



Membership Reporting System

Start up Guide

May 2026

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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 database 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 get started with the many features of the Bowls BC membership database. The membership database 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 is a button on each page that takes you to the CODY AI Help for SUMAC. Click on  and select the “Open in Web Browser” button. The help is generic and does 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 refer to the detail in the Bowls BC Membership Reporting Training Manual (“Training Manual”) or contact Bowls BC at Sumac@BowlsBC.com for assistance.



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Installing the membership database system.

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

Follow the instructions for your computer's operating system. If you are asked for an organization, use "Bowls BC" (note the space).

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 FUN009. Note that view only access does not currently permit the use of export or email functionality.

You will need to get a club director to authorize the request and to agree the terms and conditions. Please request this form from Sumac@BowlsBC.com

Data Security

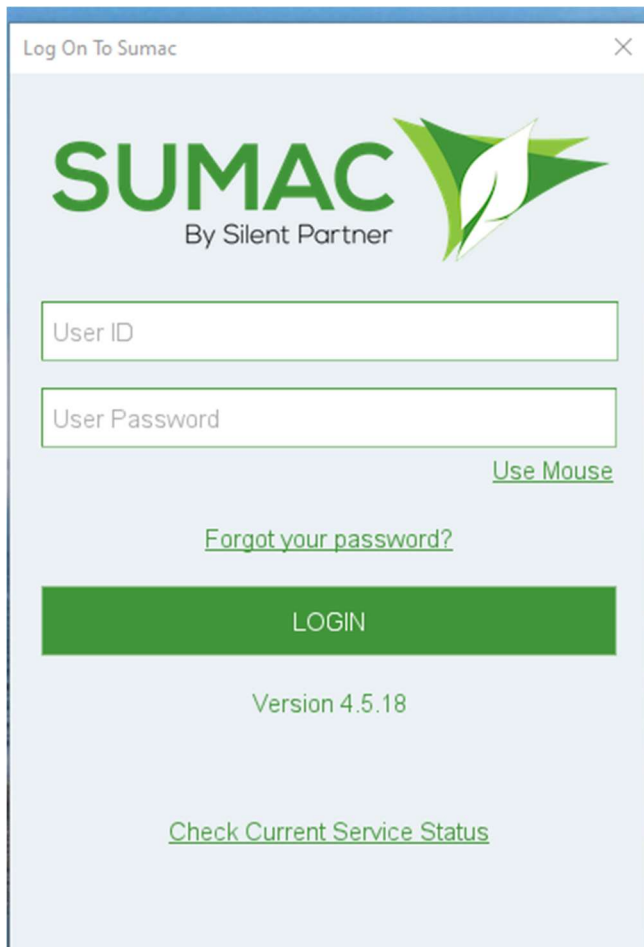
Your club data resides on a shared database with all other Bowls BC clubs data. Your data is stored in a separate segment on the database so that only your club has access to it. Your ID and Password ensure that you only have access to your club data and you cannot see or modify any other clubs data.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

Log on To Sumac

You will need an ID and Password that can be obtained by completing form FUN009 and sending it to Sumac@BowlsBC.com

When you click on the Sumac desktop icon, the following will open in your browser. Switch to your browser if it doesn't do so automatically.

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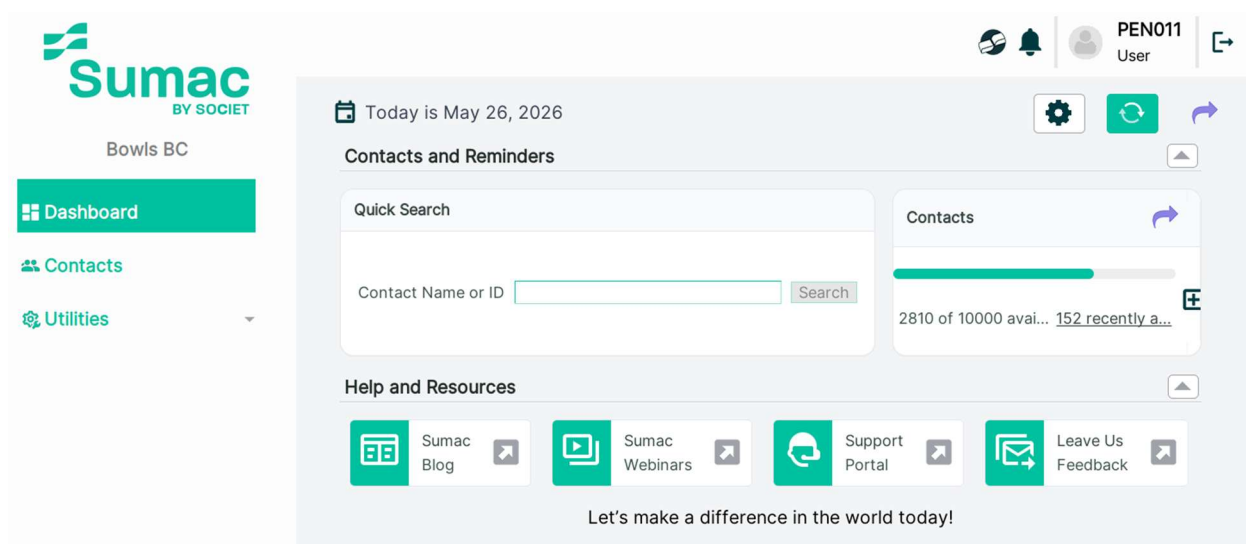
The screenshot shows a web browser window titled "Log On To Sumac". The main heading is "SUMAC" in large green letters, with "By Silent Partner" in smaller text below it. To the right of the text is a green leaf logo. Below the heading are two input fields: "User ID" and "User Password". To the right of the "User Password" field is a link that says "Use Mouse". Below the input fields is a link that says "Forgot your password?". Below that is a large green button with the text "LOGIN". Below the button is the text "Version 4.5.18". At the bottom is a link that says "Check Current Service Status".

Enter your ID and Password.

If you are a first time user, follow the instructions to verify your identity. If you are asked for an organization, use "Bowls BC".

You may be required to update your password. The new password should be a minimum of 8 characters, including letters, numerals and a special character such as "!".

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A screen similar to the above 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 in the Training Manual.

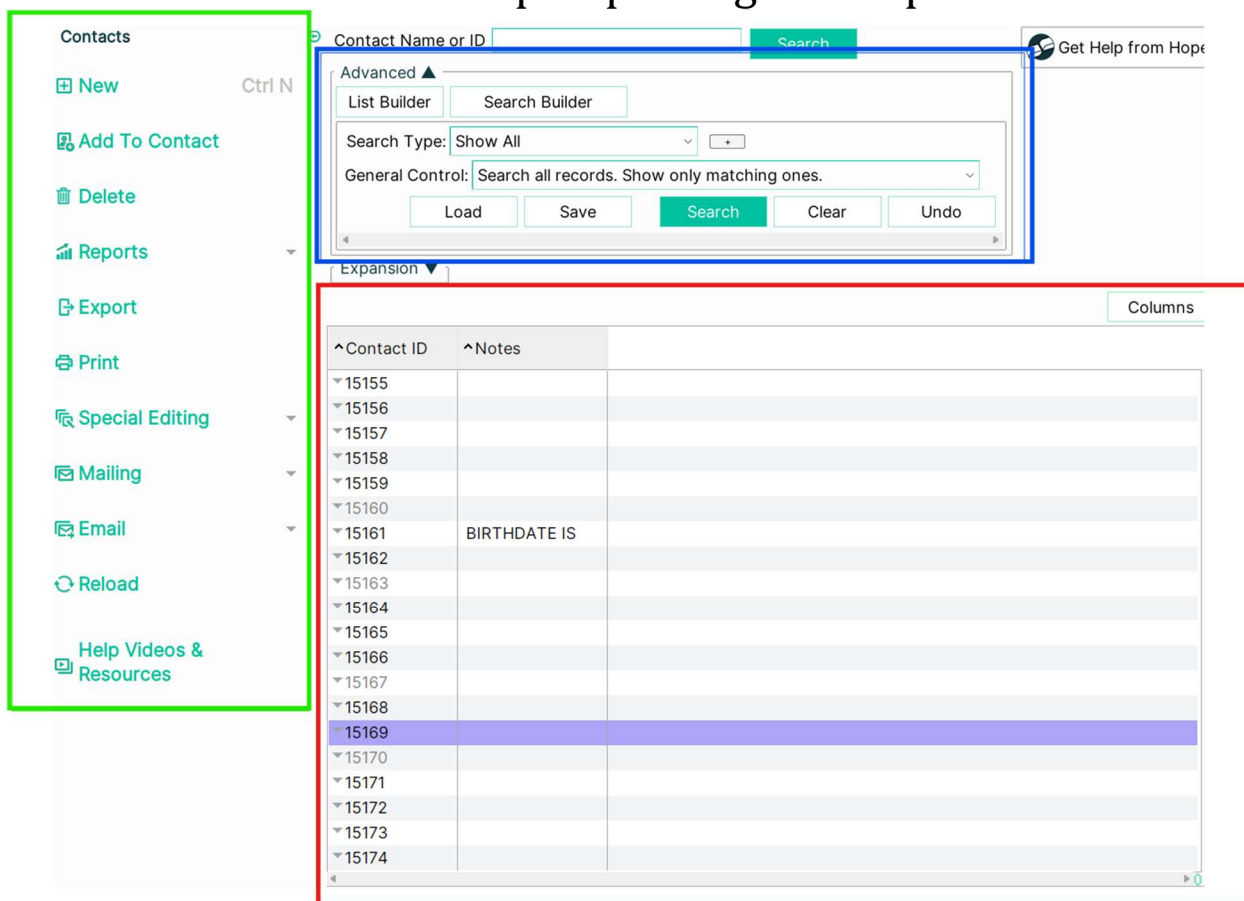
The Contacts search screen and main menu

Click on Contacts. 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** (Red area) below that.

Note that if you are converting to Sumac from another system, such as spreadsheets, then the Sumac Admin may be able to assist you by doing a bulk upload of your data. Contact Sumac@BowlsBC.com for more information.

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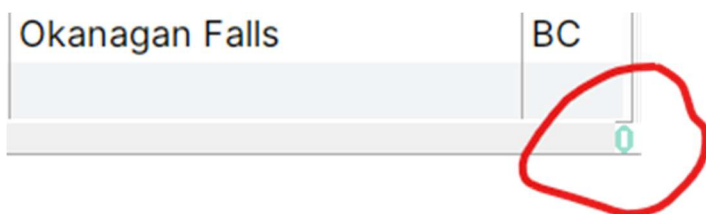


You can rearrange the displayed columns or **add** or **remove** them by clicking the “Columns” icon at the top right of the search results section. Note when you remove a column from the display, it does not affect the data contained in that column, and you can always put it back!

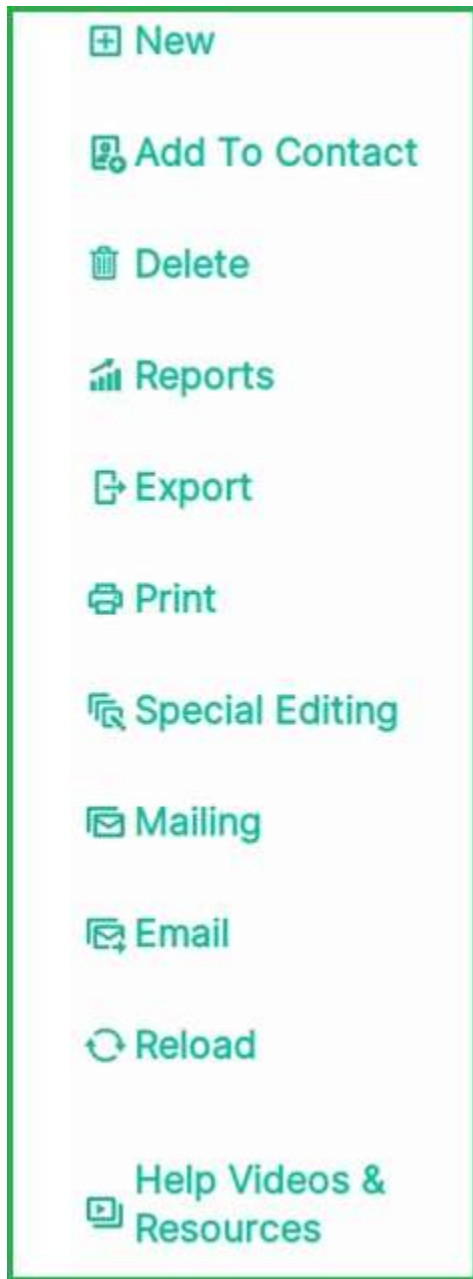
You can sort on one or more columns by clicking the column header. E.g. to sort on first name within last name, click on the column header ‘First Name’ and then on the column header ‘Last Name’.

Scrolling across the search results section will reveal additional columns.

If you want to freeze the left hand columns while you scroll right, look for the brackets at the bottom left and drag them to where you want to freeze.



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” and is where you add the required information on a new member. See page 13 for more information.



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Add to Contact (Not used by Bowls BC)

Currently Bowls BC does not support any of the options in this pop up screen.

Duplicate

This menu option is optional. If you don't see it and want it, contact Sumac@BowlsBC.Com. You must select (click on) 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. Use with care as the deleted record cannot be retrieved.

If you are wanting to remove a member who is no longer active, we recommend you use the "Inactive" switch on the Basic page in Edit which removes the record from normal processing and greys the record out on the search results section so you know it is inactive. Then you can always reactivate a member if they rejoin and you still have a record of their contact details.

Export

This option allows you to export data on all or selected members to a spread sheet. Exporting does not remove any data from the database. This option is described in greater detail in the training manual. It is useful for quickly creating the annual ViaSport required report, which is described in a separate document.

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 the training manual. SUMAC also provides a very good video explaining how to use this option.

Special editing

The basic option presented here allows searching the database and finding potential duplicates.

Mailing

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

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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 Sumac@BowlsBC.com to get this set up. There are SUMAC online tutorials that provide excellent training on how to use the email system as well as a separate document addressing emailing.

Note that if you change your email account password you will need to request the Sumac Administrator to update it in Sumac as well.

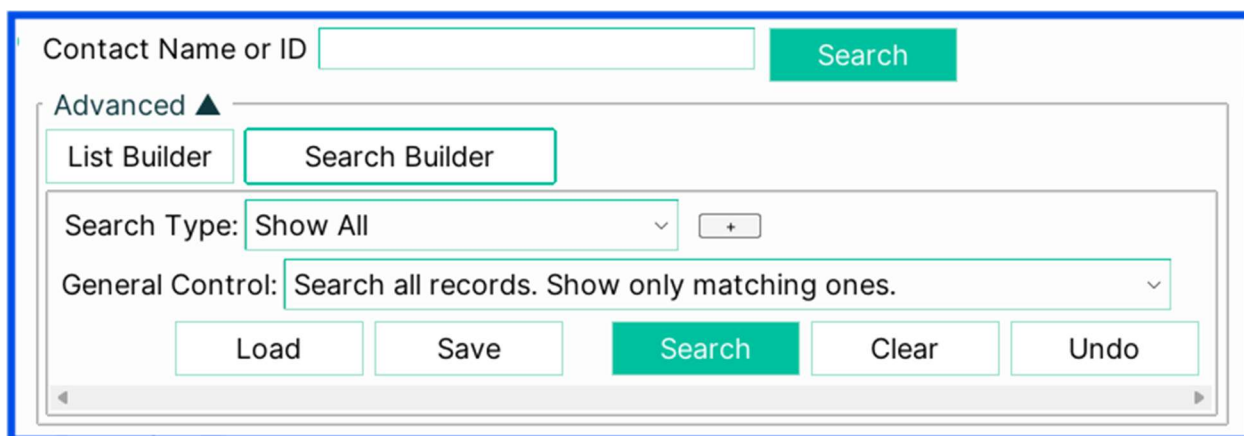
Reload

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 screenshot shows a web-based search interface. At the top, there is a text input field labeled "Contact Name or ID" and a green "Search" button. Below this is a section titled "Advanced" with a dropdown arrow. Inside the "Advanced" section, there are two buttons: "List Builder" and "Search Builder". Below these buttons, there is a "Search Type:" dropdown menu currently set to "Show All", followed by a "+" button. Below that is a "General Control:" dropdown menu with the text "Search all records. Show only matching ones." At the bottom of the "Advanced" section, there are five buttons: "Load", "Save", "Search" (in green), "Clear", and "Undo".

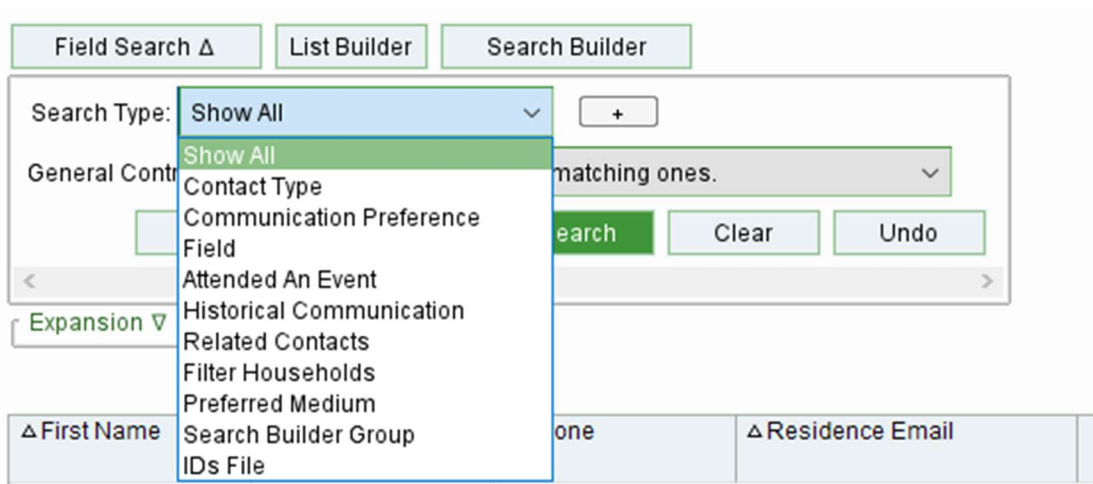
To search on a name only, enter all or part of the name in the "Contact Name or ID" search box and click "Search" alongside it. All names containing the entered characters will display and you can select the one you want from the shortened list.

The more complex 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.

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

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

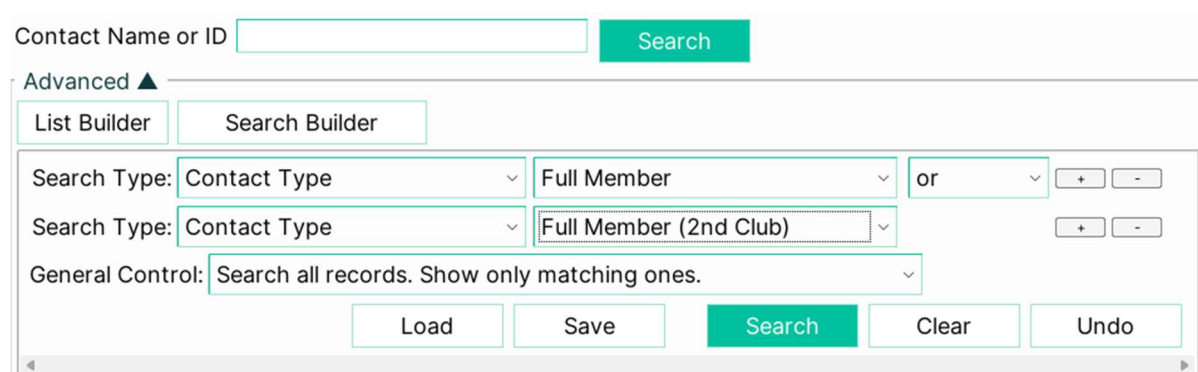


The screenshot shows the 'Search Builder' tab selected. The 'Search Type' dropdown is set to 'Show All', and its menu is open, displaying the following options: Show All, Contact Type, Communication Preference, Field, Attended An Event, Historical Communication, Related Contacts, Filter Households, Preferred Medium, Search Builder Group, and IDs File. The 'General Control' dropdown is set to 'Search all records. Show only matching ones.' The 'Search' button is highlighted in green.

Of these options only 2 are used by Bowls BC - Contact Type and Field

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

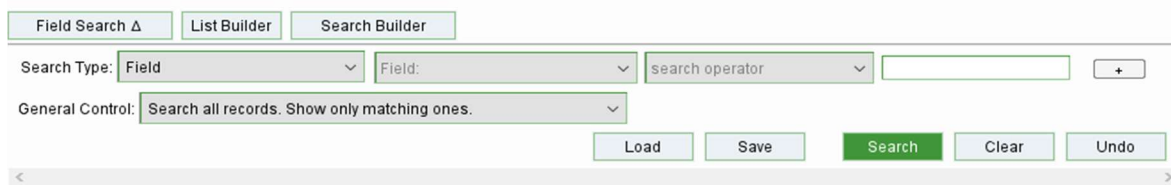
Here is an example of filtering the members to select only Full Time Members and Full Time Members (2nd Club)



The screenshot shows the 'Search Builder' tab selected. The 'Search Type' dropdown is set to 'Contact Type'. The first search criterion is 'Full Member' and the second is 'Full Member (2nd Club)'. The 'General Control' dropdown is set to 'Search all records. Show only matching ones.' The 'Search' button is highlighted in green.

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

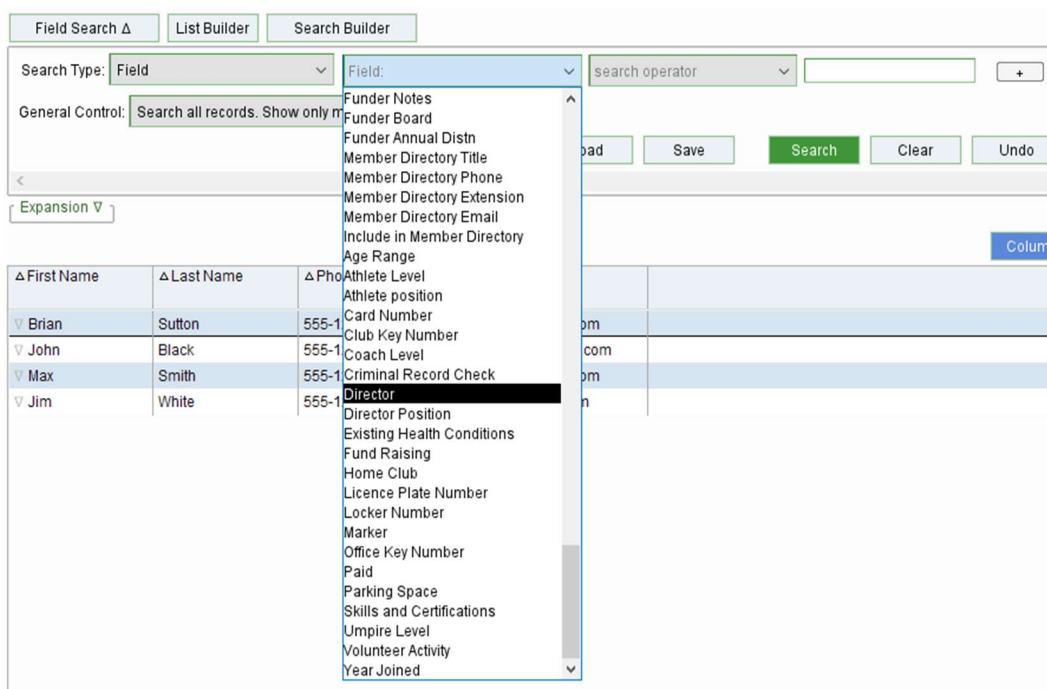
If you want to filter on any other field in the database select the Field option.



The screenshot shows the 'Search Builder' tab selected. The 'Search Type' dropdown is set to 'Field'. The 'General Control' dropdown is set to 'Search all records. Show only matching ones.' The 'Search' button is highlighted in green.

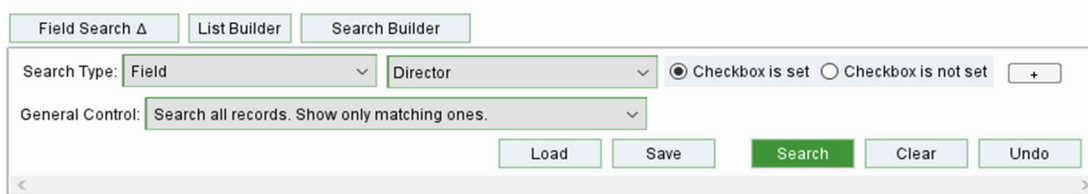
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For example to filter club directors only select “Director” from the second field (from the left) drop down list,



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

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 software. The 'Field' dropdown menu is open, displaying a list of fields. The 'Director' field is highlighted. The 'Search Type' is set to 'Field'. The 'General Control' is set to 'Search all records. Show only matching ones.' The 'Search operator' is set to 'AND'. The 'Load', 'Save', 'Search', 'Clear', and 'Undo' buttons are visible.

As this field is a check box you will have two further options displayed. See screen shot below. If the checkbox is set then the field is “true”. For example, if “Director” is not set, they are not a Director, or if “Inactive” is set then they are not active members.

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”.

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The columns displayed can be changed by selecting the Columns icon on the right hand side.

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.
[Learn More](#)

☒ 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 A...	Contact ID	Name (Last First)	Pref Phone	Pref Street A
No contacts match the name or email address you have entered					

The following fields are mandatory

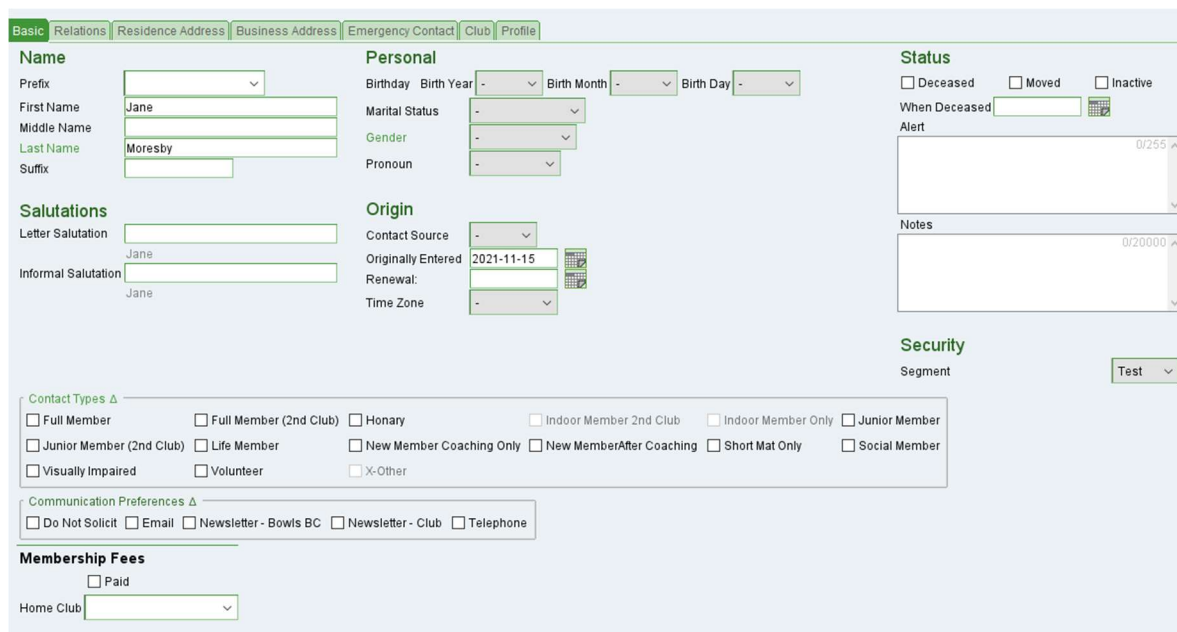
1. First name
2. Last name

The other fields are optional

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.

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This 'Basic' page is the first of a set of input screens, which are named in a line of tabs, 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 and Attachments tabs are not used by Bowls BC or Clubs and are not described below.

The "OK" and "Cancel" buttons can be clicked at any time to exit back to the Contacts screen. The "OK" button saves all your changes after checking for validity and completeness, while the "Cancel" button discards all the current changes.

Basic Tab.

This screen contains basic member profile data. You may need to scroll down to see all fields.

The field Segment (below Security) is your club's name. This field cannot be changed.

The Bowls BC Mandatory fields are:

1. First name
2. Last name
3. Gender
4. Contact Type (Member Type) –
 - a. Only select ONE type of membership. For example, do not select both "Full Member" and "New Member", choose one or the other.
 - b. 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

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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

- c. Life members are divided into FULL and SOCIAL to facilitate the calculation of affiliation fees.
 - d. Volunteers are not Club members but provide volunteer services to the Club.
 - e. Other – This is a special Membership Type used by some clubs. These are non-Bowling memberships that use the club facilities. If your club requires this option contact the Systems Administrator at Sumac@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 a member has paid Bowls BC affiliation fees at more than one club, then they should designate which club is their Home Club. Their Membership Type would then be Full Member (2nd Club) at one Club and "Full Member" at the other. Note that currently both clubs pay affiliation fees for these members.

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. Contact Sumac@BowlsBC if you need assistance with a bulk reset before the new membership year.
- 2. 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.

Addresses Tab

Residence Address Sub-Tab

All fields on the page are optional except Postal Code. However if the emailing function is to be used then the Email field should be entered. A second email can be entered if the person has a club specific email address (e.g. for membership secretary). All information on this page can be included in reports and emails.

Club Business Address

All fields on the page are optional and are used to record contact details if they are a Sumac Admin for this Club. All information on this page can be included in reports and emails.

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Emergency Contact Sub-Tab

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

Attachments Tab

This is optional

Club Tab

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, 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.

Note that is required that the Club hold a valid Criminal record Check for every Director and the details should be entered here as soon as they are available.

Profile Tab

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

1. Year Joined This Club – Optional – select year from drop down list
2. BC Bowls Mandatory fields
 - a. Year Started Bowling – select field from drop down list
 - b. Athlete Level – Select level from drop down list
 - c. Age Range – If you have not entered the full Birthdate then select from the drop down list. If you have, this field is optional.
 - d. Sport - this is used for ViaSport reporting. Select “Lawn Bowling” for everyone.
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 and the file number. A reminder that a current CRC is required for a coach.
5. Umpire – Complete this section if member is an umpire
 3. Umpire Level – select from drop down list
 4. Marker – optional
6. Volunteer and Fund Raising – Optional unless the member is a Club Sumac Admin in which case that choice needs to be checked.
7. Vaccine – Optional. This field can be used to indicate which members have received a full Covid vaccination

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Editing and Updating Member Data

Either search on a name or sort the Last Name column and locate the record that you want to update. When you see it, double click on the name and the current data for that member will display in the same type of screens as for a New member.

Edit the items you want and then click on OK to save it, or on cancel if you want to abandon the changes.

DO NOT EXIT FROM SUMAC WHILE YOU HAVE A CONTACT RECORD OPEN FOR EDITTING AS IT WILL LEAVE THE RECORD LOCKED AND UNAVAILABLE. IF YOU GET A RECORD LOCKED ISSUE AND YOU ARE SURE NO-ONE ELSE IN YOUR CLUB IS EDITTING IT – CONTACT SUMAC@BOWLSBC FOR ASSISTANCE.

Note that there is a bulk update that can be run by the Sumac Administrator to reset the 'Paid' and 'Amount' fields at the end of a membership year. Email Sumac@BowlsBC.com with the request, the date to do the update and the name of the Club requesting the update. Note that once the bulk update is done it cannot be reversed.

Printing and Export

These are covered in the Training Manual

Where to go from here

Once you have reviewed this document, familiarize yourself with the menu structure and bringing up individual records. Any changes you make to a record will be discarded if you select "Cancel" instead of "OK". Familiarize yourself with the columns available. Practice changing the columns displayed on the main Contact screen and then experiment with sorting with the different columns.

Review the other available documents, especially the one on using email from Sumac. It is one of the most useful functions. See if you can send an email to yourself!

If you have questions or need assistance email Sumac@BowlsBC.com

Glossary of terms

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

The End..