What is in a Contact Record

Speech	*Cursor Actions*
Contact records store core information for each contact in your database.	Show Contact List.
To open a contact's record, double-click the contact in the Contacts list.	Double-click a contact.
You'll notice there are several tabs across the top of the contact record for storing different kinds of information. The exact list of tabs varies from one database to another because you have the option of which ones to show.	Point to tabs across the top.
The Summary tab is a summary of this contact in your database. So at a quick glance, you see some standard information about the contact, like their name, phone number, email, street address, contact types, and some recent communications you've had with them.	Point to each piece of information in the Summary tab.
The Basic tab is for storing demographic information about this contact: name, gender, and letter salutations. The letter salutation is what goes after “Dear” in a letter when you do a mail merge. Sumac shows what the default it will use, so often you do not have to enter anything into this field.	Click Basic tab. Point to each field.
You can specify information about handling donations for a contact.	Point at row of information about donations.
You can enter free-form notes but you rarely need to do this because there is almost always a better place to put information.	Point at notes.
You can enter an alert to record something special or unusual about this contact. An alert makes a contact red in the contacts list.	Enter *Big Donor* in alert field. Click OK to save contact, show that he is red in the contacts list.
Now, whenever someone looks at this contact, the alert message shows up first, before the contact record appears.	Double click, point at the alert, click OK to see the contact record.
Click to specify contact types and communication preferences for this contact so you know the kind of contact this is, as well as what information they do or do not want to receive from you.	Expand Contact Types. Expand Communication Preferences.
If you have Sumac's volunteers module, you can also click any applicable volunteer types for this contact so you can classify your volunteers.	Expand Volunteer Types.

The Relations tab lets you relate any contact with any other contact in your database. This records the network of contacts within your database. For example, perhaps you have an organization contact in your database, as well as some individuals who work at that organization. Recording a relationship between the organization and the contacts who work there helps you track which of your contacts work for the same organization.	Click Relations tab.
Click New to create a new relationship between those contacts.	Click New.
Choose the type of relationship you want to create. Click the Contact icon to choose the related contact.	Choose Relationship “works for.” Choose Company.
Click OK, to return to the contact record.	Click OK.
The Residence Address tab stores the contact's home address.	Click Residence tab.
Sumac understands and automatically formats several countries' postal codes.	Point to Postal Code field.
It also automatically formats phone numbers for you. You can use this address when mailing to a contact's home address.	Point to Phone field.
The Business Address tab looks a lot like the Residence Address tab, but it is for this contact's work address.	Click Business tab.
It also stores fields for Title, Department and Organization at the top, as well as fields for an assistant at the bottom.	Point to Title, Department Organization. Point to Assistant field.
There's also a checkbox that tells Sumac to use this address for mailings, so that if a contact has both a home and a work address, Sumac knows which address to use for paper mailings.	Point to “Use this address for mailings.”
The Vacation Address tab lets you store a contact's vacation address and effectivity dates.	Click Vacation Address.
So if, for example, you know that this contact always goes on vacation to their family's cottage for two weeks every July, you can still keep in touch with them while they're away.	Point to Effectivity Dates.
The Facts tab allows you to store a variety of facts about your contact.	Click Facts tab.
Click New to create a new Fact, and choose what kind of Fact you want to create.	Click New.

Facts allow you to record information about this contact's personal history, like education or employment, as other types of information, like their giving history with organizations that are similar to yours, or any planned gifts you know a contact intends to make. Recording this information in your Facts tab also makes that information searchable, so you can easily find contacts with Facts of a particular type.	Point to Fact list.
Note that a Giving History fact does *not* describe gifts to your own organization, since they are recorded, in detail, in donation records. Instead, a Giving History fact describes donations made by this contact to other organizations.	Point to Giving History.
The Picture tab allows you to include a small photo of a contact within their record. It's occasionally quite helpful to be able to look at a photo of contact to quickly jog your memory before a meeting, for example.	Click Picture tab.
The Funder tab comes with the Fund Requests module. It lets you record information about a funding body, like the funding programs they run. If you do not have the Fund Request module in your installation of Sumac, this tab will not appear.	Click Funder tab.
The Membership Directory tab comes with the Memberships module, and let's you define how you want this contact to appear in your Membership Directory. If you do not have the Memberships module in your installation of Sumac, this tab will not appear.	Click Membership Directory tab.
The History tab lets you view an entire history of interactions with this contact –	Click History tab.
Communications, Donations, and any other related information	Point to list of records.
If you want to view the contents of any of these records, you can double-click the record in this list to view its details.	Double-click a Communication record.
The History tab also includes a Donation Summary at the top, so at a quick glance, you're able to see a summary of the contact's donation history, like	Expand Donation Summary.
how many Donations they've made, their largest, smallest, and average donation size, as well as which years they've donated.	Point to each field.
Now tabs from History to the left are all standard and defined by Sumac. However, many organizations include additional, custom fields in the contact record. Your Sumac Administrator can customize the contact record to add any additional tabs for including that additional information.	Point to History, scroll across the left to Basic.
Click OK to save any changes you've made to a contact's record.	Click OK.
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