

## Households

<i>Speech</i>	<i>Cursor Actions</i>
<p>In Sumac, there are 3 kinds of contacts: individuals, organizations, and households.</p> <p>An individual is a person. An organization is a business, government body, trust or other similar collectives. A household represents a couple or family.</p>	
<p>Let's start with an example of when you might use the Household function in your database.</p>	<p>Show Contacts window.</p>
<p>John Smith is a board member at your organization. His wife Jane Smith makes monthly donations to your organization. They also have a son named Joey who occasionally volunteers for you.</p>	<p>Highlight John Smith, Jane Smith, then Joey Smith.</p>
<p>They all have individual contact records in your database because you need to keep track of different information for each of them. However, there are some things should describe them as a family. For example, when you send out your newsletter, you want to just send one letter to the Smith household, as opposed to sending three letters, one to each individual at the same address.</p>	
<p>To relate all of them as a family, use the Household button.</p>	<p>Expand Special Editing. Click Households.</p>
<p>Sumac asks if you want to create a new household from existing contacts, or edit the members of an existing household. Click OK to create a new household.</p>	<p>Point to two options. Click OK.</p>
<p>In the next window, Sumac asks us to choose the members for the new household contact. Click Add Member.</p>	<p>Click Add Member.</p>
<p>Type Smith to find contacts whose last name starts with Smith.</p>	<p>Type "Smith."</p>
<p>Click to select John, Jane, and Joey, then click OK.</p>	<p>Select all Smiths. Click OK.</p>
<p>When you are finished, click OK.</p>	<p>Click OK.</p>
<p>Sumac tells you that the next dialog will show the new household contact, and that we should edit all names and addresses to make sure they are correct for the household. When you click OK,</p>	<p>Click OK.</p>
<p>Sumac shows the household contact that it has created from the chosen individuals.</p>	<p>Show Summary tab.</p>
<p>Move through the tabs, and Sumac highlights in red the fields you should probably edit before saving the changes to this Household.</p>	<p>Click Basic tab. Point to red fields.</p>
<p>For example, a Household likely does not need a prefix or First Name.</p>	<p>Remove prefix, first name, etc.</p>

<p>And the Last name should be changed to something like Smith Household.</p>	<p>Make Last Name “Smith Household.” Make Letter Salutation “John, Jane and Joey.”</p>
<p>In Communication Preferences, you can specify what information the household should receive. For example, you may want to set all print mailing communication preferences in the Household contact, and give electronic mailing communication preferences to the individuals, since they likely each have their own email addresses.</p>	<p>Check “Paper Mail” in Communication Preferences.</p>
<p>Note that Sumac automatically created relationships between the Household contact, and each of the individual members to help us keep track of which contacts belong to which household.</p>	<p>Click on the Relations tab. Point to relationships.</p>
<p>Once you're finished editing the household, click OK, to save the new household contact in your database.</p>	<p>Click OK. Sort by last name.</p>
<p>You'll notice that we now have a total of four Smiths in our database: one for John, one for Jane, one for Joey, and finally a Household contact that represents the Smith family.</p> <p>Another very useful feature of Households is that, when doing a mailing, you're able to properly manage communication preferences...</p>	<p>Highlight 4 Smiths in Contacts list.</p>
<p>by using the Filter Households command from the Search Type menu.</p>	<p>Choose “Filter Household” from Search Type drop-down menu.</p>
<p>This allows you to either keep the Households and remove the individual members from your list, or keep the individuals and remove the Households.</p> <p>Imagine you're sending out a paper newsletter.</p>	<p>Highlight two options.</p>
<p>First search to find the contacts who want to receive the newsletter.</p>	<p>Choose “Communication Preference” from Search Type drop-down menu. Choose “Newsletter.” Click Search.</p>
<p>Now that you've found all the contacts you want to send your newsletter to, open the Search Type menu and choose Filter Households.</p>	<p>Click OK. Choose in General Control: Search contacts showing in the list, show only matching. Choose search type: Filter Households.</p>
<p>Sumac asks if we want to keep the household and remove the members, or keep the members and remove the household.</p>	
<p>Since this is a paper newsletter, I choose to keep households and remove the individual members, so that I don't accidentally send multiple copies of my newsletter to the same household.</p>	<p>Highlight “Keep the household, remove the members.”</p>

<p>If I were sending this newsletter by email, I would choose to keep the members and remove the households to ensure that each individual member of a household will receive my newsletter in their email inbox.</p>	<p>Point to “Keep members, remove household.”</p>
<p>Click Search.</p>	<p>Click Search.</p>
<p>Sumac has now filtered out all the individual members of households so that I can send my newsletter out to the appropriate contacts.</p>	
<p>Finally, it is important to consider Households when receipting donations.</p>	<p>Select “All contacts” from the Search Type drop-down menu. Click Search.</p>
<p>If Jane Smith made a donation, the donation should be recorded under her contact record, so that you can receipt this donation to Jane appropriately.</p>	<p>Click to sort by last name. Scroll to Jane Smith. Expand record. Point to donations.</p>
<p>However, if Jane and John make a donation together, the donation should be recorded under the Household record so that the receipt goes to the Smith Family.</p>	<p>Expand Smith household record. Point to donations.</p>
<p><i>Check out more training videos to learn more about Sumac.</i></p>	