



Membership Reporting System

Table of Contents

Revision Notes	4
INTRODUCTION	5
How to use this manual.....	5
Installing the membership database system.....	6
Access ID and Password	6
Data Security.....	7
Important Dates	8
Affiliation Fees and Membership Data	8
Who Has Access to Your Data and for What Purpose	9
Log on To Sumac.....	10
The Contacts search screen and main menu	13
The Menu Section	14
New	15
Add to Contact (Not used by Bowls BC).....	15
Duplicate.....	15
Delete	15
Export	15
Print.....	15
Special editing.....	15
Mailing.....	15
Email.....	15
Analyze and Report.....	16
Reload	16
Help Videos and Resources	16
The Search Criteria Section.....	17
The Search Results Section.....	20
Adding a new member.	21
1 Basic.....	22
Inactive Member	23
2 Residence Address	23
3 Business Address.....	23

4 Emergency Contact	23
5 Club	24
6 Profile.....	24
Printing	25
Printing Problems	27
1 Format	28
2 Export.....	28
Community Engagement.....	29
Glossary of terms.....	31
Exporting to a spread sheet.	32

Revision Notes

March 23 2022 - The following updates are included

1. Important dates
 1. Updated membership reporting dates for 2022/2023
2. Paid Field
 1. A new optional field added to the basic information page on web site that can be used to track members that have paid their membership fees.
3. Membership Types – two new types are available (see basic information page on web site), but your club will need them to be turned on by Bowls BC Membership
 1. X-Extended – this is a special membership type that can be used to identify a multi year membership payment. It is used with the Extended Membership Expiry date field described below. The member must also be recorded using another membership type such as Full Member.
 2. X-Other – this is a special membership type that can be used to identify non-bowler memberships such as croquet or Lions Club. It is used with the Other Membership Types field described below.
 3. Extended Membership Expiry date – used with X-Extended membership type.
 4. Other Membership Types – used with X-Other to indicated what that membership type is, eg Croquet.
4. Director information (see club page on web site)
 1. Director check box – check this box if member is a directorship and remember to uncheck if member is no longer a director.
 2. Criminal record check – optional
 3. Director Position – select director position(s)
5. Mandatory Fields (see profile page on web site)
 1. Over 54 – only visible to clubs that have requested this option. It allows a breakdown of members ages 55 – 64 and 65 +
6. Birthday – Only visible to clubs that have requested this field
7. Vaccination – Only visible to clubs that have requested this field.

INTRODUCTION

Bowls BC is working hard at standardizing how we collect our information to be more efficient.

Bowls BC receives financial support from ViaSport and Sport BC based on the number of members in various categories so, by ensuring all information is accurate and complete, you help streamline the reporting process to them.

Further, it helps BBC analyze membership data to strategize for membership growth and participation throughout the Province.

We appreciate your hard work and time in providing this information to us.

The Bowls BC Membership data base is built using the SUMAC contact database. As a result the terms SUMAC may be used when referring to the Bowls BC database.

As well as supporting the Bowls BC requirements many clubs have found that they can completely replace their own in house spread sheet system with an easy to use and ready made system that fully supports and streamlines their Membership management requirements.

How to use this manual

This manual describes how to use the many features of the Bowls BC membership website and data base. The website is built on the SUMAC Contact Management system. As a result some terminology needs to be understood. For a glossary of terminology please see the end of this document. The following conventions have been used.

Text highlighted in yellow are features and warnings that you must be aware of.

Any member data presented on the screen examples are fictitious.

For more help there are videos linked to each website page that take you to the SUMAC site. These videos are generic and do not have Bowls BC terminology nor exact examples. However they are useful in understanding how the system works.

Bowls BC did not use all the features available on the SUMAC system but only those related to Contact (Membership) management, reporting and communications.

For further help please contact Bowls BC at membership@bowlsbc.com

Installing the membership database system.

Go to <https://www.sumac.com/install/>



Select the appropriate install for your computer and follow the instructions.

The Bowls BC systems administrator will need to connect the system to the data base which is held in a secure offsite location. Contact membership@bowlsbc to arrange for this to be done.

Access ID and Password

Once the system has been installed you will need to get an Access ID and Password. To do this complete the Authorization form FUN007. You will need to get a club director to authorize the request. Please request this form from Membership@bowlsbc.com

Data Security

Your club data resides on a shared database with all other Bowls BC clubs data. Your data is stored in a separate segment on the database so that only your club has access to it. Your ID and Password ensures that you only have access to your club data and you cannot see or modify any other clubs data. The SUMAC software captures the ID of the person that added or made changes to Membership data.

Important Dates

Affiliation Fees and Membership Data

2022 January 22 Bowls BC sends clubs Affiliation fees and Bowls Canada Fees invoice based on 2019 membership.

2022 June 15th Payment: Bowls BC Affiliation fees and Bowls Canada fees to be submitted on this date based on prior years membership numbers. Affiliation fees must be submitted to: The Treasurer, Bowls BC

2022 September 15th. All Membership data, whether entered into the SUMAC database or by Spread Sheet must be received and be complete. This will enable Bowls BC to submit requests for funding from via Sport and Sport BC.

2023 February 28th. Indoor clubs updated and finalized membership numbers

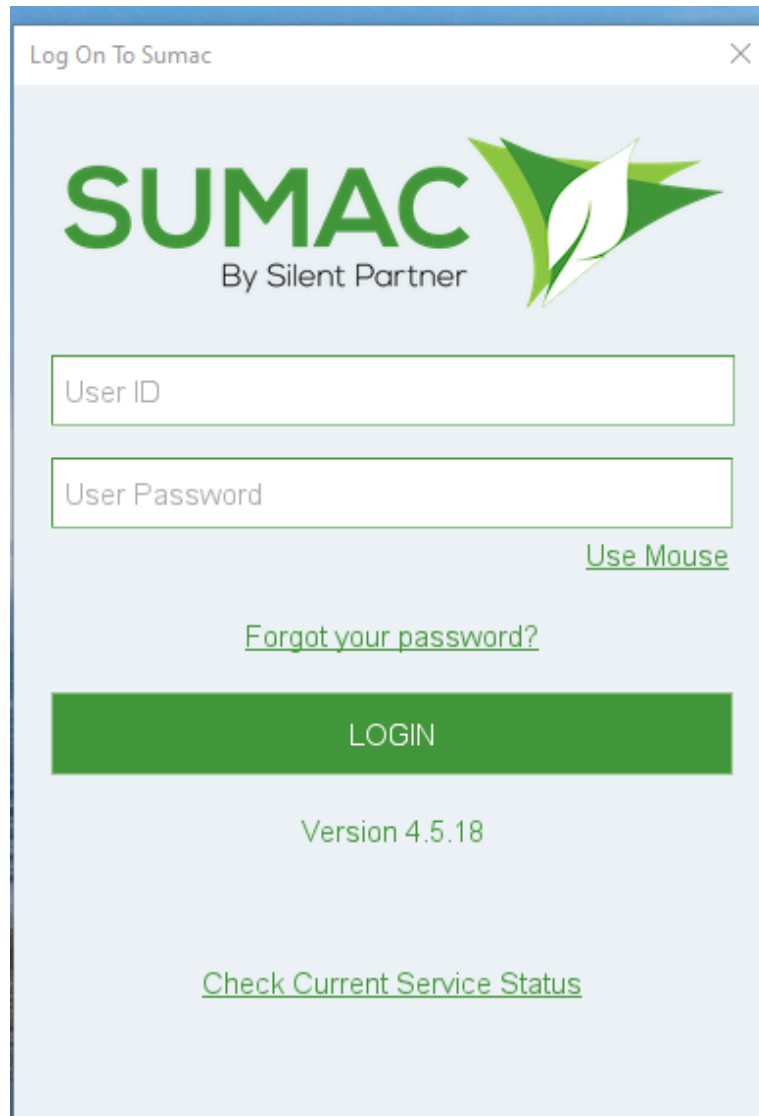
2023 March Bowls BC sends clubs Affiliation fee and Bowls Canada invoice to clubs based on final 2022 Membership.

Who Has Access to Your Data and for What Purpose

Position	Security
Club Membership Director and other authorized club member	Can Add and Change their Club Member Data Can inactivate Member Data Can reactivate Member Data Can Change Director records in Club Organizations Can Print reports of Club Directors within Region
Bowls BC Membership Committee	Can View all Clubs Member Data. On request from club <ol style="list-style-type: none">1. Can Update membership status during annual reset of Members Data2. Can Delete Specific Member Data3. Can Purge old non-member data from Database Can View Club Directors May summarize data for as requested by Bowls BC Directors

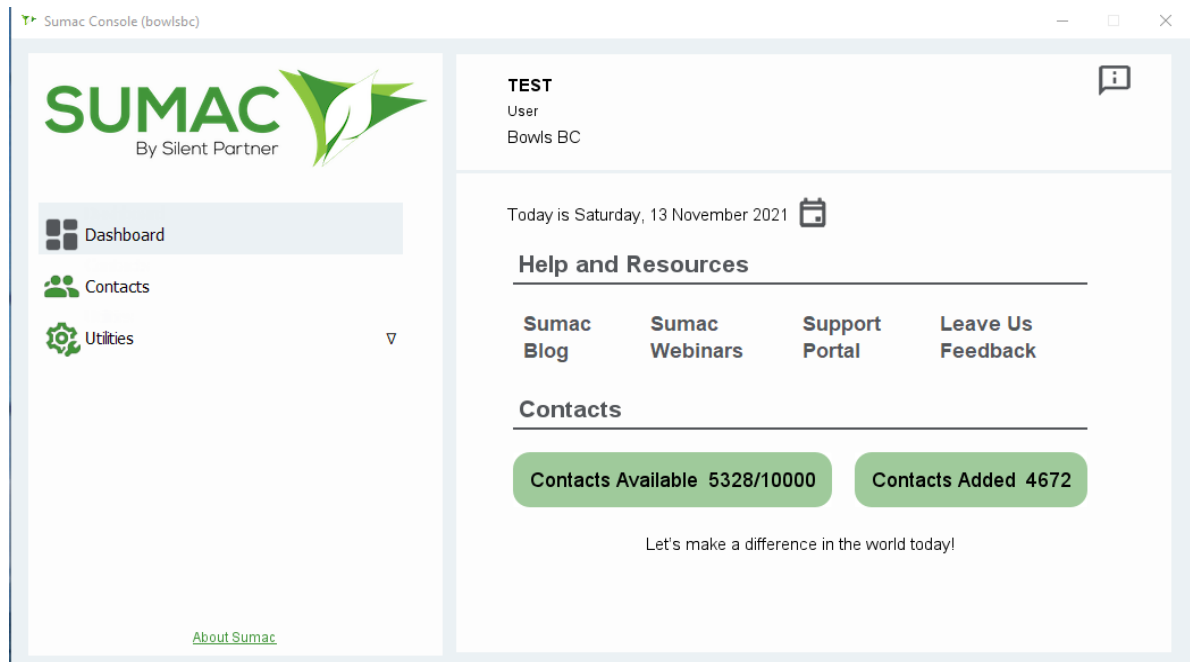
Log on To Sumac

You will need an ID and Password that can be obtained by completing form FUN007 and sending it to membership@bowlsbc.com



The screenshot shows a web browser window titled "Log On To Sumac". The main content area has a light blue background. At the top, the "SUMAC" logo is displayed in large green letters, with "By Silent Partner" in smaller text below it. To the right of the text is a green leaf-like graphic. Below the logo, there are two white input fields with green borders: the first is labeled "User ID" and the second is labeled "User Password". To the right of the password field is a green link that says "Use Mouse". Below these fields is a green link that says "Forgot your password?". At the bottom of the login area is a large green button with the word "LOGIN" in white capital letters. Below the button, the text "Version 4.5.18" is displayed. At the very bottom of the window is a green link that says "Check Current Service Status".









Enter your ID and Password
A screen similar to the following will be presented.



On the left of the page there are three items in the menu

1. Dashboard – this is the screen you are looking at
2. Contacts – selecting this will take you to the main membership screen from where you will perform all your membership maintenance, reporting and emailing. Contacts is the Sumac terminology for Members.
3. Utilities – this menu has a sub-menu, which is explained below.

The Utilities menu contains the following options. Clicking the down arrow for each sub menu item will show a further set of menu items.

	Utilities	Δ
	Import	▽
	Template	▽
	Customize Database	▽
	Sumac Administration	▽
	Web Integration Set Up	▽
	Install Support Software	
	Change My Password	

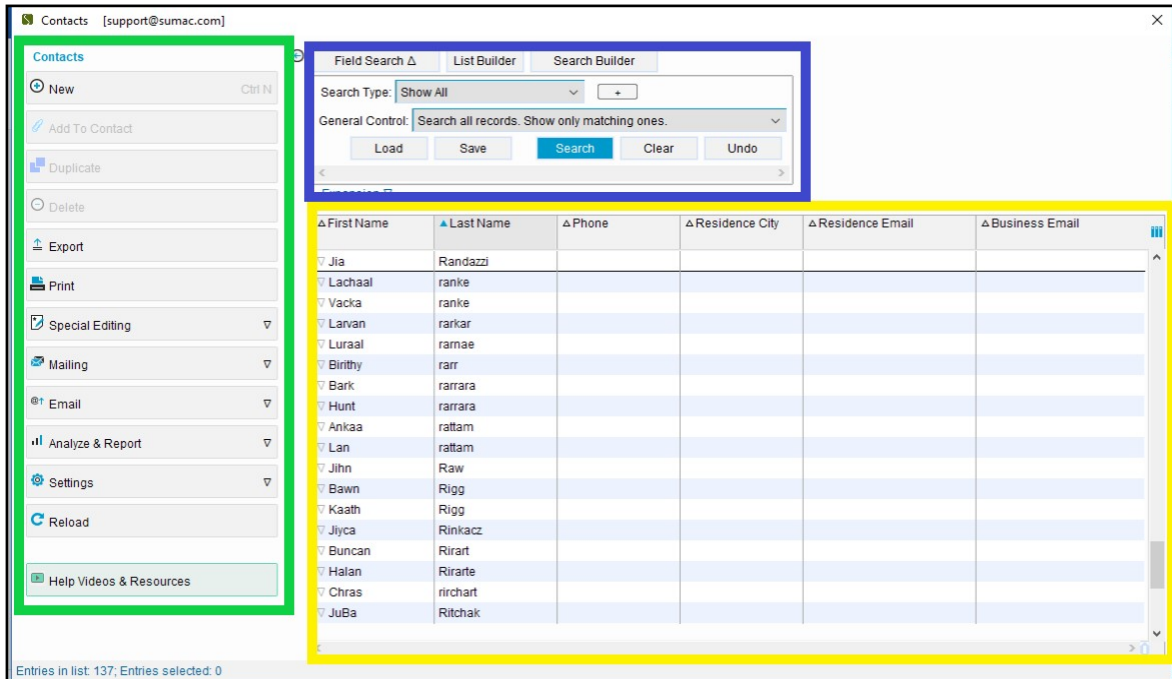
The sub menu items should only be used by Bowls BC with the exception of

1. Change my Password (you should do this on a regular basis)
2. Sumac Administration – Appearance – where you can change the font size and colours of text displayed.

The Contacts search screen and main menu

This screen is the starting point for adding, changing, reporting, emailing and reviewing all your club's member data.

The screen is divided into 3 areas. The **menu section** on the left (green area) controls what you want to do, the **search criteria** section at the top right (blue area) and the **search results section** (yellow area) below that.



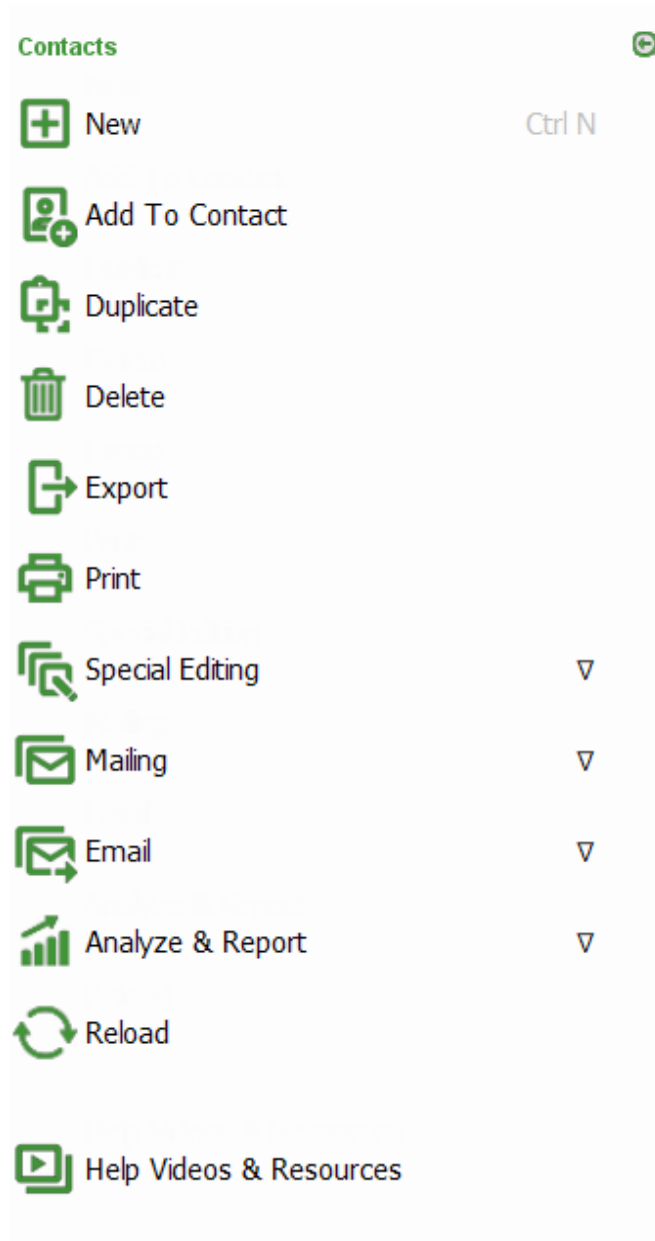
The screenshot shows the 'Contacts' application window with the following sections highlighted:

- Menu Section (Green):** A vertical sidebar on the left containing options: New (Ctrl N), Add To Contact, Duplicate, Delete, Export, Print, Special Editing, Mailing, Email, Analyze & Report, Settings, Reload, and Help Videos & Resources.
- Search Criteria Section (Blue):** A panel at the top right with tabs for 'Field Search', 'List Builder', and 'Search Builder'. It includes a 'Search Type' dropdown set to 'Show All', a 'General Control' dropdown set to 'Search all records. Show only matching ones.', and buttons for 'Load', 'Save', 'Search', 'Clear', and 'Undo'.
- Search Results Section (Yellow):** A table displaying member data with columns: First Name, Last Name, Phone, Residence City, Residence Email, and Business Email. The table contains 13 rows of data.

At the bottom of the window, it states: 'Entries in list: 137; Entries selected: 0'.

First Name	Last Name	Phone	Residence City	Residence Email	Business Email
Jia	Randazzi				
Lachaal	ranke				
Vacka	ranke				
Larvan	rarkar				
Luraal	ramae				
Birithy	rarr				
Bark	ramara				
Hunt	ramara				
Ankaa	rattam				
Lan	rattam				
Jihn	Raw				
Bawn	Rigg				
Kaath	Rigg				
Jiyca	Rinkacz				
Buncan	Rirart				
Halan	Rirarte				
Chras	rirchart				
JuBa	Ritchak				

The Menu Section



Each menu item is described separately.

New

This menu item will take you to the Add a new Contact screen.. Contact is a Sumac word that means Member.

Add to Contact (Not used by Bowls BC)

This menu option will only display if you have selected a member from the search dialog box. Selecting this box will display another pop up menu. Currently Bowls BC does not support any of the options in this pop up screen.

Duplicate

This menu option will only display if you have selected a member from the search dialog box. You can use this effectively when you are adding another family member. Selecting this menu option presents the details of an existing member and all of their associated data. You can make changes to the data presented and save it as a new member.

Delete

This menu option will only display if you have selected a member from the search dialog box.

Using this option allows you to delete one or more selected members. Follow the prompts to complete the deletion.

Export

This option allows you to export all or selected members and exporting their data to a spread sheet. Exporting does not remove any data from the database.

Print

This option allows you to create and print to a printer or create a pdf of selected members. This option is described in greater detail in this manual. SUMAC also provides a very good video explaining how to use this option.

Special editing

The basic option presented here allows for searching the database and finding duplicates. Other special editing such as batch editing can be turned on by the Bowls BC System Administrator at membership@bowlsbc.com

Mailing

This section of menu options allows you to create documents. You can use mail merge codes to personalize documents and extract members data. An example is illustrated later in this document. You can also find excellent SUMAC videos on this subject.

Email

This section of the menu allows you to send personalized emails from your own email account to all or selected groups of members. For example you could send an email just

to coaches or juniors or everyone. The email system has to be set up for each club, preferably using a gmail account. Contact Membership@bowlsbc.com to get this set up. There are SUMAC online tutorials that provide excellent training on how to use the email system.

Analyze and Report.

These are all SUMAC defined reports and are not very useful. However you can utilize the last of these reports “Quick Count”. See an example later in this document.

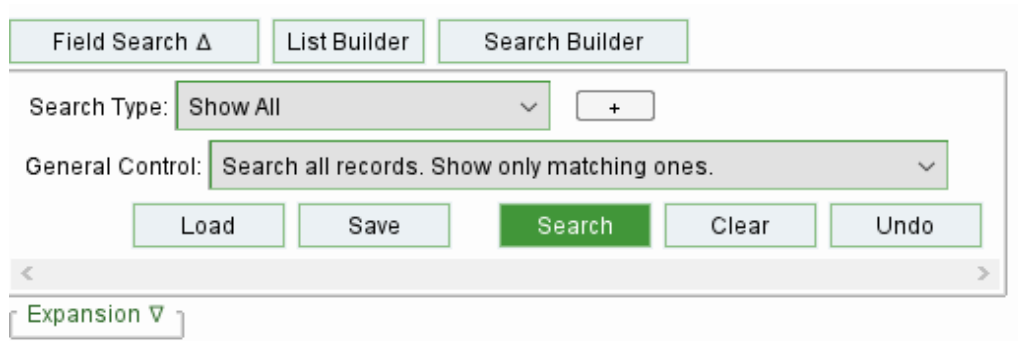
Reload

It is not recommended that you use this function. However if you want to learn more about it refer to the SUMAC videos.

Help Videos and Resources

From here you can find all the SUMAC help videos. Remember that they are generic and do not refer to any Bowls BC specific fields.

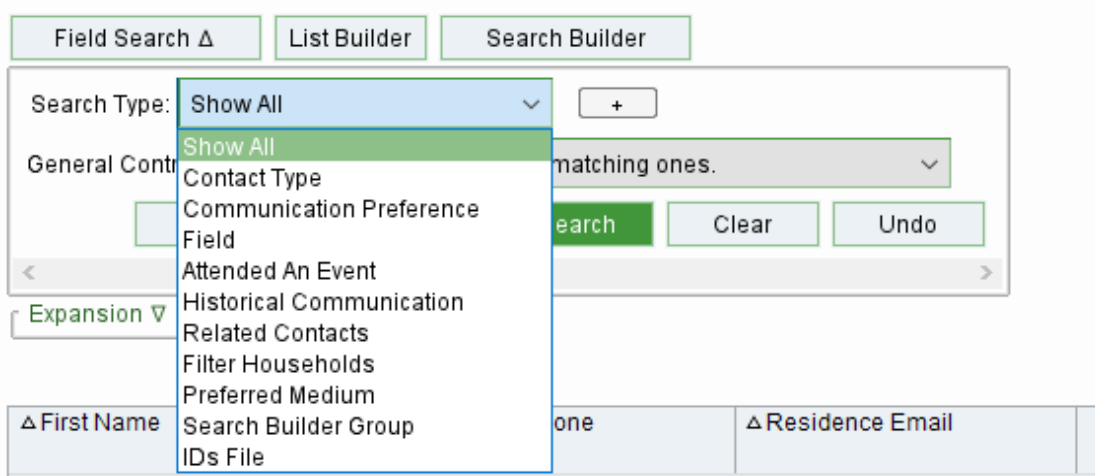
The Search Criteria Section.



The most useful search criteria fields are under the Field Search menu. The picture above is that screen. List Builder and Search Builder are more advanced search engines and are not covered in this document. However there are very good SUMAC videos available that explain how to use them for the advanced user.

This is the default screen that automatically selects all of your members, whatever Contact Type they may be, inactive or inactive.

Selecting the Show All list will present you with the following drop down list.



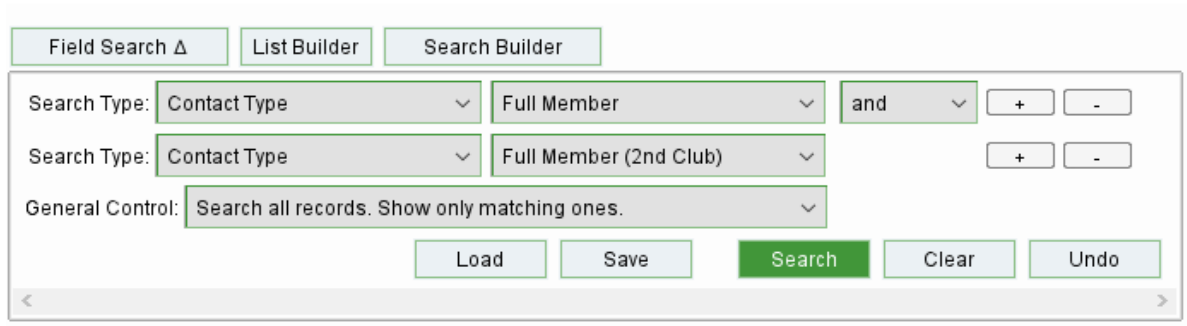
Of these options only 2 are used by Bowls BC.

1. Contact Type

2. Field

Choosing the “contact type” provides you with the ability to filter one or more contact types for your search.

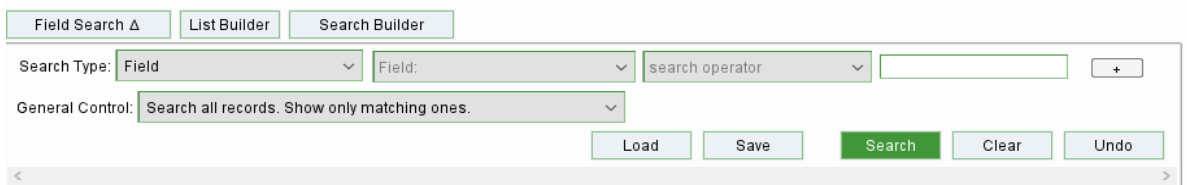
Here is an example of filtering the members to select only Full Time Members and Full Time Members (2nd Club)



The screenshot shows the 'Search Builder' tab selected. It contains two search criteria rows. The first row has 'Search Type' set to 'Contact Type' and 'Full Member'. The second row has 'Search Type' set to 'Contact Type' and 'Full Member (2nd Club)'. The criteria are connected by an 'and' operator. Below the criteria is a 'General Control' dropdown set to 'Search all records. Show only matching ones.' At the bottom are buttons for 'Load', 'Save', 'Search' (highlighted in green), 'Clear', and 'Undo'.

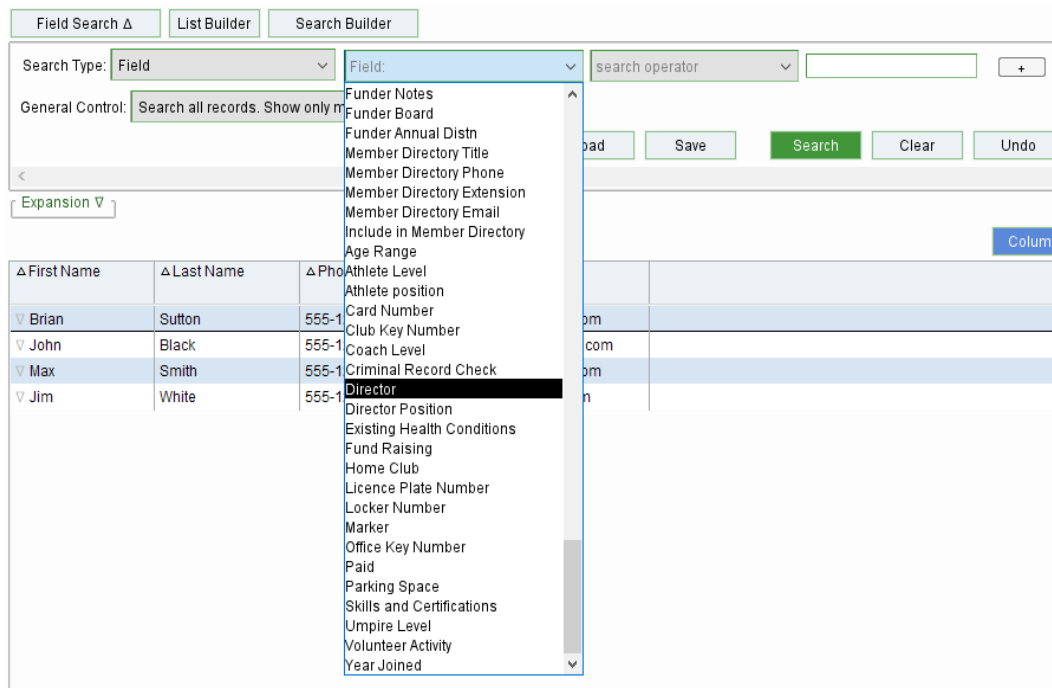
Then click the green **Search** button to display the results below in the Search Results area.

If you want to filter on any other field in the database select the Field option.



The screenshot shows the 'Search Builder' tab. The 'Search Type' dropdown is set to 'Field'. The 'Field' dropdown is empty. The 'search operator' dropdown is also empty. The 'General Control' dropdown is set to 'Search all records. Show only matching ones.' At the bottom are buttons for 'Load', 'Save', 'Search' (highlighted in green), 'Clear', and 'Undo'.

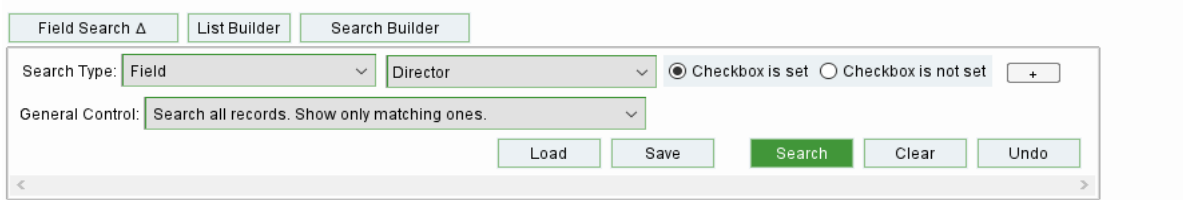
For example to filter club directors only select “Director” from the second field (from the left) drop down list,



The screenshot shows the 'Search Builder' tab in the 'Field Search' section. A dropdown menu is open, displaying a list of fields. The 'Director' field is highlighted. The 'General Control' is set to 'Search all records. Show only m'. The 'Search Type' is 'Field'. The 'search operator' is empty. The 'Load', 'Save', 'Search', 'Clear', and 'Undo' buttons are visible.

Δ First Name	Δ Last Name	Δ Photo
▼ Brian	Sutton	555-1
▼ John	Black	555-1
▼ Max	Smith	555-1
▼ Jim	White	555-1

As this field is a check box you will have two further options displayed. See screen shot below



The screenshot shows the 'Search Builder' tab in the 'Field Search' section. The 'Director' field is selected. The 'General Control' is set to 'Search all records. Show only matching ones.'. The 'Search Type' is 'Field'. The 'search operator' is empty. The 'Load', 'Save', 'Search', 'Clear', and 'Undo' buttons are visible. The 'Checkbox is set' radio button is selected.

The option “Checkbox is set” is the default choice, so now click Search to display all the Club directors.

For more generic descriptions of how to use the “Search Criteria Section” select the “Help Videos and Resources” menu.

The Search Results Section

This section shows the results of the search based on the criteria entered in the “Search Criteria Section”.

The columns displayed can be changed by selecting the blue **Columns** box.

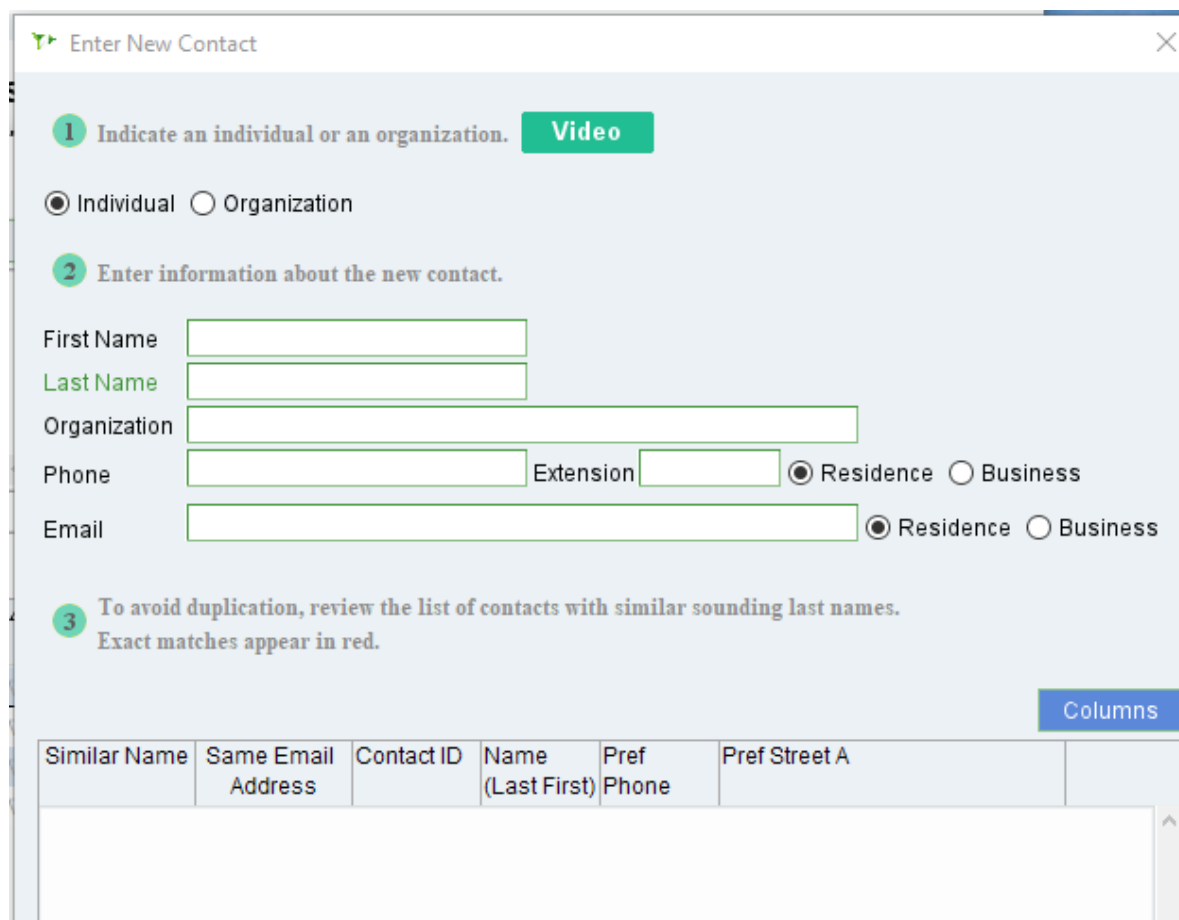
Clicking the header for any column will sort that column.

For detailed instructions on how to use this section refer to the SUMAC videos.

Adding a new member.

Select New from the menu

The following screen is presented.



1 Indicate an individual or an organization. **Video**

☒ Individual ☐ Organization

2 Enter information about the new contact.

First Name

Last Name

Organization

Phone Extension ☒ Residence ☐ Business

Email ☒ Residence ☐ Business

3 To avoid duplication, review the list of contacts with similar sounding last names. Exact matches appear in red.

Columns

Similar Name	Same Email Address	Contact ID	Name (Last First)	Pref Phone	Pref Street A

The following fields are mandatory

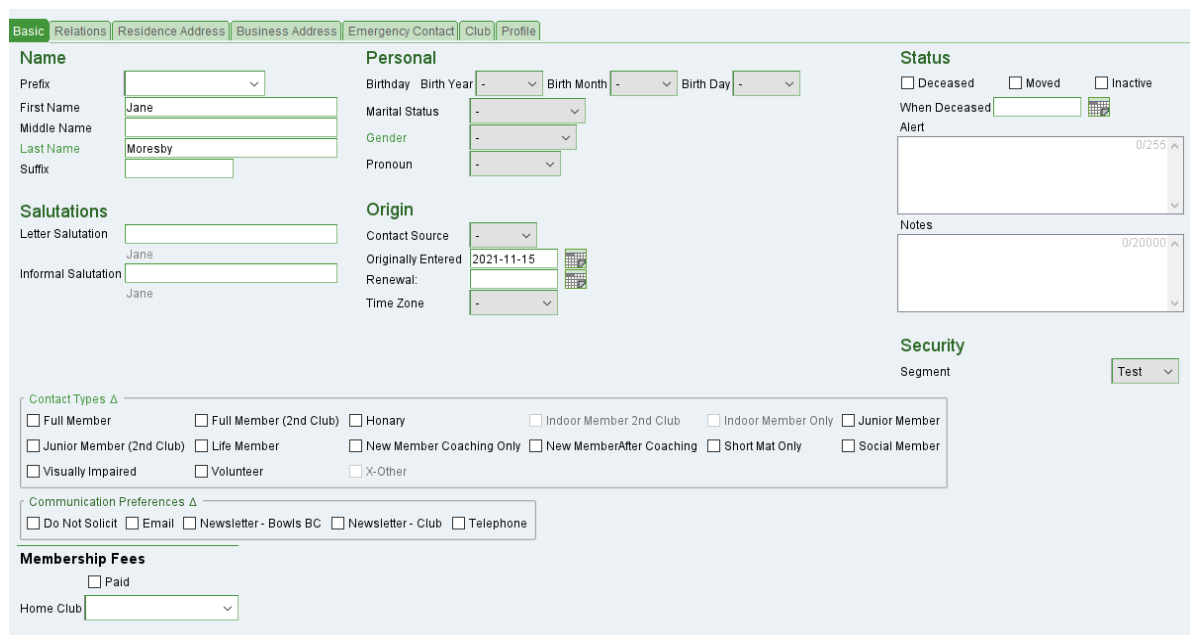
1. First name
2. Last name

The following fields are optional

1. Phone
2. Email

If the first name and last name match a member already registered in your club it will be displayed in the area below.

Click OK at the bottom of the screen. This presents the Member screens. See next screen shot.



Basic | Relations | Residence Address | Business Address | Emergency Contact | Club | Profile

Name
 Prefix: [Dropdown]
 First Name: [Text: Jane]
 Middle Name: [Text]
 Last Name: [Text: Moresby]
 Suffix: [Text]

Personal
 Birthday: [Dropdown] Birth Year: [Dropdown] Birth Month: [Dropdown] Birth Day: [Dropdown]
 Marital Status: [Dropdown]
 Gender: [Dropdown]
 Pronoun: [Dropdown]

Status
☐ Deceased ☐ Moved ☐ Inactive
 When Deceased: [Text]
 Alert: [Text: 0/255]
 Notes: [Text: 0/20000]

Salutations
 Letter Salutation: [Text: Jane]
 Informal Salutation: [Text: Jane]

Origin
 Contact Source: [Dropdown]
 Originally Entered: [Text: 2021-11-15]
 Renewal: [Text]
 Time Zone: [Dropdown]

Security
 Segment: [Text: Test]

Contact Types
☐ Full Member ☐ Full Member (2nd Club) ☐ Honary ☐ Indoor Member 2nd Club ☐ Indoor Member Only ☐ Junior Member
☐ Junior Member (2nd Club) ☐ Life Member ☐ New Member Coaching Only ☐ New MemberAfter Coaching ☐ Short Mat Only ☐ Social Member
☐ Visually Impaired ☐ Volunteer ☐ X-Other

Communication Preferences
☐ Do Not Solicit ☐ Email ☐ Newsletter - Bowls BC ☐ Newsletter - Club ☐ Telephone

Membership Fees
☐ Paid
 Home Club: [Dropdown]

This is the main set of screens into which membership data is added. The screens are identified by the tabs at the top of the screen. They are listed below. Note that the Relations tab is not used by Bowls BC or Clubs. As a result it is not described below.

1 Basic.

This screen contains basic member profile data. The field Segment (below Security) is your club name. This field cannot be changed.

Mandatory fields

1. First name
2. Last name
3. Gender
4. Contact Type (Member Type) –
 1. NOTE: Social Members are members that have limited membership benefits, mainly not being able to bowl. This information is collected to help measure the community engagement and use of your facility. Clubs may enter Social Members data into the data base. This is optional, and this level of detail is not required by Bowls BC. However, it may be of use to Clubs for reporting and communications purposes. **Clubs that do not enter Social Membership data into the Membership System will be required to report the total number of Social Members to Bowls BC separately**

2. Other – This is a special Membership Type used by some clubs. These are non-Bowling memberships that use the club facilities. If the “Other” member type is selected then they can be qualified by a separate set of Membership Types. If your club requires this option contact the Systems Administrator at membership@bowlsbc.com to set this up.
5. Communication Preferences - NOTE: To conform with provincial privacy laws, Communication Preferences must be supported by a signature on the Members’ Application/Membership Renewal form.
6. Home Club (If member has paid Bowls BC affiliation fees at another club, then that club is their Home Club. Their Membership Type would be Full Member (2nd Club))

All other fields are optional including;

1. Paid – This field can be used to indicate if the member has paid club fees. This field has to be set off at the beginning of every year.

Inactive Member

Once a member has been assigned a Contact Type and saved, the member is now considered an Active Club Member. Rather than deleting non-returnees, inactivating them keeps them in the database for future contact. This preserves the personal and contact data so if they rejoin at a later date, the data is already there.

2 Residence Address

All fields on the page are optional. However if the emailing function is to be used then the Email field should be entered. All information on this page can be included in reports and emails.

3 Business Address

All fields on the page are optional. All information on this page can be included in reports and emails.

4 Emergency Contact

All fields on the page are optional. All information on this page can be included in reports and emails.

5 Club

This page is in two sections. The top section is optional and describes tangible assets that may be assigned to a member. The bottom section must be completed for all Directors.

For each Director, check the Director box AND then select the Directors Position from the list below. More than one position may be selected. If there is not a description for a Director you may type it in.

6 Profile

This screen is divided into several sections. Each is described below.

1. Year Joined This Club – Optional – select year from drop down list

2. Mandatory fields

1. Year Started Bowling – select field from drop down list
2. Athlete Level – Select level from drop down list
3. Age Range – Select from drop down list

3. Athlete Position – Optional – select from drop down list

4. Certified Coach – Complete this section if member is a coach

1. Coach Level – select from drop down list
2. Criminal Record Check – select year of latest criminal record check

5. Umpire – Complete this section if member is an umpire

1. Umpire Level – select from drop down list
2. Marker – optional

6. Volunteer and Fund Raising – Optional

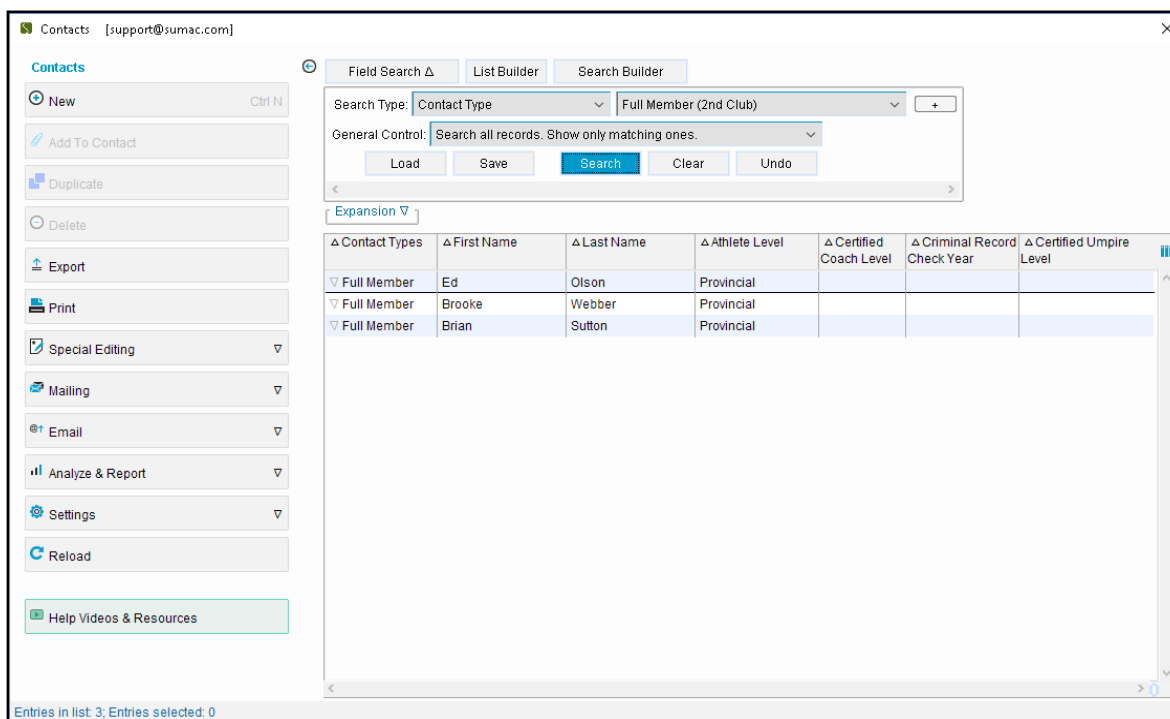
7. Vaccine – Optional. This field can be used to indicate which members have received a full Covid vaccination

Printing

Reports or Lists can be printed using the available fields such as all the club members who play provincially and belong to a second club.

Select the Search Type. In this case:

- 1) Contact Type and
- 2) Full Member (2nd Club).
- 3) Select Print



The screenshot shows the 'Contacts' window with the following search configuration:

- Search Type:** Contact Type
- Search Value:** Full Member (2nd Club)
- General Control:** Search all records. Show only matching ones.

The search results table is as follows:

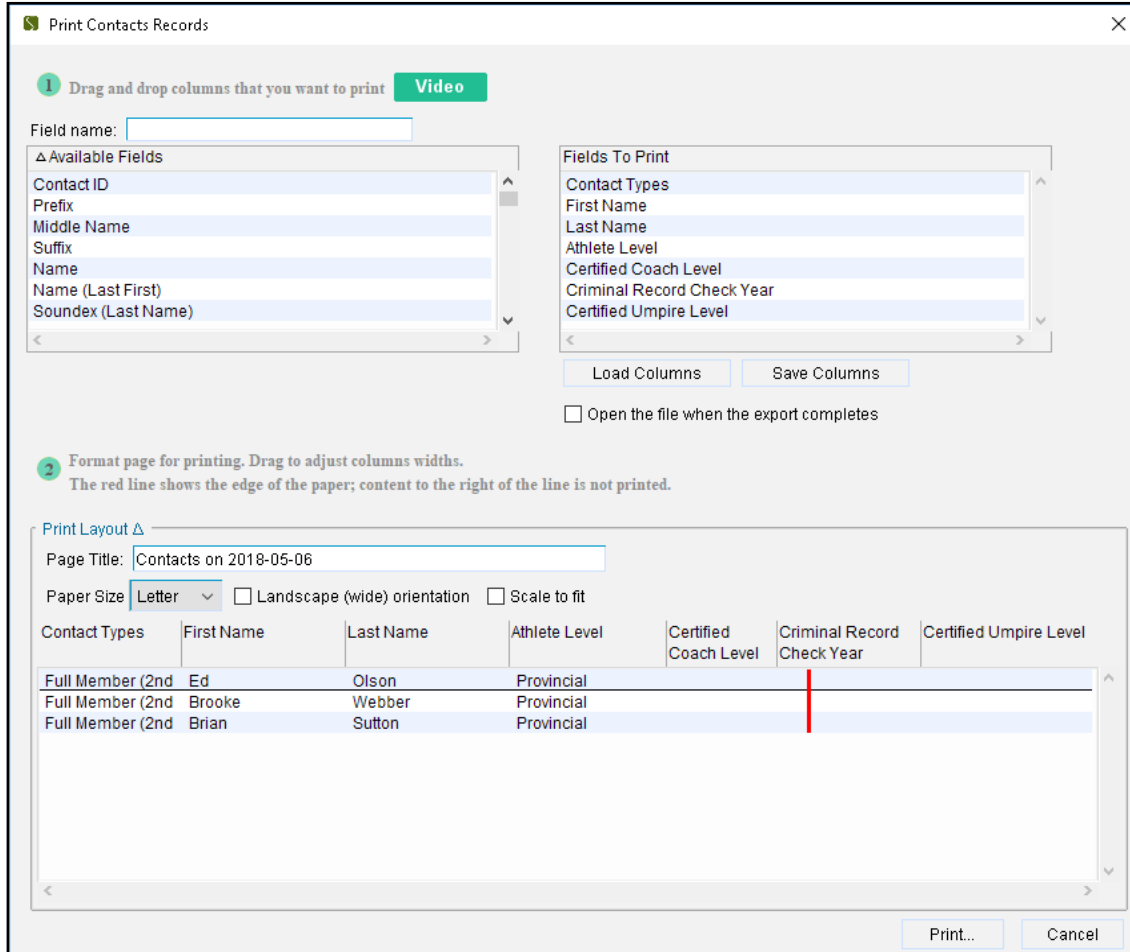
△ Contact Types	△ First Name	△ Last Name	△ Athlete Level	△ Certified Coach Level	△ Criminal Record Check Year	△ Certified Umpire Level
▽ Full Member	Ed	Olson	Provincial			
▽ Full Member	Brooke	Webber	Provincial			
▽ Full Member	Brian	Sutton	Provincial			

At the bottom of the window, it states: "Entries in list: 3; Entries selected: 0"

The **Print Contacts Records** windows appears.

The right-side panel, Fields to Print, has the list of fields to be printed. It contains all of the fields, some of which are not required.

To remove fields not required, left click your cursor on the field and drag to the left.



Print Contacts Records

1 Drag and drop columns that you want to print [Video](#)

Field name:

Available Fields

- Contact ID
- Prefix
- Middle Name
- Suffix
- Name
- Name (Last First)
- Soundex (Last Name)

Fields To Print

- Contact Types
- First Name
- Last Name
- Athlete Level
- Certified Coach Level
- Criminal Record Check Year
- Certified Umpire Level

[Load Columns](#) [Save Columns](#)

☐ Open the file when the export completes

2 Format page for printing. Drag to adjust columns widths.
The red line shows the edge of the paper; content to the right of the line is not printed.

Print Layout

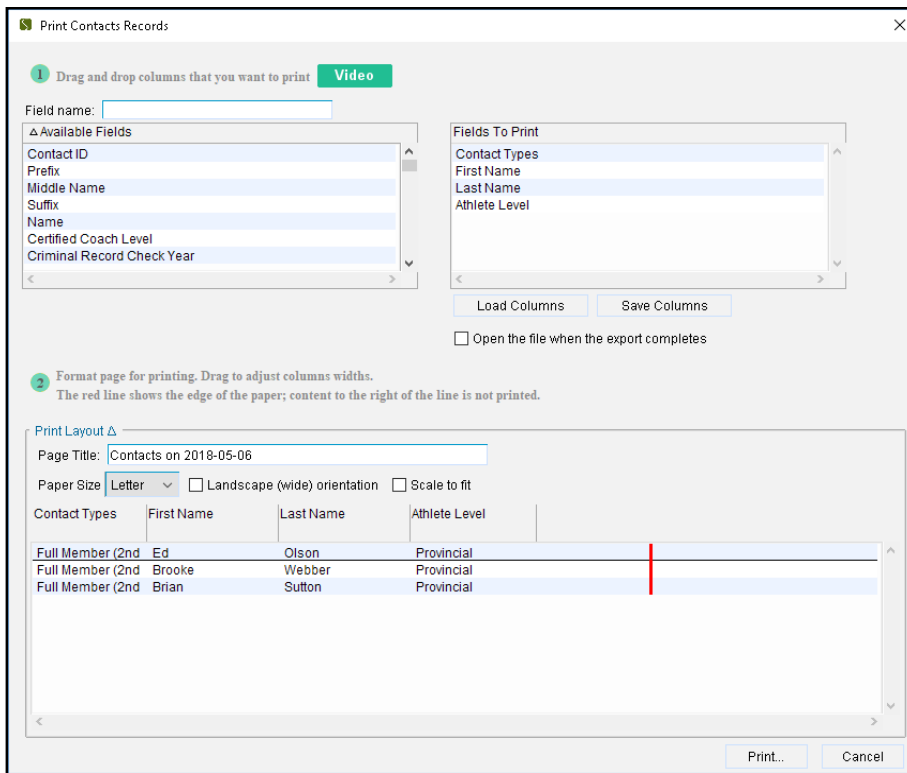
Page Title:

Paper Size: ☐ Landscape (wide) orientation ☐ Scale to fit

Contact Types	First Name	Last Name	Athlete Level	Certified Coach Level	Criminal Record Check Year	Certified Umpire Level
Full Member (2nd	Ed	Olson	Provincial			
Full Member (2nd	Brooke	Webber	Provincial			
Full Member (2nd	Brian	Sutton	Provincial			

[Print...](#) [Cancel](#)

When you have the required fields, click on the **Print** button at the bottom of the window.



Print Contacts Records

1 Drag and drop columns that you want to print [Video](#)

Field name:

Available Fields

- Contact ID
- Prefix
- Middle Name
- Suffix
- Name
- Certified Coach Level
- Criminal Record Check Year

Fields To Print

- Contact Types
- First Name
- Last Name
- Athlete Level

☐ Open the file when the export completes

2 Format page for printing. Drag to adjust columns widths.
The red line shows the edge of the paper; content to the right of the line is not printed.

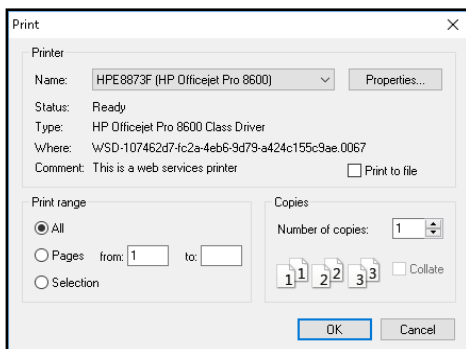
Print Layout

Page Title:

Paper Size: ☐ Landscape (wide) orientation ☐ Scale to fit

Contact Types	First Name	Last Name	Athlete Level
Full Member (2nd	Ed	Olson	Provincial
Full Member (2nd	Brooke	Webber	Provincial
Full Member (2nd	Brian	Sutton	Provincial

The computer print screen will appear, press **OK** to print.



Print

Printer

Name:

Status: Ready

Type: HP Officejet Pro 8600 Class Driver

Where: WSD-107462d7fc2a-4eb6-9d79-a424c155c9ae.0067

Comment: This is a web services printer ☐ Print to file

Print range

☒ All

☐ Pages from: to:

☐ Selection

Copies

Number of copies:

☐ Collate

NOTE: if you want to save the file as a PDF and not print it the choose the PDF option in the name drop own box.

Printing Problems

The printed output appears too small in either Portrait or Landscape because of the limitations of the Sumac system here are two possible solutions

1 Format

Using the 'Fit to Page' option will probably result in very small print. If possible remove some columns from the print layout and try again.

2 Export

If the above option does not work or columns cannot be removed then export the same data to a spread sheet, reformat it there and create a report. Here are the steps to do that. Depending on the spread sheet program you have some of the steps may change slightly but the general process remains the same.

1. In the search box select the members to be included in the report
2. Choose the Export function from the menu
3. Select the column fields required
4. Click Export and save the spread sheet with a file extension of '.txt'
5. Open the spread sheet program and open the file. A dialog box will be presented, click OK (there may be more than one dialog box, just click OK again) and then Finish.
6. The exported data will appear as a spread sheet file. Reformat the page, adjusting column widths, headings, borders and shading as required.
7. Save the out put as a PDF.
8. This file can then be printed or attached to emails.

Practice the export function a few times to fine tune the process.

Community Engagement

This section of the database is currently being considered for implementation and is not yet active. More information will follow as details become available.

In September Clubs will be required to separately report the following.

The number of individuals that registered with your club for events that are NOT Bowls BC affiliated members. This information is collected to help measure the community engagement and use of your facility, as well as public exposure to our sport.

Bowls BC understands that this information may not be tracked accurately. Please provide your best estimates if you do not have access to accurate information. Please only count individuals once (unique participants).

Number of Recreational Participants
Number of Short-Term/Day Event Participants
Number of Volunteers

*Example: **Recreational Events:** If your club has a corporate league where 12 individuals (not regular members) play once per week, report 12 for this event. If you also have a drop-in league where your club had 40 participants (not members) throughout the year, report 40 for this event. The total number of participants (not members) reported for all Recreational Events would be 52 (12+40).*

Recreational Events are typically recurring, such as recreational leagues.

*Example: **Day/Short-Term Events:** When hosting a charity tournament, your club has 50 participants (not members) – report 50 for this event. If you host numerous Day/Short-Term Events, add the number of all participants (not members) for all Day/Short-Term Events and report the total.*

Day/Short-Term Events are typically events that run just one day, of over the weekend.

*Example: **Volunteers:** If your club hosts a charity event and has 25 volunteers (not members) to help with the event, report 25 under Volunteers. These volunteers may be friends, family, members of the community or other organizations. Bowls BC suspects that there are very few volunteers that are not members or social members that are volunteers, so do not be surprised if this number is reported zero.*

Volunteers are typically people that help out during larger events (charity events, Provincial Championships, National Championships, etc.)

Remember, the purpose of this section is to determine how many people are participating in lawn bowling in BC that are not otherwise reported as Bowls BC affiliated members. **Please report total amounts for the whole season to date.**

Glossary of terms

SUMAC terminology	Bowls BC terminology
Contact	Member
Contact Type	Membership Type
Segment	Club name

Exporting to a spread sheet.

1. Perform a search for the members data that you want to output to a spread sheet

Contacts

- New
- Add To Contact
- Duplicate
- Delete
- Export
- Print
- Special Editing
- Mailing
- Email
- Analyze & Report
- Reload

Field Search

List Builder

Search Builder

Search Type: Show All

General Control: Search all records. Show only matching ones.

Load

Save

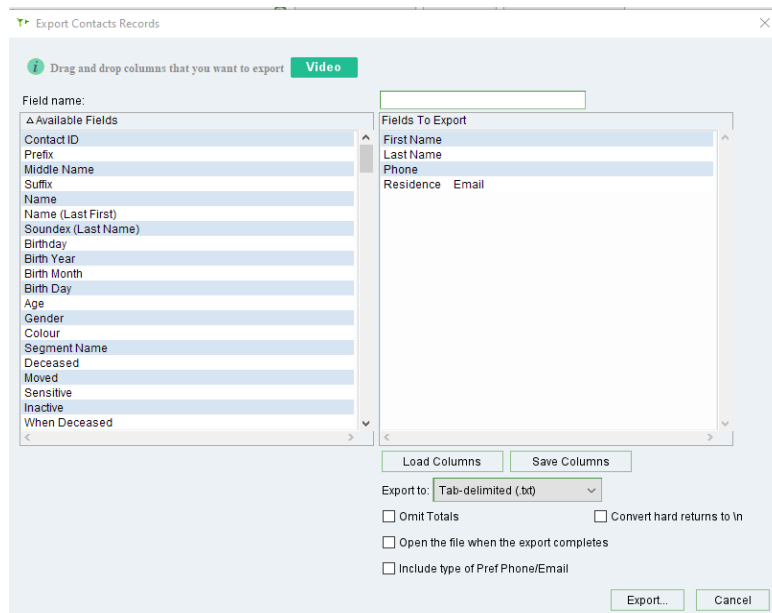
Search

Clear

Undo

Expansion

Δ First Name	Δ Last Name	Δ Phone	Δ Residence Email
▼ Brian	Sutton	555-123-1234	BSxwd815@gmail.com
▼ John	Black	555-123-1666	JBlack-1212@gmail.com
▼ Max	Smith	555-123-1235	XXz5-1212@gmail.com
▼ Jim	White	555-123-1236	JW-1212@gmail.com



2. Select Export from the menu on the left
3. Add more fields by dragging a field name from the “Field Name” box on the left to the “Fields to Export” box on the right. Then click Export. You will now save the file as a csv type.
4. Open your spread sheet program and open the exported file. You will get a dialog box something like the one shown here. (Different spread sheet programs will have slightly different format to this dialog box, but it is essentially the same. No need to change anything on this dialogue box, just select OK.

Text Import - [Contacts.csv]

Import

Character set: Unicode (UTF-8)

Language: Default - English (Australia)

From row: 1

Separator options

☐ Fixed width

☒ Separated by

☐ Tab ☒ Comma ☐ Other

☐ Semicolon ☐ Space

☐ Merge delimiters

Text delimiter: "

Other options

☐ Quoted field as text

☐ Detect special numbers

Fields

Column type

	Standard	Standard	Standard	Standard
1	First Name	Last Name	Phone	Residence Email
2	Brian	Sutton	555-123-1234	BSxwd815@gmail.com
3	John	Black	555-123-1666	JBlack-1212@gmail.com
4	Max	Smith	555-123-1235	XXz5-1212@gmail.com
5	Jim	White	555-123-1236	JW-1212@gmail.com
6				
7	Totals			

5. On

the

file

is

o

p

e