Customize Your Database

Speech	*Cursor Actions*
In the Sumac console, under Utilities, there is a Customize Database menu.	Show Console. Expand Utilities. Expand Customize Database.
This menu allows you to customize your Sumac database. You must be a Sumac Administrator in order to use any of these tools.	Point to Customize Database.
Lookup Lists are customizable fields that you'll see in every list of Sumac.	Point to Lookup Lists.
They appear in the form of drop-down menus, like cities, or as groups of checkboxes, like contact types. Lookup Lists also allow you to create additional fields in contact records.	Show slide.
Offices is for recording information about your organization's offices,	Point to Offices.
which can then be used to put information – like your website, address, or charitable registration number – into mail merge documents. The address of the office can also be used to remove countries from mailing labels. Office records also define the servers that Sumac should use to send bulk email in each office location.	Show slide.
Notifiers let you specify email notifications that should be sent to certain people at your organization.	Point to Notifiers.
For example, perhaps your book keeper wants to be notified any time someone makes a donation over $500. Or perhaps your Director wants to be notified any time a board member's contact record has been edited. A Notifier can tell Sumac to send them an email in those situations.	Show slide.
Preferences lets you customize many aspects of your database.	Point to Preferences.
For example, perhaps you want to specify that account codes should be mandatory in donation records, or turn off the Vacation Address tab in contact records so that it does not appear. Preferences also lets you define how Sumac should integrate with your website.	Show slide.
Grow-Your-Own lets you build an entirely custom module for your organization.	Point to Grow-Your-Own.

Perhaps your organization rents out some meeting rooms in your office, and you want to record that information in Sumac. Or perhaps you want to build a custom module for recording case records or program information. In just a few minutes, you can build a custom module to record information that is unique to your organization.	Show slide.
A Schema is a hierarchical scheme for classifying records.	Point to Schema Entries.
Schemas can be used in Grow-Your-Own records. As an example, if you were classifying diseases, you might have a top level that included circulatory diseases, respiratory diseases, and digestive diseases. Then more specific ailments would be listed under each. Schemas can also be used in museum collection objects. One common schema used in museums is Nomenclature 3.0. So at the top level you would have buildings, furnishings, and tools. Under furnishings comes bedding, furniture, and floor coverings.	Show slide.
Check out more training videos to learn more about Sumac.	