

Explore Communications

<i>Script</i>	<i>Cursor Movements</i>
In the communications window under Analyze & Report is the Explore button.	Show Console. Click Communications. Expand Analyze & Report.
This button allows you to set up multiple searches and compare the results.	Hover over Explore.
For example let's say you want to see everyone solicited in your last campaign, who attended an event that was part of that campaign and who donated as a result. The first step is to define your search criteria.	Click Explore.
To do this, click New.	Click New.
Name your search (we'll name the first one "solicited"). The next step is to define the communications to be found.	Enter "solicited" into Name field.
You can define the search by date range, campaigns, communication types, and events.	Highlight Start Date and End Date. Highlight Campaigns column. Highlight Communication Types column. Highlight Events column.
In this case we want to find everyone who was solicited under Autumn campaign, so we'll add this campaign to the criteria.	Click Add. Choose Autumn Campaign. Click OK.
Then under Communication Types, choose "Solicitation." Click OK.	Check Solicitation under Communication Types. Click OK.
Here you'll see the results of our "solicited" search.	Point to the results.
Note that 29 communication records match the search criteria,	Point to the number 29 under Communications.
and that these communications identify 29 distinct contacts.	Point to the number 29 under Contacts.
Now we need to find who attended the "Winter Festival" that was part of this Autumn campaign.	Click New.
We'll call this one "attended."	Enter "attended" into Name field.
Sumac records event attendance as a communication type so we'll find it here.	Click Attended Event under Communication Types.
Then click Winter Festival under Events.	Click Winter Festival under Events. Click OK.
Once again, Sumac instantly performs the search and shows the results. Now we want to find which contacts donated to the campaign.	Point to the number 46 under Communications.

Click New, and we'll name this search "donated."	Click New. Enter "donated" into Name field.
You'll notice that "Donation" is not an option under Communication Types.	Point to options under Communications Types.
However, any time we receive a donation, we send out a thank you letter.	Point to Thank You Letter under Communication types.
So we can choose the Communication Type: Thank you Letter,	Click Thank You Letter under Communication types.
and select the Autumn campaign, then click OK.	Click New. Select Autumn Campaign. Click OK.
If you select all the criteria, Sumac generates a Venn diagram showing contacts who fit all or one of the criteria. To have a closer look, the name of each search and each number in the Venn Diagram are clickable.	Select all search criteria. Point to results in venn diagram.
So, to look at people who were solicited and attended the event, but did not donate, click the number 6	Point to the titles solicited, attended, then donated in venn diagram. Click the number 6.
and Sumac shows the contacts in the bottom right of the window.	Point to list of contacts.
If you decide that you want to see the full contact details of these 6 people, or perform some action, like send them all an email,	
click Show Contacts to see them in the Contacts list window.	Click "Show Contacts."
You now have all the power of the contacts list. You'll find that Explore Communications comes in very handy, but it only works if you take care to track your communications properly.	Show Contacts window.
Sumac can automatically save communication records when you perform communications by doing mail merge, generating labels, or sending bulk email.	Expand Mailings. Point to Mail Merge. Point to Labels/Envelopes. Point to Send Bulk Email.
When saving these communication records, be sure to use appropriate communication types	Expand contact record. Open up Communication record. Point to Communication Type.
and relate them to the relevant events and campaigns.	Point to Event. Point to Campaign.
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