

Lookup Lists

<i>Speech</i>	<i>Cursor Actions</i>
Lookup Lists are customizable fields that appear in every list window in Sumac.	
They appear in the form of drop-down menus, like a list of cities, or as groups of checkboxes, like contact types. Lookup lists also let you define extra fields in contact records. They increase the consistency, speed and accuracy of data entry.	Show slide.
To add, change, or remove entries in any lookup list, click Utilities, Customize Database, and Lookup Lists.	Show Console. Expand Utilities. Expand Customize Database. Click Lookup Lists.
Let's add a new communication type to the database.	
Lookup lists are organized by areas. Sometimes, the same lookup list may be in two areas.	Point to Areas.
For example, the list of Accounts appears under Donations and also under Payments. It is exactly the same list of accounts. There is only one list of accounts. But it is listed in both places for convenience.	Click Donations and point to Accounts. Click Payments and point to Accounts.
Let's add a new communication type to the database.	
Click the area that the list relates to.	Click Communications.
Then click the Lookup List you want to edit.	Click Communication Types.
Click New to add a new communication type.	Click New.
Type in the description of the Communication Type.	Type "Thank You Letter" in Description.
Some communication types appear as checkboxes in the Communication Preferences in a contact record. Since Thank You Letters are really just an outbound communication, a contact would not indicate that she does or does not want to receive them.	
So click to indicate that this communication type should not appear as a communication preference.	Mark off "Do not show in contact communication preferences."
Some special types of communications, like medical charting notes, should not be changeable after they have been created.	
If you do not want communication records of this type to be edited once they've been saved in your database, click this checkbox.	Point to "Do not allow communications of this type to be edited after they are saved."
If the particular type of communication should usually be made secure, so only some users can see it, click this checkbox.	Point to "This type of communication is usually sensitive."

Click OK to save this communication type in your database.	Click OK.
You can now use this communication type when saving new communication records in your database.	Click cCommunications. Click New. Open Communication type drop down menu.
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