

# Roots



Every installation of Sumac includes these modules – the requisite foundation on which to build your system.

<b>Campaigns</b>	group contacts and produce tightly focused communications	2
<b>Case Management</b>	record and track the delivery of services	3
<b>Communications</b>	streamline and monitor all interactions with your community	4
<b>Contacts</b>	record and analyze all demographic details about constituents	5
<b>Donations</b>	process, track, receipt, and analyze donations	6
<b>Email</b>	generate and send personalized messages, newsletters, receipts	7
<b>Events</b>	record and manage event-related information	8
<b>Grow Your Own</b>	define a custom module, integrate it with the rest of Sumac	9
<b>Internet</b>	use the Internet to interact with all your constituents	10
<b>Payment Processing</b>	process credit card payments instantly	11
<b>Reports</b>	analyze data and produce information from detailed queries	12
<b>Time Tracking</b>	track, record and analyze time spent on projects	13



# Campaigns



## Overview

Non-profit organizations raise funds from an eclectic populace and provide mission-based services to an equally diverse group. Applying the same communication strategy to every demographic will not be as effective as an approach that focuses on the unique preferences of the individuals, families and organizations with which your non-profit associates.

Sumac Campaigns enables you to analyze and sort your contacts into more manageable segments, providing the ability to craft a more persuasive, personalized package that increases the effectiveness of your fundraising drive while improving staff efficiency when delivering the mission of your organization to the community.

## Features

- ◆ Specify which contacts should be included and which should be excluded from a campaign using built-in searching tools.
- ◆ Segment constituents into groups of potential donors, soliciting each group with a customized package of materials.
- ◆ Generate and track communications automatically.
- ◆ Identify revenue targets for campaigns.
- ◆ Assign staff to work on a particular campaign.
- ◆ Assign source codes to each package so that responses can be accurately tracked and recorded.
- ◆ Use reports to analyze the outcome of a campaign.
- ◆ Correlate donations, pledges and communications with campaigns for in-depth analysis.



# Case Management



## Overview

Social service agencies providing programs in the community gather detailed information to form client profiles that help render assistance to those in need. Managing the data involved is a top priority to ensure the right people are receiving the correct services. Client information requires tracking and organizations need to record and report services delivered.

Sumac Case Management enables recording and tracking of service delivery information with ease. Built-in tools provide analysis for your operations, reporting for purposes of internal use and for external reporting to governments and other funding bodies, allowing your staff to focus on delivering your mandate and raising more funds.

## Features

- ◆ Customize constituent profiles to gather accurate information about each client.
- ◆ Manage client intake, recording information as required.
- ◆ Specify data access privileges to provide security for sensitive information, preventing client workers from viewing donation information and fundraising staff from viewing private client information.
- ◆ Record and organize different types of communications with clients.
- ◆ Produce statistical reports based on service delivery, client demographics, and client needs.
- ◆ Integrate with Sumac Reminders to identify client needs and build action plans for services appropriate to each client.
- ◆ Integrate with Sumac Time Tracking to monitor time spent on providing service, linking each client to employees or volunteers.



# Communications



## Overview

Whether by mail, telephone, email or in-person, communicating with individuals, families and organizations forms the backbone of relationships between non-profit organizations and the community. Expressing the details of your mission and methods to every single contact is vital to maintain a steady financial base while spreading the positive influence of your organization.

Sumac Communications streamlines all the diverse interactions with your community, organizing them into useful, searchable information. Increase the productivity of your fundraising campaigns with an in-depth analysis of all your communications, providing your staff with a focused, adaptable message that is tailored to help them achieve enhanced donor stewardship and better visibility in the community.

## Features

- ◆ Record all the details of outgoing and incoming interactions between your organization and contacts.
- ◆ Measure the impact of communications and their effectiveness for the goals of your campaigns and events.
- ◆ Generate communication-related information and statistics, tracking email, mail merges, labels and campaigns using automated tools.
- ◆ Create mail that conforms to post office standards for greatly reduced postage costs.
- ◆ Record communications for an entire list of contacts (e.g. people who attended an event) with a couple of clicks.
- ◆ Relate interactions to multiple contacts, events and campaigns, enabling detailed analysis of communications.
- ◆ Restrict access to sensitive communications, ensuring confidential information remains secure.
- ◆ Record a picture of contacts, promoting facial recognition of VIPs during campaigns and events.
- ◆ Integrate with Sumac Reminders to automatically record and track detailed action plans.



# Contacts



## Overview

The individuals, families and organizations that form the community of contacts with which you interact are as unique as the specialized mission of your non-profit organization. The ability to catalog limitless demographic information such as addresses, preferences, facts and traits provides the basis for an in-depth understanding of both individuals and the community as a whole.

Sumac Contacts is at the heart of Sumac's superior functionality, providing a completely customizable solution for rapidly recording and analyzing all the important details about contacts involved with your organization. A greater information base provides your staff with the knowledge necessary to raise more funds with a focused approach, as well as easier facilitation of your mission that benefits the community.

## Features

- ◆ Record detailed demographic information, communication preferences and multiple home, business and vacation addresses in a contact record for each constituent in your community.
- ◆ Record relationships between contacts to better understand the social network of any constituent, including business, family and casual relations.
- ◆ Supplement contact profiles with external documents in any format, such as resumes and websites.
- ◆ Document supplementary facts about education, club memberships, employment history, program interests, assets, external donations, planned gifts, qualifications, volunteer availability and preferences.
- ◆ Extend the data stored in contact records automatically, including additional, relevant information about the contact for other Sumac modules such as Sumac Fund Requests and Sumac Memberships.
- ◆ Link contact records with every module in Sumac, providing a complete description of your relationship with an individual constituent or your community as a whole.



# Donations



## Overview

Fundraising is a critical part of non-profit organizations. The reduction of government support increases the number of organizations striving for finite funds. Competition for every available dollar demands the most efficient approach from your fundraising team.

Donations of all kinds are easily processed, tracked and receipted by Sumac, so you can spend more time developing greater rapport with current and potential donors. Streamlined operations are supported by numerous built-in reports that help strategize for your next funding campaign through an in-depth analysis of your financial profile, fostering loyal donor stewardship.

## Features

- ◆ Record all donations, including bequests, gifts-in-kind, in memoriam, member donations, split donations, event and campaign related donations.
- ◆ Provide soft credit for donations to contacts other than the donor.
- ◆ Document payment details for each donation and specify alternative recognition scenarios if necessary.
- ◆ Relate donations to events, campaigns, and funds, providing a more detailed analysis of giving patterns.
- ◆ Export data from Sumac to your accounting software, eliminating repetitive entry.
- ◆ Produce receipts on an ongoing basis or annually, in accordance with donor preferences.
- ◆ Prepare reports for financial reconciliation, for analysis (e.g. lapsed and returning donors, LYBUNT, SYBUNT), and to identify trend times (e.g. 2, 3 and 10 year comparisons).
- ◆ Generate and assign receipt numbers automatically with the option to attach customized thank-you letters.
- ◆ Integrate Sumac Membership, Sumac Sales and Sumac Ticketing modules to automatically solicit and record donations in conjunction with other transactions.
- ◆ Integrate donations with online payment processing to instantly process and authorize credit card payments.
- ◆ Extend Sumac Donations to integrate with Sumac Pledges, automatically creating recurring gifts while relating donations to pledges.
- ◆ Link Sumac Prospecting with donations and analyze donation histories and trends in order to find great candidates for increased giving.



# Email



## Overview

Persuasive communication generates momentum for all non-profits striving for better interaction with diverse individuals, families, and organizations that form the community. Excellent email campaigns promote greater visibility and mutual understanding, increasing fundraising success while delivering mission-based functions to the community with greater impact.

Sumac Email provides your staff with customizable tools dedicated to maintaining and increasing exposure while avoiding the cost and of direct mail campaigns. Automated processes and thoughtful design combine to prevent all the potential mishaps involved in email blasts, ensuring that each personalized message reaches its specific target, elevating the effectiveness of your organization's communications.

## Features

- ◆ Send email directly from individual or group contacts, campaigns, memberships and job openings through an integrated email program.
- ◆ Register detailed communication data automatically for each email, including date and recipient.
- ◆ Build a complete view of relationships between your organization and individual prospects, donors and segments of your community.
- ◆ Tailor your communications strategy with precision and track who should and should not receive a particular newsletter, bulletin or invitation.
- ◆ Organize fundraising, advocacy campaigns, membership drives and other events with *personalized* newsletters, bulletins and invitations, increasing rates of response and participation.
- ◆ Identify incomplete deliveries with a report log that identifies problematic emails.
- ◆ Guarantee that everyone gets the message – Sumac sends each message individually to make sure that your email is not targeted as spam.



# Events



## Overview

Many non-profit organizations present artistic and sporting events, dinners, press conferences or other special events that draw attention to their organization's mandate while increasing overall fundraising. Tracking the entire process from planning and sending invites to attendance and participation enables you to analyze the impact of an event as well as refine your approach for future considerations.

Sumac Events integrates closely with other modules in Sumac to ensure that all event-related information is recorded and managed appropriately. Built-in tools provide full searching and reporting capabilities while automated processes record vital information to give your organization an easy-to-use solution for all your upcoming events.

## Features

- ◆ Distribute custom invitations for events via Sumac Email or direct mail.
- ◆ Document all responses to invitations, producing an expected attendance list.
- ◆ Print name tags, placeholders and other identification for expected attendees.
- ◆ Track actual attendance, and compare it with previous invitations and responses.
- ◆ Record a venue, time, and other detailed descriptive information for every event.
- ◆ Flag inactive or historical events to enhance data entry speed and accuracy.
- ◆ Identify pledges, communications, and donations that result from a successful event.
- ◆ Integrate with Sumac Ticketing to record information such as seating plans, ticket pricing and other data while selling and printing customized tickets.



# Grow Your Own



## Overview

Sumac is extensively customizable and each module provides numerous configuration options, as well as standard client-specific lists. But what if the specialized module you want is not available? The ability to build your own module is a standard part of Sumac Roots, raising customization to the next level by defining completely new types of data objects to be stored and processed using Sumac.

The Grow-Your-Own module has the same functionality as regular Sumac modules: exporting and importing, searching, mail merge, printing, sorting, linking to contacts and the use of configurable lookup lists. As with everything else in Sumac, ease of use is paramount. The entire process of defining a new data object in Sumac and integrating it with the user interface and other associated data takes a few minutes, eliminating the need to hire expensive programming experts, placing control of the software in your hands.

## Features

- ◆ Determine the name of the new data objects entered into the Sumac database.
- ◆ Define with precision the fields you need in new data objects and the fields derived from pre-configured lists of choices.
- ◆ Indicate which fields in the new data objects are mandatory and which are optional.
- ◆ Define what type of data is permissible in each field (e.g. whether an entry should be numerical, text-based or a date).
- ◆ Instruct Sumac to know which fields should appear in the search area at the top of the list window.
- ◆ Generate your own *ad hoc* reports based on standard selection, sorting, exporting and printing capabilities.
- ◆ Integrate with both Sumac Roots and optional modules to link your custom modules with standard searching, reports, email and other functionality.



# Internet



## Overview

For many non-profit organizations, the Internet provides an opportunity to spread their message to a broader audience, providing greater access to beneficial services distributed throughout the community. The ability to effectively manipulate this powerful medium can lead to increased donor stewardship and the delivery of better services.

Sumac Internet provides the bridge needed to connect your database to the Internet, allowing your organization to take advantage of the dynamic possibilities offered by online functionality. From online donations and email newsletters to custom websites and data capturing, Sumac assists your staff with the implementation and maintenance of a streamlined solution for your Internet database requirements.

## Features

- ◆ Gather data from your website and other online sources. Accumulate and manage the information in Sumac.
- ◆ Collect donation information online using secure, online functionality.
- ◆ Distribute newsletters, messages, updates and other communications via email.
- ◆ Use mail merges to generate pdf (Acrobat) invoices, receipts and other documents for electronic delivery.
- ◆ Accumulate data from online surveys to gauge the reaction of constituents towards your organization.
- ◆ Perform auctions that provide dynamic updates for your staff.
- ◆ Integrate Sumac with other website functionalities through importing and exporting functions that also clean the data provided.
- ◆ Deliver automatically generated membership directory information via your website or email.

*Sumac provides custom online database and website development on a quotation basis.*



# Payment Processing



## Overview

The ability to give prospective donors choice of payment method provides necessary options for potential contributors to give comfortably, easing the donation process. Superb payment processing helps prepare the additional paperwork and authorizations required to fulfill the demands of donors.

Sumac Payment Processing eliminates repetitive, time-consuming chores involved in financial transactions including donations, pledges, funders, ticket sales, retail sales and memberships. Efficient credit card processing reduces time spent on authorization, allowing staff to focus on fundraising and accomplishing the mission of your organization.

## Features

- ◆ Define your organization's connection to a payment processor and identify the types of credit cards you accept.
- ◆ Process credit card payments instantaneously over the Internet.
- ◆ Accept donations and payments for memberships, tickets and other sales of products or services.
- ◆ Process recurring pledge payments in seconds, without re-entering credit card information every month.
- ◆ Generate automated payment records that describe and track transactions.
- ◆ Process payments while receiving an order over the phone.
- ◆ Eliminate extra terminals and communication lines used for credit card authorization.
- ◆ Secure vulnerable financial information with restricted access to sensitive data.
- ◆ Automatically receive an assigned authorization code for each transaction and save it with the payment record.



# Reports



## Overview

Accurate, detailed reporting is needed to support the fundraising and mission-based operations of non-profit organizations, demanding superb information technology to rapidly produce results. Diverse information must be stored and organized to create a strong, thorough database.

Sumac Reports automatically sorts through mounds of information, quickly replying to vital queries and supporting your staff with the quality and quantity of data needed to perform in-depth analysis of fundraising and mission based activities in your community. We take pride in the fact that Sumac provides the fastest, most functional software available to non-profits. If your organization requires a report unavailable in Sumac, we will create that report for you, free of charge, reflecting our sincere commitment to your organization.

## Features

- ◆ Generate reports rapidly with a couple of clicks. Choose a report and it appears in a few seconds.
- ◆ Print the details of a report or preview the results on-screen.
- ◆ Save your reports in a file that can be opened with other programs (e.g. spreadsheets) for further presentation or analysis.
- ◆ Create *ad hoc* reports with searching, sorting and field selection from every Sumac module.
- ◆ Specify additional details involving time periods, data inclusion and information organization with configurable reports that order Sumac to produce precise results.
- ◆ Specialized reports allow you to specify customized data groupings. For example, if you produce a donor roll grouped by giving level, you can specify your particular levels of giving.



# Time Tracking



## Overview

How much work does your organization do? The effort of employees in forwarding your mission is one way to measure this. The efforts expended by volunteers are a large additional component of the work of non-profit organizations.

Sumac provides tools for tracking, recording, and analyzing time spent on projects. This enables effective business analysis of your organization's staff utilization, and also supports proper recognition to ensure that volunteers never feel unappreciated.

## Features

- ◆ Record the amount of time, when it was spent and who did the work.
- ◆ Record both the program and the client for whom the work was performed, enabling secondary project-level analysis.
- ◆ Produce reports to show the effort expended by staff or volunteers working on any projects in any time period.
- ◆ Integrate with Sumac Volunteers to record time spent by volunteer workers.

