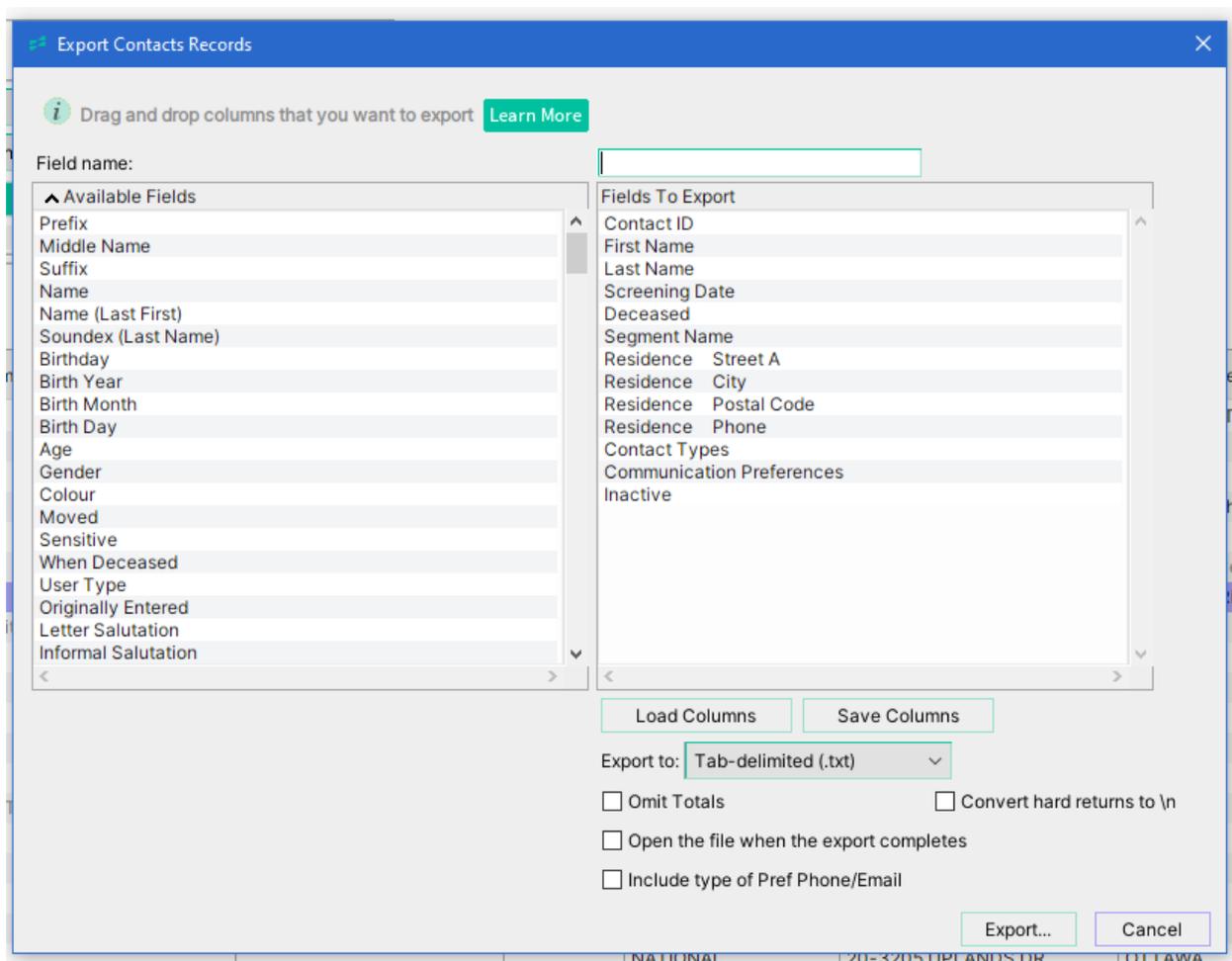
If you wish to select only certain contacts in your list, click “cancel” and select the contacts required. (Ctrl + Click)

Once all of the required contacts have been selected, click on “export”. A pop-up box will once again appear, asking if you want to only export the selected contacts or if you instead would like to export all of the contacts generated from your search.



Choose, “Selected” if you wish to only export the selected contacts, or choose “All” if you wish to export all of the contacts your search provided.

Once you’ve made your choice, a new pop-up box will appear, where you will need to confirm what information you wish to export from these contacts.



Simply click and drag from the left to the right, which information field you would like to export.

Please note that the system will automatically enter the fields listed in your main search page.

Please also note, that by adding new fields to your export request, this will not change any of the fields in your “main” page; it will simply add or remove the required fields to your export file.

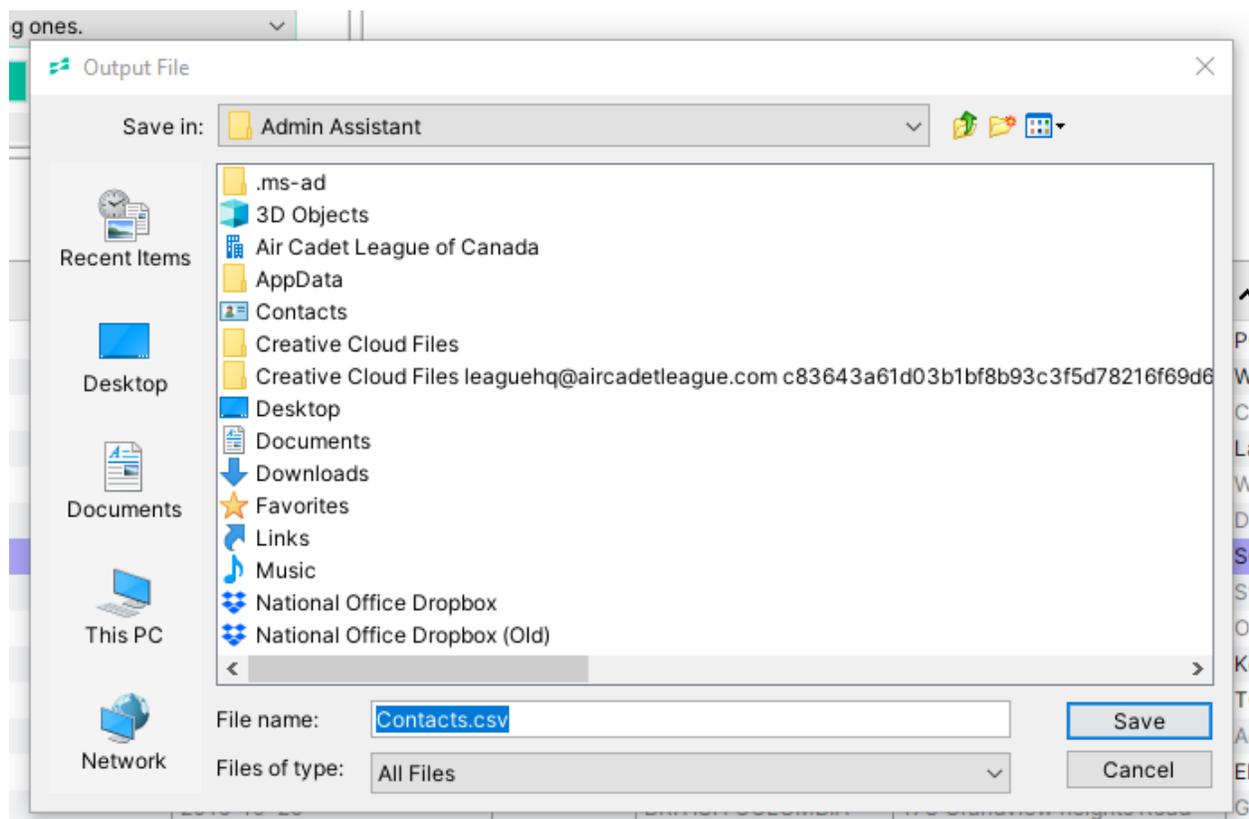
Once you have confirmed what information you want to export, change the “Export to:” section to “Comma-separated (csv.)”, this will allow the file to properly place everything in an excel spreadsheet.

You may also want to checkmark the “Omit Totals” box, as this would mainly be used to calculate donations or payments received, and is not needed in this case.

You may also checkmark the “Open the file when the export completes” option, this will simply open up the file for you once you’ve chosen the location of where you want to save it on your system.

Please note that it may take a minute or two for the system to export the information.

Once the system has created the export file, an “output file” pop-up will appear.



This will give you the opportunity to change the name of the file in question and choose its storage location on your system.

You will see this pop-up box at the bottom right corner of your screen once the export is completed.

If you checkmarked “Open the file when the export completes”, the file should open on its own afterwards.

If you did not, you will have to go find it in your system and open it from there.

AS PREVIOUSLY DISCUSSED, THE SYSTEM ALSO HAS THE CAPACITY TO SEND REMINDER EMAILS DIRECTLY FROM SUMAC. IF THIS IS SOMETHING YOUR OFFICE WOULD LIKE TO USE, PLEASE LET NATIONAL KNOW SO WE WILL NEED TO ASSIST YOU IN THE SET UP OF THIS OPTION.

(For example, the National office has created a gmail account (communications.aircadetleague@gmail.com), which is used by Sumac for all of the mailouts we do through Sumac.)

IF YOU HAVE ANY QUESTIONS, CONCERNS, COMMENTS, PLEASE COMMUNICATE WITH KRYSTEL AT

screening-admin@aircadetleague.com