Create New Communication Record

Script	Cursor Movements
Communication records let you to track any interactions with your contacts.	
Sumac can automatically create communication records for you when you generate mailing labels, send email, and do mail merge operations.	Show slide.
But if you want to manually create communication records, there are two main ways: Click New in the Communications list, or click Add To Contact in the Contacts list.	Show slide.
In the Communications list,	Show Console. Click Communications.
click New to open a new communication record where you can record the details of your communication.	Click New. Show communication record.
When you click OK, it is added to the database.	Point to OK. Click Cancel. Close Communications list.
It is often more convenient to create new communication records from the Contact list.	Show Console. Click Contacts.
Select the contact with whom the communication occurred.	Select Max Ernst.
Selecting a single contact activates the Add to Contact button. This button allows you to add new records of any type, connecting them to the selected contact.	Highlight Add To Contact button.
Click Add to Contact, and Communication to open a new communication record.	Click Add to Contact. Click Communication.
Notice that Sumac automatically filled in the contact's name and the current date.	Point to Contact field. Point to Date field.
Now you can fill in all the details of this communication. Regardless of where you create the new communication record, the information is always recorded the same way.	
Every communication record must have a Contact, Communication Type, and a Date. Choose the appropriate communication type to specify what kind of interaction you had with this contact.	Point to Contact. Point to Communication Type. Point to Date.
For this example, let's say we just had a phone call with Max.	Choose "Telephone" from Communication Type drop-down.
You can associate communication records with an event, which makes it really easy to track event attendance, for example.	Point to Event.

Or if you're sending out solicitation letters, you can also associate communication records with a campaign. Associating the communication records with that campaign makes it easier for you to compare which contacts received solicitation letters, and which contacts made donations as a result.	Point to Campaign.
If necessary, indicate the source of the communication to record how the contact came to reach out to you, or vice versa.	Point to Source.
The date is always set to today, but you can override that if you need to by typing a different date, or clicking the calendar icon.	Point to Date. Enter Date. Click calendar icon.
That opens a small calendar window. You can move back and forth one, three, or twelve months.	Show calendar window. Highlight arrows on each side. Click arrow back 3 months.
There are also special buttons to enter yesterday, today, or tomorrow.	Highlight Yesterday, Today, Tomorrow buttons.
For example, if we spoke with Max yesterday, click Yesterday.	Click Yesterday.
Include any necessary notes about the communication record. You can summarize a phone discussion, or if the communication being recorded was an email, you can copy the body of the email and paste it into the notes field to save a complete record of the email.	Point to Notes field.
You can also attach a file to a communication record. So if, for example, the communication related to a particular document, attach that document to the communication and you can open that file if you ever need to in the future.	Point to Attached File.
If you're recording sensitive, confidential information in this communication record, you may want to turn on the Sensitive checkbox to ensure that only users with the ability to see sensitive data will have access to this communication record. This is especially useful when recording case notes, or other confidential client-related information.	Point to Sensitive.
Click OK to save the communication record in your database.	Click OK.
Now that the communication record has been saved, you can easily access it by expanding on the contact to see related information.	Expand on Max Ernst. Point to new Communication.
You could also access this communication record on the History tab of this contact's record, or by searching in the Communications List.	
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