

Set Up Offices

<i>Speech</i>	<i>Cursor Actions</i>
Office records can be used to put information, like your website, address, or charitable registration number into mail merge documents.	
They can also indicate the address of the office, which can be used to remove countries from labels. Office records also define the servers that Sumac should use to send bulk email in each office location.	Show slide.
To add, remove, or change office records,	Show console.
click Utilities, Customize Database, and Offices.	Expand Utilities. Expand Customize Database. Click Offices.
Your organization's name is already listed here.	Point to Offices.
Double-click to open the office record for your organization.	Open office record.
Specify your organization's mailing address, which can be merged into document templates for thank you letters or receipts.	Enter address.
You can enter your phone number, website and charity number as well.	Point to phone, website and Charity Number fields.
If you use Sumac to send bulk email, enter the information needed to send emails from your office. Sumac needs to know information about your SMTP server so that it knows how it should send emails. This information can usually be acquired from your Internet Service Provider, like Rogers or Verizon.	Point to SMTP server fields.
The Outgoing Email display name and address are the default email name and address for the sender of bulk email.	Enter “Demonstration Charity” in the display name.
Often you specify an info@ account. Note that on any particular bulk emailing, you can override these.	Enter “info@democharity.org” in the email address.
The default office is the office used to calculate Sumac licensing information. If you change which office is the default, or if you change the Organization Name in this default office record, you must re-enter the licensing information for your Sumac installation. Contact Sumac to obtain new licensing information, if necessary.	Point to Default Office checkbox.
<i>Check out more training videos to learn more about Sumac.</i>	