Donation Preferences

Speech	Cursor Actions
Sumac allows you to customize your donation preferences specifically for your organization.	
The Sumac administrator in your organization only needs to set up donation preferences once, and then your entire organization is ready to go!	Show Console.
Log in as a Sumac Administrator. Click Utilities, Customize Database, and Preferences.	Expand Utilities. Expand Customize Database. Click Preferences.
Then choose the Donations tab.	Choose Donations tab.
If your organization does not use donations at all, then you can completely turn off the donation management features of Sumac by clicking this check box.	Point to 1st checkbox.
This check box enables donation batches. Batches group donations together, and automatically calculate the total of the donations in the batch. This is particularly helpful for managing periodic bank deposits. Batch reports can be included with a bank deposit to produce a paper record of cheques received and deposited.	Point to 2nd checkbox.
Donation Types are the only mandatory classification field in donation records, so you should normally always enter them. However, in some unusual circumstances, where your usage of Sumac means that other fields provide all required classification information, you can make donation types optional.	Point to 3rd checkbox.
If necessary, you can specify that the Donor Recognition field should always be set. If you put a check mark here, Sumac will automatically fill in the Donor Recognition field with the Donor's name. However, this is usually not necessary	Point to "Should Donor Recognition field always be set?"
Sumac can auto-fill the Payment Type from the last-saved donation record. If your organization almost always receives donations from the same type of payment – for example, almost all the donations you receive come from cheques – putting a check mark here can help you save time while entering donations.	Point to "Should Sumac set the Payment Type..."
Sumac can auto-fill the Received Date from the last-saved donation record. If your organization enters a high volume of donations each day, putting a check mark here can help you save time while entering donations, as Sumac can fill in the Received Date for you based on the last donation you entered.	Point to "Should Sumac set the Received Date...."
If your organization does not generate tax receipts for donations under a certain amount, enter the amount here. For example, perhaps you only create receipts for donations over $5, so enter $5.	In "Set 'will never be receipted' for donations less than:", enter "$5"

This preference causes Sumac to warn users when they are entering a donation from a household member. If your organization has a policy that donations should normally be recorded against the household instead of against individual household members, this preference helps to enforce that policy.	Point to "Are Donations from household members allowed"
You can also tell Sumac to create a payment record for each donation, which makes reporting total transactions easier. When this check box is turned on, whenever you enter a donation, you are automatically prompted to complete a payment record. Alternatively, you can specify that Sumac should only do this for donations made via credit cards. If you are using Sumac for payment processing, a payment record can be used to automatically clear a credit card transaction, and remembers additional details like credit card number and authorization code.	Point to "Payments for Donations" Point to "Only for Credit Cards"
You can also decide to make "zero" donations acceptable in your Sumac installation. This allows you to track in-kind donations that have no transferable monetary value.	Point to "Zero donations"
This checkbox lets you decide that account codes are required and mandatory in donation records. Account Codes are usually optional in donation records. However, you may want to make them mandatory to ensure that all donations show up in Sumac's accounting reports.	Point to "Require Account Codes..."
This check box makes Funds mandatory in Donation records.	Point to "Require funds in donation records"
You can tell Sumac that if a donation has been marked as reconciled, it should lock financially-significant information to prevent it from being changed.	Point to "Should reconciled donations be locked?"
When entering a donation, Sumac can automatically enter a Recognition contact based on the In Honor contact. For example, often all donations in honor of a particular contact are supposed to have a recognition letter sent to a particular family member of the in-honor contact. In this situation, create a "receives recognition" relationship and relate the in-honor contact to the recognition contact with this relationship. Use this preference to tell Sumac the relationship to be used for this purpose. Then, whenever a donation is in honor of someone, Sumac can set the Recognition contact based on the relationship.	Choose "receives recognition" from drop-down menu.
This drop-down menu works similarly to the recognition for in-honor contacts, but it tells Sumac how to automatically find a soft-credit contact based on the donor. If a particular contact, perhaps a board member, is supposed to receive a soft credit for donations from a particular donor, then relate the board member and donor with a "receives soft credit for" relationship.	Choose "receives soft credit for" from drop-down menu.

If your organization accepts matching gifts, this drop-down menu works similarly to the recognition for in-honor and Soft Credit contacts, but it tells Sumac how to automatically find a Matching Donor contact based on the donor.	Point to "Matching Donor" drop-down menu
When you use Sumac to accept donations or pledges online, it automatically sends an email to donors to confirm that their donations went through successfully. However you can customize the email that is sent. You can specify the sender name and email address for the confirmation emails, and also tell Sumac which template to use to respond to an online donation or pledge.	Point to fields under Online Transaction Server.
You can even specify an email address that should be BCC'd on donation or pledge email confirmations sent.	Point to "BCC email address field"
You can also choose the donation type that Sumac should use when recording donations that have been made through your website.	Choose Donation Type "Online."
If your organization uses contact segments, and receipts should be numbered based on the contact segment of the donor, put a check mark here. Otherwise, leave this blank.	Point to "Are donation receipts numbered by contact segment"
Check out more training videos to learn more about Sumac.	