

Contacts Window Overview

<i>Speech</i>	<i>Cursor Actions</i>
To open the Contact List, click the Contacts button in the Sumac console.	Show Console. Click Contacts.
That opens a list of all the contacts in your database.	Point to list of contacts.
A contact might be a donor, a volunteer or staff member. It could be an organization or a household. In fact, a contact could be several of those things. The Contact List keeps track of all your contacts and stores all the information you have about each of them.	Show slide.
Additional and related information – like a communications, donations, or a membership records for example – are stored in separate records that are linked to the contact record.	Show slide.
You can expand any contact to see any related information by clicking the expansion triangle at the start of every line.	Click arrow to expand a contact.
That shows you related information that has been recorded for that contact.	Point to related information
You can choose what to show when you expand a contact within the expansion menu above the contact list.	Expand Expansion menu.
In the What To Show drop-down menu, any type of record with a check mark next to it will appear when you expand a contact.	Expand What to Show drop-down-menu. Point to check marks.
Click to un-check any of these types of records to customize what information shows when you expand a contact.	Uncheck Communications.
This allows you to hide any information you do not wish to see when you expand your contacts.	Click to collapse contact. Click to expand contact again.
You can also choose to expand chronologically by turning on this checkbox. Usually, when you expand a contact, the related information that appears is grouped based on record type. So all communications are listed together, as are donations, memberships, and so forth. However, you might want to have these appear in chronological order to get a better idea of when and how you interacted with a contact over time.	Point to Expand Chronologically
Turn on Expand Chronologically.	Click Expand Chronologically.
And now when you expand a contact, the records appear in reverse chronological order, regardless of the type of record.	Click to collapse contact. Highlight list.
Many features of the Contact List are the same as every other list in Sumac.	Click to expand contact again.

Searching features are always at the top, and the search criteria that are available vary depending on the list you're searching in.	Point to Search Features. Expand Search Type drop down menu.
For example, perhaps you want to find a list of all your board members. Choose a Search Type of Contact Type, and a Contact Type of Board.	Choose Search Type: Contact Type. Choose Contact Type: Board.
Click Search, and Sumac shows the resulting data records in the list.	Click Search. Click OK. Point to list of data.
Buttons are along the left side.	Point/scroll through buttons along the left.
and the information bar is at the bottom. The information bar shows you how many records are visible in a list, and how many are actually selected.	Point to information bar.
Also, if you tell Sumac to perform an operation that might take a long time, the information bar shows your progress by running a small thermometer along the bottom of your list to let you know how much longer you have to wait.	Move mouse across the bottom of the window.
Choose which columns are on displayed by expanding Settings, and clicking Column Choices. By the way, there is a shortcut to get this list of column choices -	Expand Settings. Click Column Choices.
click the columns icon on the right hand side of the titles bar.	Point to column choices icon.
That opens a window with all the fields that are available to show on the left, and the fields that are currently showing on the right.	Point to left side. Point to right side.
Drag and drop these fields from left to right to add a column to your list.	Drag left to right.
Drag, from right to left to remove columns.	Drag right to left.
Drag up and down to change the order of the columns.	Drag to re-order columns.
Click OK...	Click OK.
and Sumac arranges your columns as specified. Column preferences are remembered for every user, so the next time you open your Contact List, the same columns appear.	Point to new columns.
You can sort a list by clicking the title of the column you want to sort by.	
For example, perhaps I want to sort this list by the last name of all my contacts. Click Last Name...	Click Last Name column.
and Sumac sorts the list in ascending order.	Point to ascending order.
If I click the column again, Sumac sorts in descending order.	Click Last Name column again. Point to descending order.
Notice there is a small triangle in the column title to indicate which way the list has been sorted.	Point to blue triangle in Last Name column title.

You can sort this way in any list window in Sumac.	
By the way, if you click to sort a column, and two entries in the column are the same, then Sumac sorts them by the column you previously used for sorting.	
So if you sort first by city, then by state or province, your contacts will be sorted by state but within each state they will be sorted by city.	Click to sort by city. Click to sort by State. Point to both columns.
Sumac also lets you search in a sorted column by typing what you want to find.	
Perhaps I have all contacts showing in the list, and I want to scroll through the list and find a contact named John Smith.	Choose Search Type “All Contacts.” Click Search.
To do this, I can click to sort the list by the last name column.	Click to sort by last name.
And then type S-M-I into my keyboard, and Sumac scrolls through the list to find the first contact whose last name starts with those letters.	Type S-M-I. Point to John Smith.
To open a record and view its details, double-click it.	Double-click a contact to open their record.
<i>Check out more training videos to learn more about Sumac.</i>	