Membership Reporting System

Training Manual

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 spreadsheet system with an easy to use and readymade system that fully supports and streamlines their Membership management and communication requirements.

How to use this manual

This manual describes how to use the many features of the Bowls BC membership system. 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 "Help" ( ) buttons linked to each page that take you to the SUMAC site. The "Help" is generic and does not have Bowls BC terminology nor exact examples. However, it is 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 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 ensures that only you have access to your club data and you cannot see or modify any other club's data. The SUMAC software captures the ID of the person that added or made changes to Membership data.

Who Has Access to Your Data and for What Purpose

Position	Security
Club Membership Director and other authorized club member	Can View, Add and Change their Club Member Data Can inactivate Member Data Can reactivate Member Data Can Change Director records in Club Organizations
Bowls BC Membership Administrators	Can View all Clubs Member Data. On request from club 1. Can Update membership status during annual reset of Members Data 2. Can Delete Specific Member Data 3. Can Purge old non-member data from Database Can View Club Directors May summarize data as requested by Bowls BC Directors

Privacy of Membership Data held in the Membership System

All parties having access to the Membership System agree to conform to the Bowls BC Policy #E7 – Privacy and, in addition, agree:

• To never share IDs or passwords with anyone. If more than one person is responsible for managing the membership data, then all such persons must be approved for their own ID and password.

• Owners (applicants) of IDs and passwords must notify the SUMAC Administrator at Bowls BC immediately when their role changes and they no longer require access to the Membership System.

• Membership data identifying a member (name, phone number, postal address or email, etc.) shall not be shared with any person or organization without the express approval of the member.

• Anonymous data used for statistical purposes in the operation of the Club, region, or Bowls BC does not require a member's approval.

Important Dates - Affiliation Fees and Membership Data

Before June 1: give Clubs instructions for information that MUST be collected (via Sport report template) so they can do it as members register.

June 1: current year's fees are due to the Treasurer. Clubs advised of the amount in the previous year, in early September.

June 30: Bowls BC President sends an email to all clubs through the District Reps to request club data:

(i) membership demographics as of July 15th of the current year (to be used in the algorithm that calculates membership dues for next season), and

(ii) the number of scorecards and membership cards they'll need for next season (to guide the printing order).

July 31: deadline to submit the requested membership data.

August 31: after all clubs have submitted their numbers, Club membership fees for the following year are calculated.

September: Clubs fees for the subsequent year are invoiced based on the current algorithm that incorporates the current year budget, as approved at the March AGM, and a rolling 3-year average (e.g. 2024-25-26) to minimize fluctuations of membership numbers.

GETTING STARTED

Installing the membership database system.

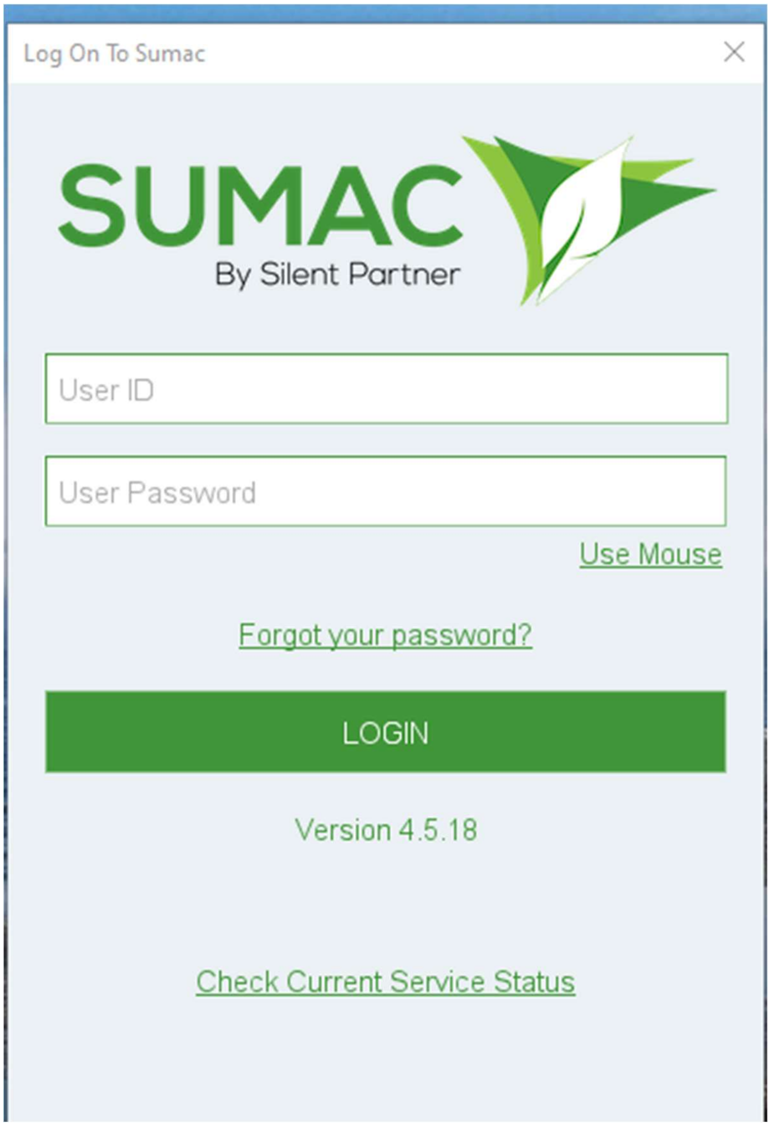
Go to https://www.sumac.com/install/

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

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. You will need to get a club director to authorize the request. Please request this form from Sumac@bowlsbc.com
Note that the request can specify either full view and editing function or just view only functions. The view only functions are useful for someone who is just using Sumac for communications or reports but not adding or editing members' data.

Log on To Sumac

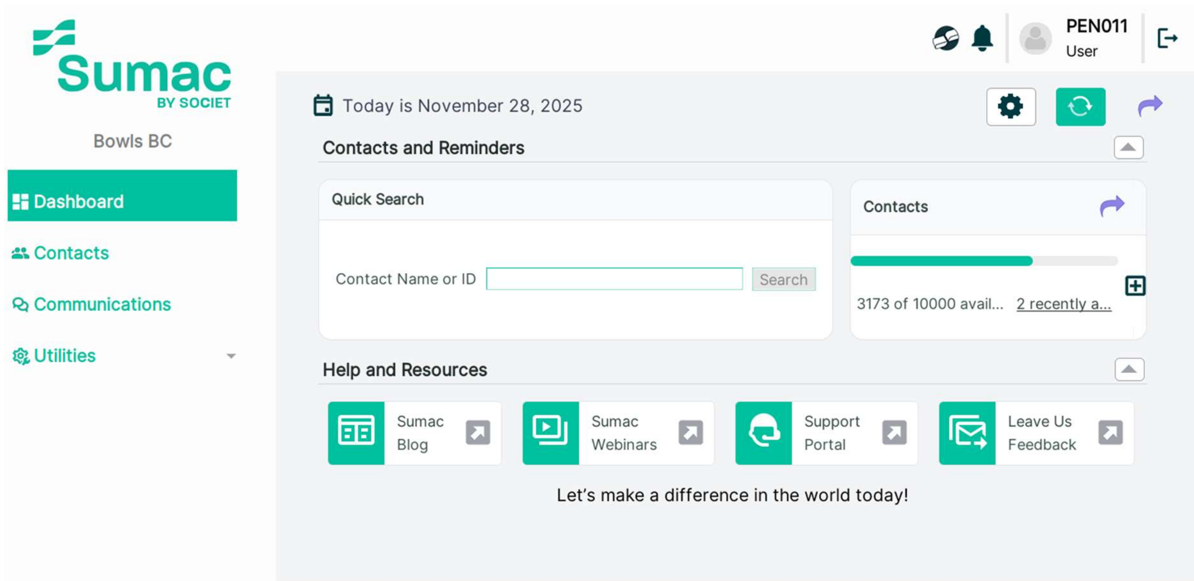


Enter your ID and Password

A screen similar to the following will be presented.

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

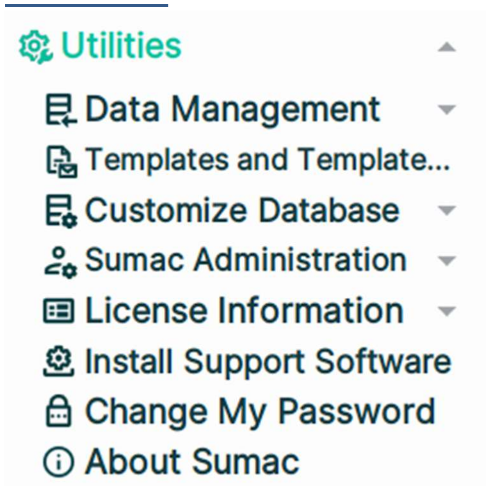
You may be required to update your password. The new password should be a minimum of 8 characters, including letters, numerals and a special character such as "!".



On the left of the page there are four items on 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, see next section.

UTILITIES



The sub menu items should only be used by Bowls BC except for:

1. Change my Password (you should do this on a regular basis)

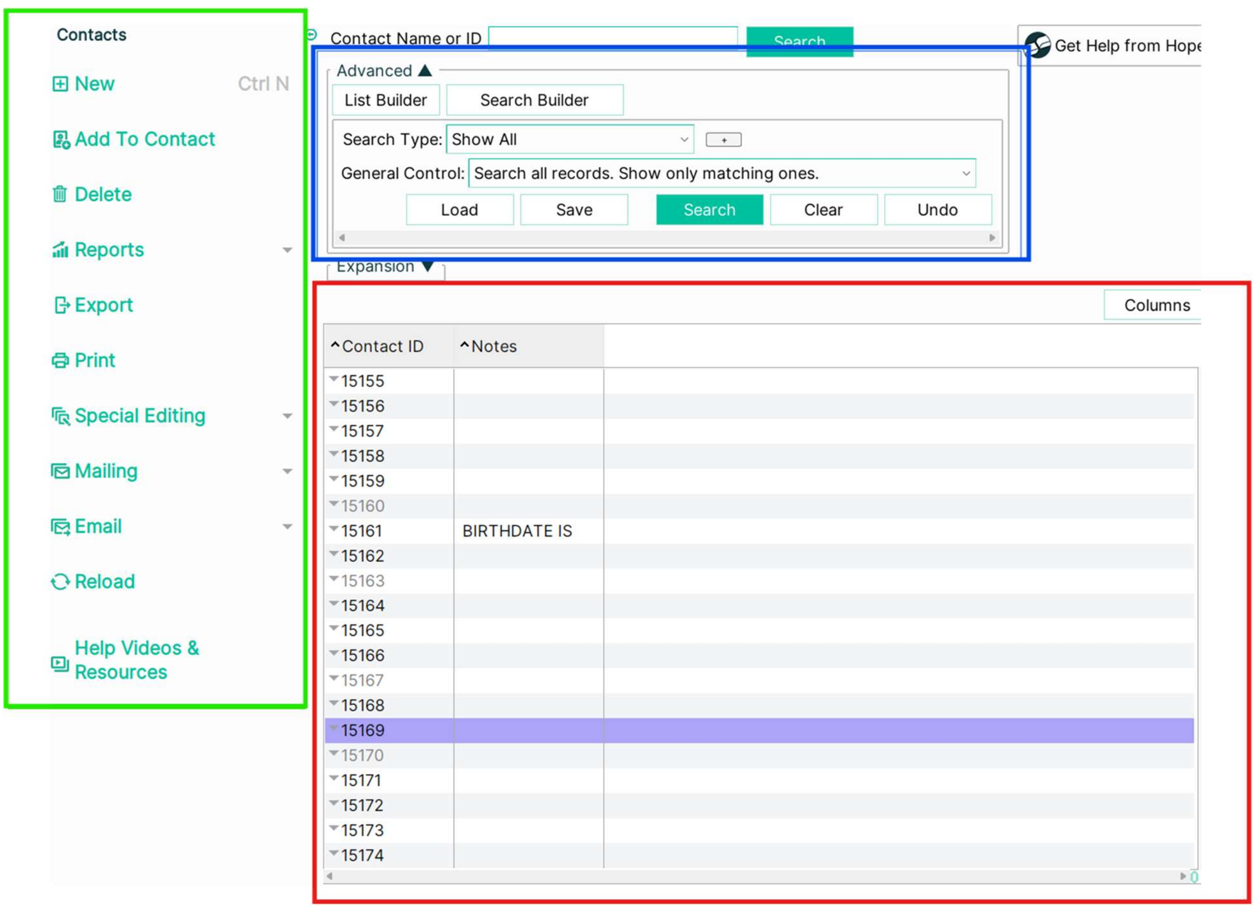
2. Sumac Administration – Appearance – where you can change the font size and colours of text displayed. This should not be necessary unless the user has problems with the standard colours and fonts.

CONTACTS

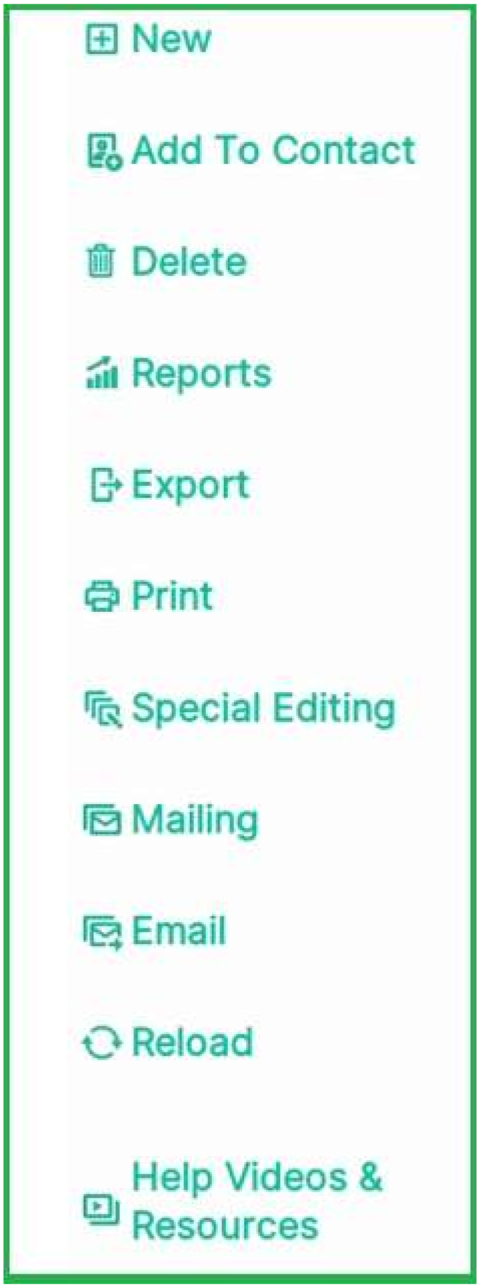
The Contacts search screen and main menu

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.



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)

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 or someone else living at the same address. Selecting this menu option presents the details of the 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.

Reports

This menu option has a number of pre-programmed reports. They tend to be generic and of limited use, although "Quick Count" has utility. Start by selecting the records you want to report on then run the report you are interested in. There are more details below.

Export

This option allows you to export data on all or selected members to a spreadsheet. Exporting does not remove any data from the database. This option is described in greater detail below. It is useful for quickly creating the annual ViaSport required report, which is also 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 below. 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 and templates. You can use mail merge codes to personalize documents and extract members data. An example is illustrated below. You can also find excellent SUMAC videos on this subject.

Email

This section of the menu allows you to send personalized emails from your email account linked in Sumac to all or selected groups of members. For example, you could send an email just to coaches or juniors or everyone. You can also use codes to extract data from the database specific to the person the email is being sent to – for example, first name or membership type. See the section on Mailing for more information on this.

The email system can be set up for each club, preferably using a Gmail account or you can use a generic email 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.

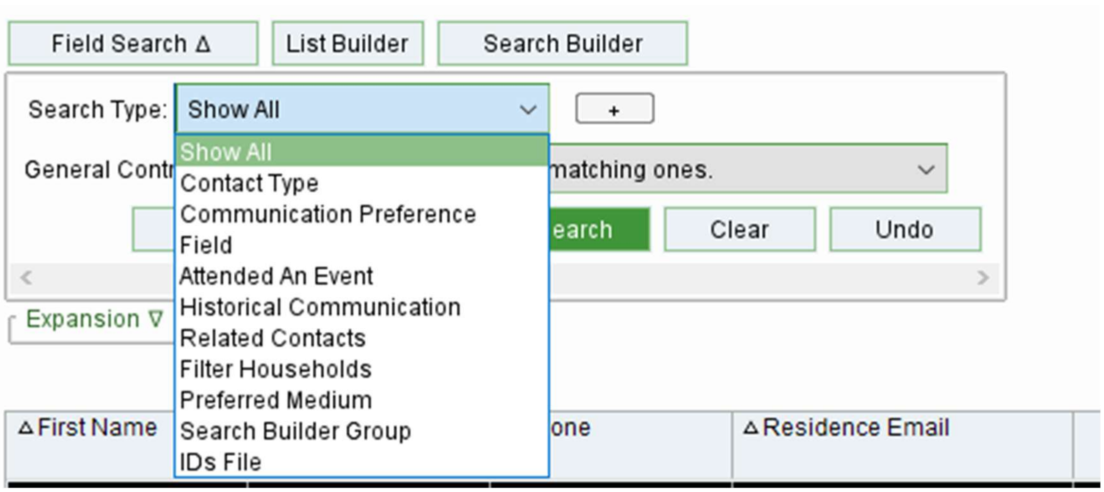
To search on a name only, enter all or part of the name in the Contact Name or ID search box and click "Search" alongside it. All names containing the entered characters will display and you can select the one you want from the shortened list.

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.

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

To just search on a single member, put their name (last, first or both) in the Contact Name or ID field above and click the search button alongside it.

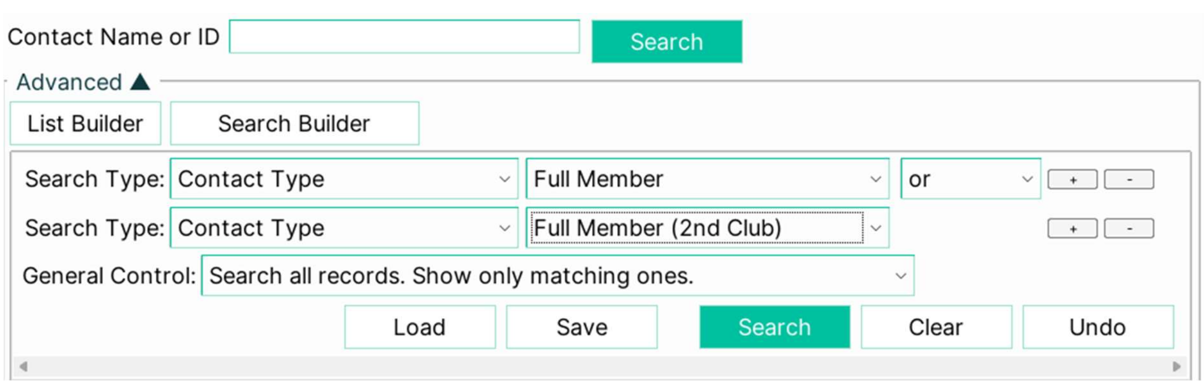
Selecting the Show All list will present you with the following drop-down list.



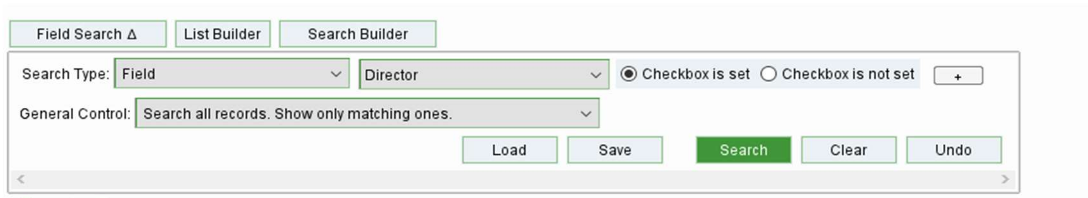
Of these options only 2 are used by Bowls BC: "Contact Type" and "Field".

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

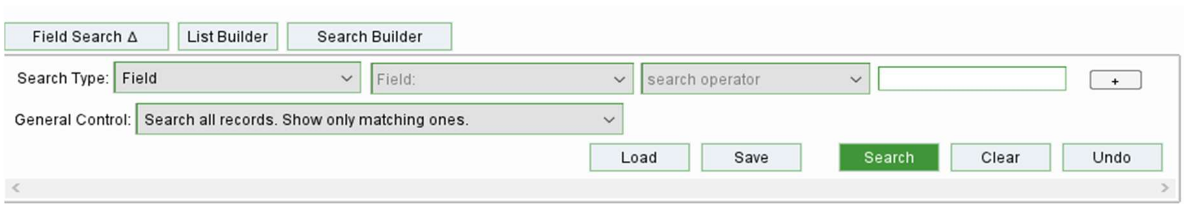
Here is an example of filtering the members to select only Full Members and Full Members (2nd Club). To get the second criteria boxes, select the "+" sign on the right hand side.



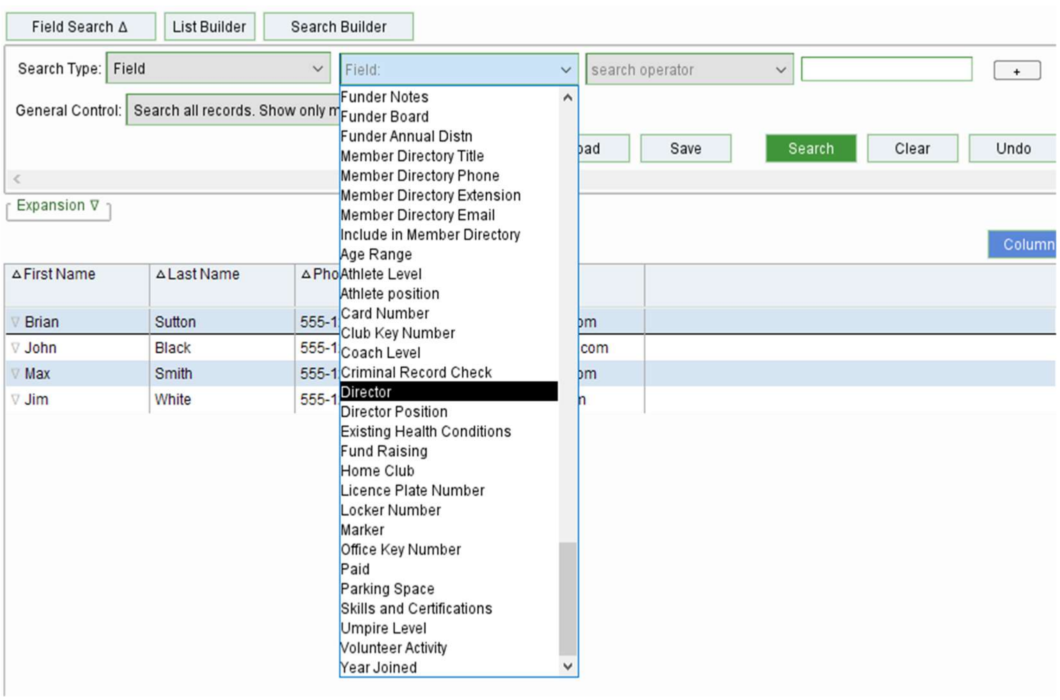
Then click the green Search button to display the results below in the Search Results area.



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



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



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.

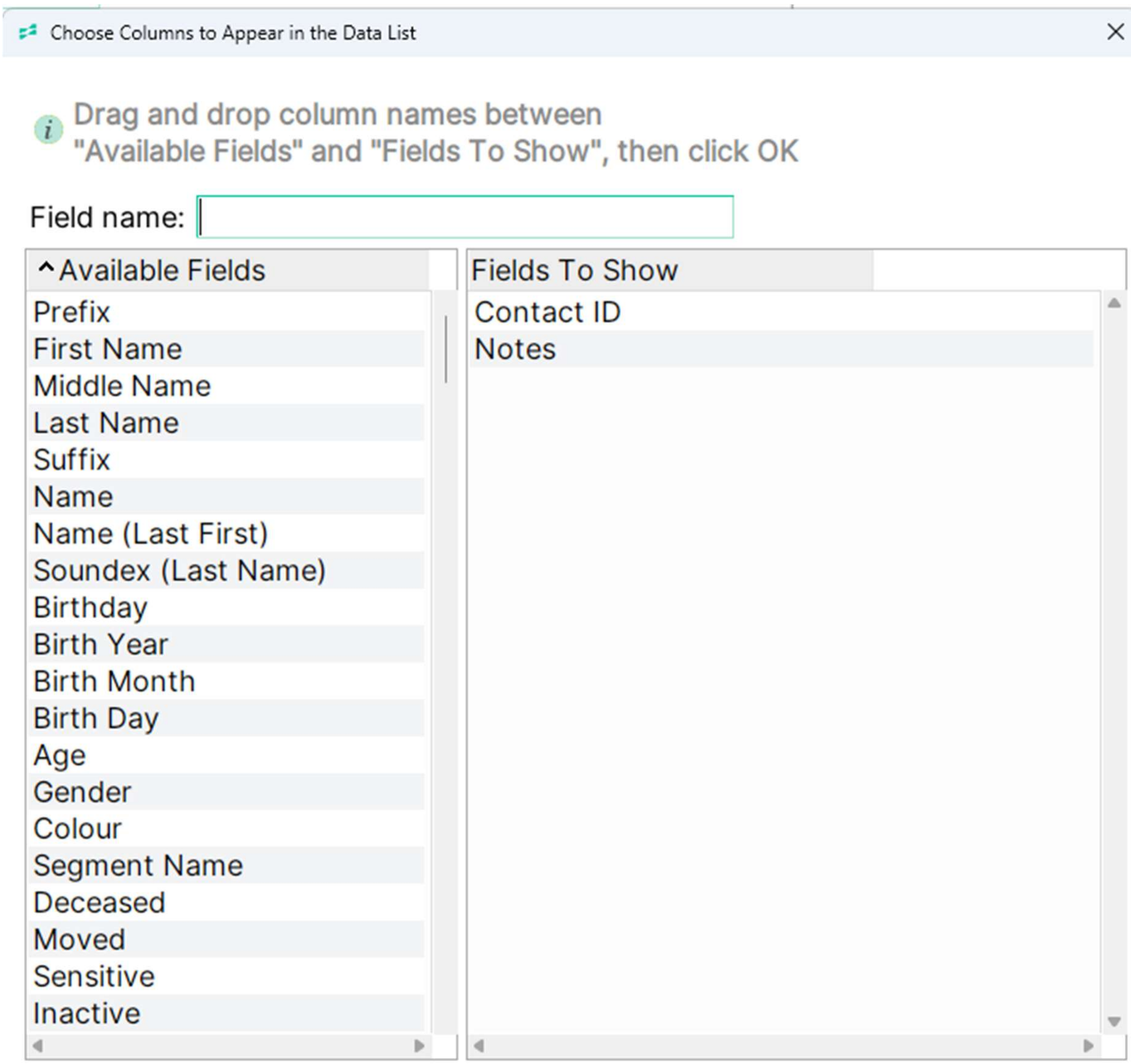
The option "Checkbox is set" is the default choice, so now click Search to display all the Club directors.

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

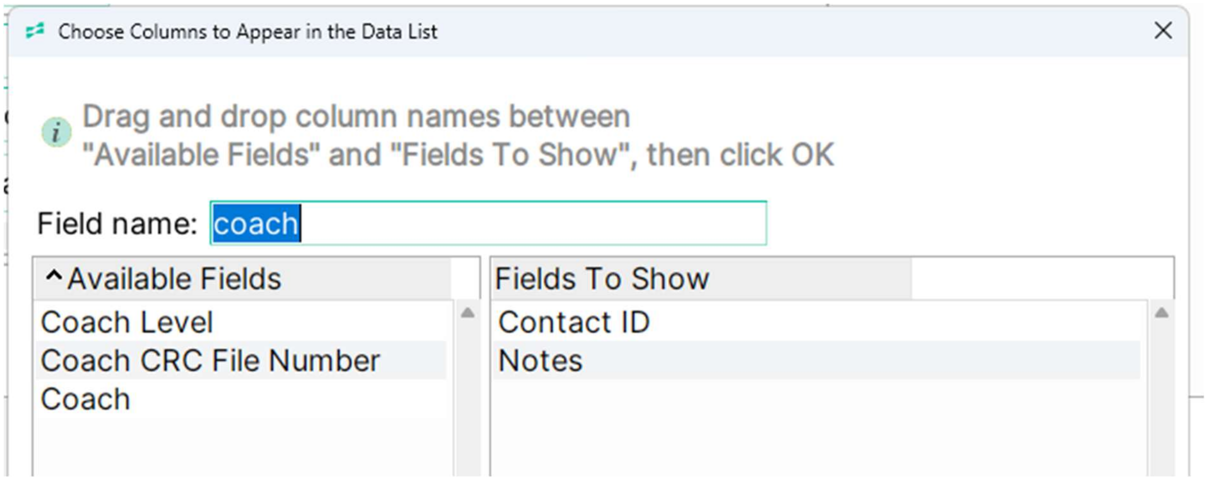
The Search Results Section

This section (outlined in red in the screenshot on page 9) shows the results of the search based on the criteria entered in the “Search Criteria Section”.

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!



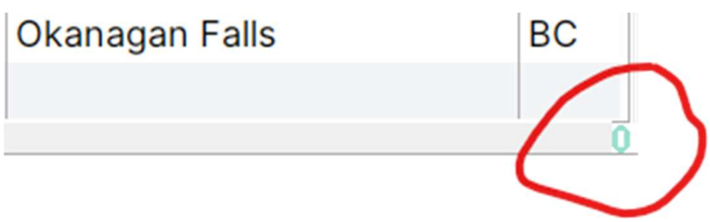
You can shorten the list of fields by putting all or part of the name of the field you are looking for in the field name box. For example entering “coach” reduces the list to:



You can then drag and drop the ones you want.

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'.

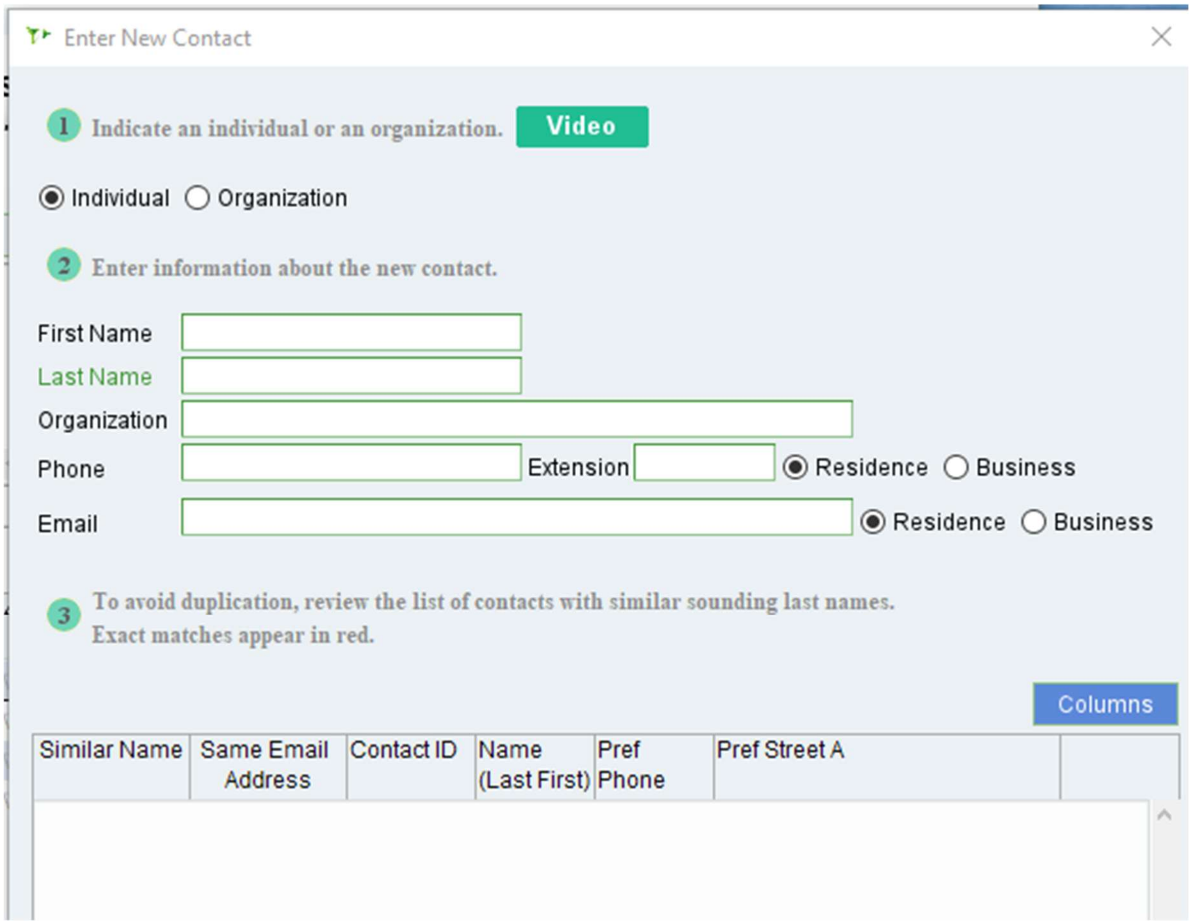
Scrolling across the search results section will reveal additional columns.
If you want to freeze the left hand columns while you scroll right, look for the brackets at the bottom left and drag them to where you want to freeze.



Adding a new member.

Select New from the menu

The following screen is presented.



The following fields are mandatory:

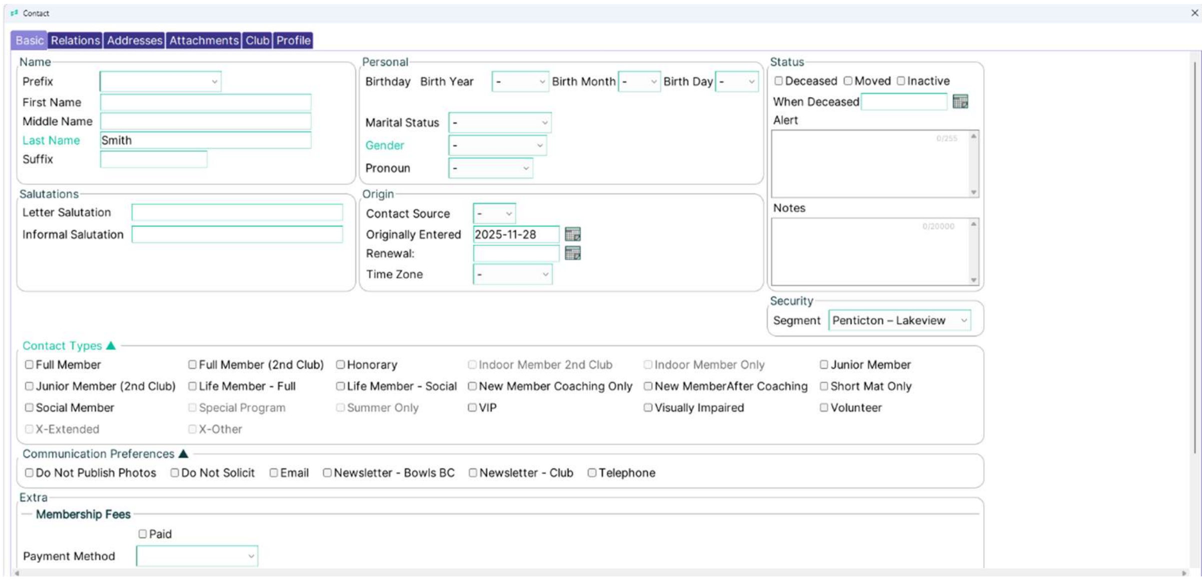
1. Last name

The following fields are optional but are strongly recommended:

1. First name
2. Phone
3. Email

If the name(s) matches a member already registered in your club it will be displayed in the area below.

Click “OK” at the bottom of the screen to present the Member screens. See next screen shot.



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.

This tab contains basic member profile data. Note that for most users the fields extend below the bottom of the screen. Make sure you 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 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 should be set off at the beginning of every membership year. Contact Sumac@BowlsBC if you need assistance with a bulk reset before the new membership year.
2. Amount – This field can be used to indicate paid club fees. This field should be reset at the beginning of every membership year. Contact Sumac@BowlsBC if you need assistance with a bulk reset before the new membership year.
3. Payment Method – This field can be used to indicate how the member has paid club fees, for example, cash, eTransfer or cheque. This field should reset at the beginning of every membership year. Contact Sumac@BowlsBC if you need assistance with a bulk reset before the new membership year.
4. 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

Residence Address

All fields on the page are optional apart from Postal Code. If the Post Code is not known, the Club post code can be used until it is, but this is discouraged. However, if the emailing function is to be used then the Email field must be entered. 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.

Emergency Contact

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

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 (or equivalent elected members of the Club Executive Board).

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.

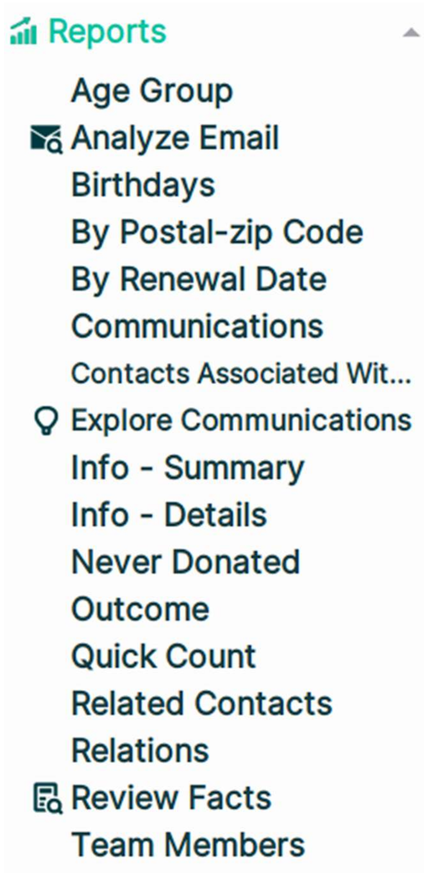
Note that is required that the Club hold a valid Criminal record Check for every Director and the details should be entered here as soon as they are available.

Profile

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

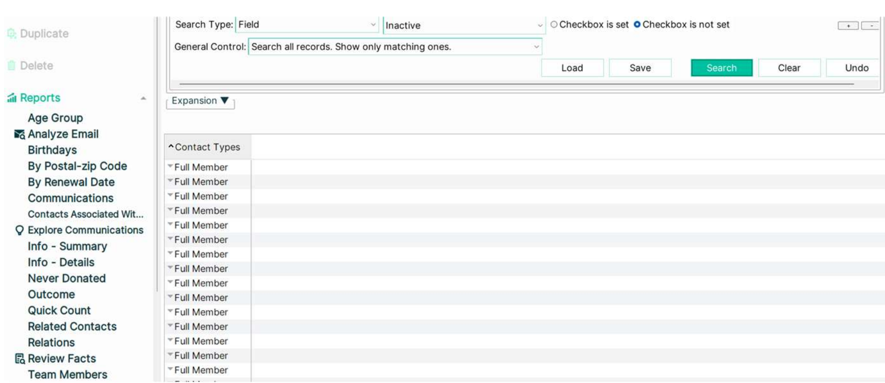
1. Year Joined This Club – Optional – select year from drop down list
2. BC Bowls Mandatory fields
    a. Year Started Bowling – select field from drop down list
    b. Athlete Level – Select level from drop down list
    c. Age Range – Select from drop down list
    d. Sport - this is used for ViaSport 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
    e. Coach Level – select from drop down list
    f. 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
    a. Umpire Level – select from drop down list
    b. 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. Existing Health Conditions – Optional.

Reports



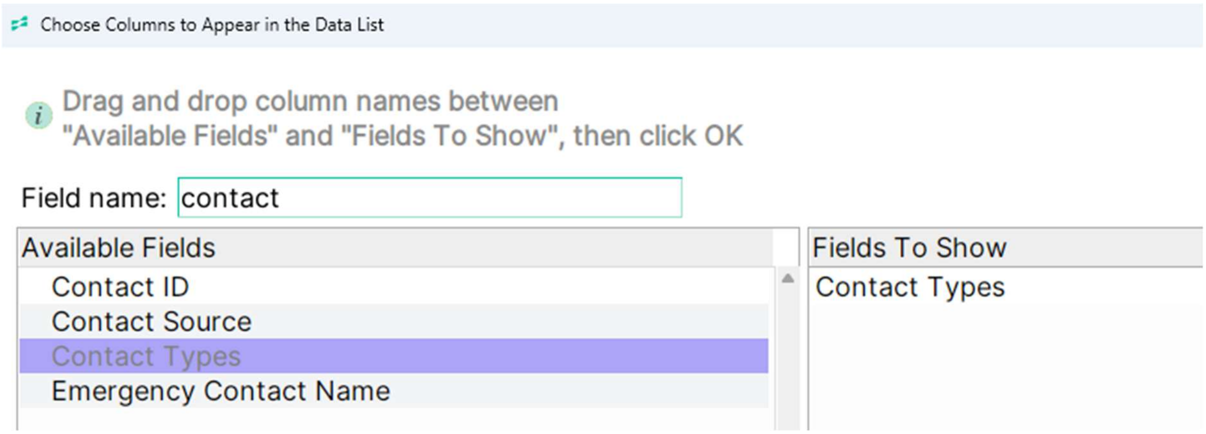
Some of these report options are not relevant to Bowls BC and the ones that are will display additional options or requests for selection. Apart from "Quick Count", these report options are not described further here. It is recommended you experiment with the Report Options and decide which are relevant to your needs. As always, select the members you want to report on from the main contacts screen before selecting "Reports".

For "Quick Counts", decide what you want to report on, for example member types, and do a search to select the members you want to report on, for example all active members.



Then select "Quick Count" and "OK" when asked about the records to process.

You will be asked which fields you want to process. In this case choose "Contact Types" and drag and drop to the right-hand column.



Click on "OK"

Sumac will then return a report (in part) similar to:

Number of records which contain this combination of values:

Value	Count	%
Full Member	64	91.43
Social Member	5	7.14
Full Member (2nd Club)	1	1.43
Total	70	

There will be a variety of options to copy, print, export or email.

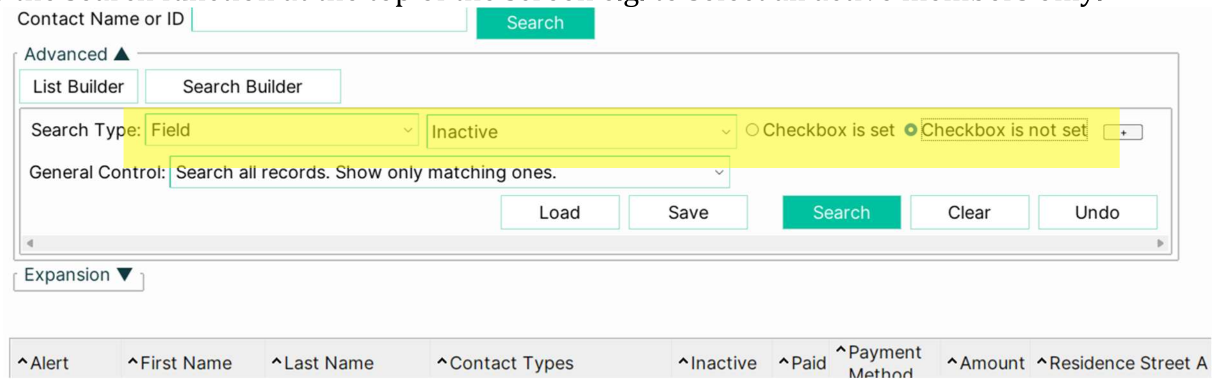
Another useful "Quick Count" is to check how many members are paid up with "Paid" and, if your Club has it, "Amount".

Export

From the Contacts Screen:

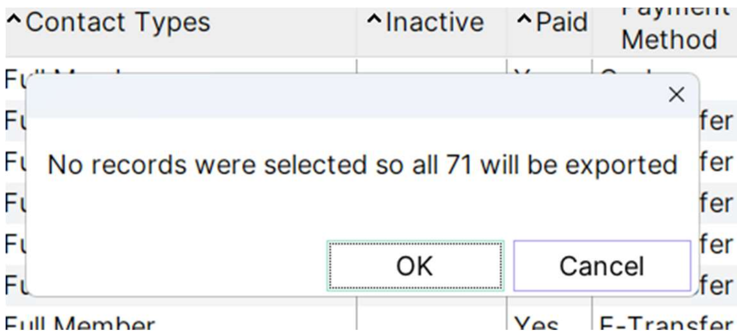
Perform a search for the members data that you want to output to a spreadsheet

Use the search function at the top of the screen e.g. to select all active members only.



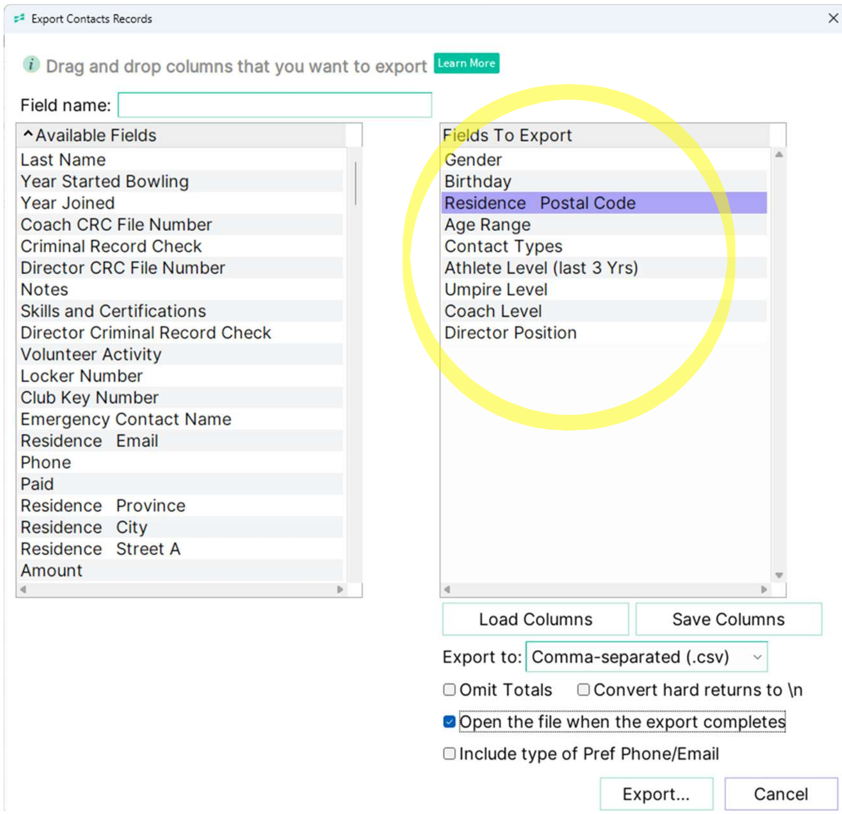
Select "Export" from the left-hand menu.

Select "OK"



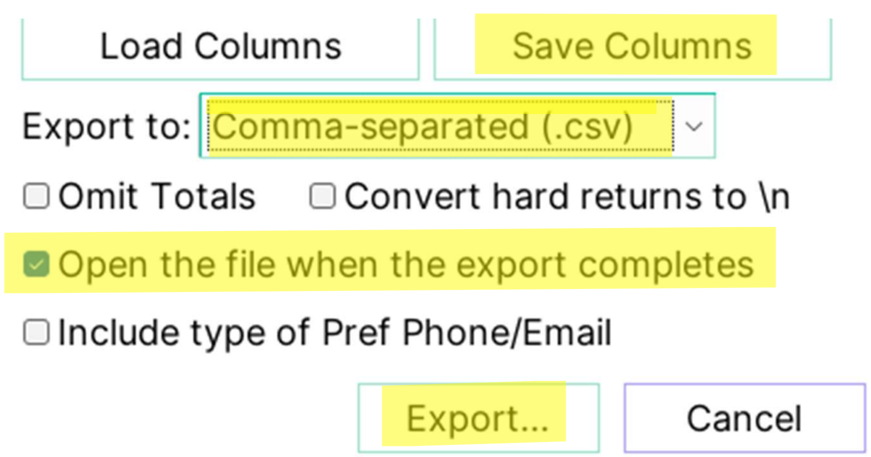
Select "Load Columns" if there is an existing template file (e.g. for ViaSport reporting or an earlier export you did and saved) and navigate to where you saved the template file. Select it and then "Open".

If there is no template file, then drag and drop the required fields into the right-hand box and arrange the order you want.

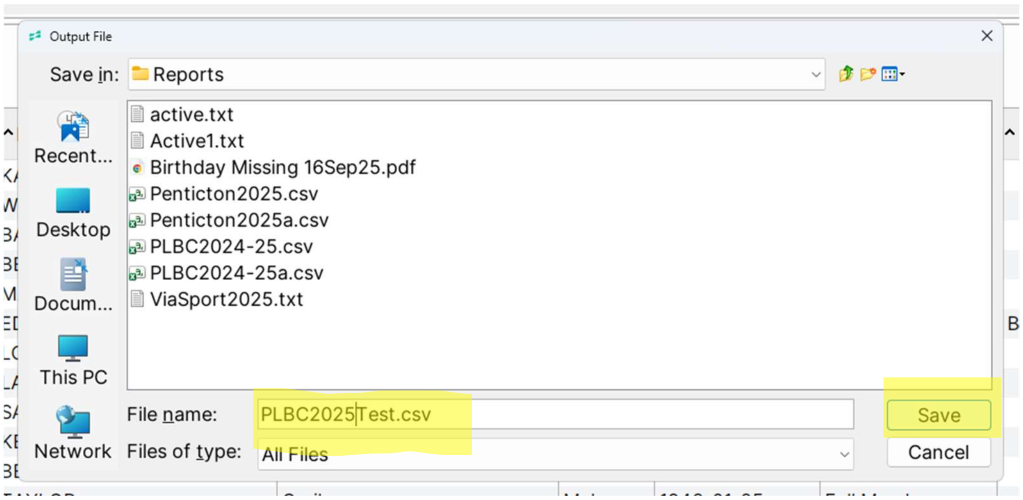


If you want to use these columns again in the future and don't already have a template file, select "Save COLUMNS" and save the new template file.

Select "Export to: Comma separated (.csv)" and "Open file when the export completes". Then select :"EXPORT"

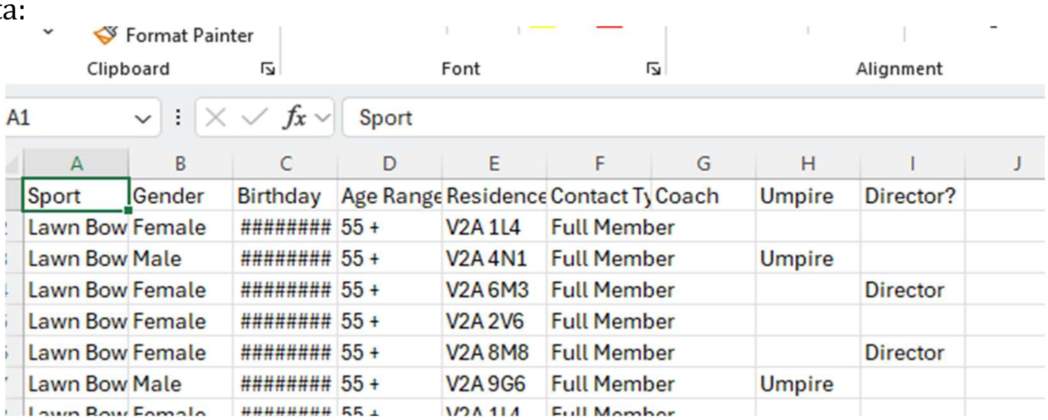


Navigate to where you want to save the file and give it a meaningful name – e.g. your club plus report year.



Select “Save” and an export file will be created and displayed.

The file will look like this so you may need to expand some of the columns to see the data:

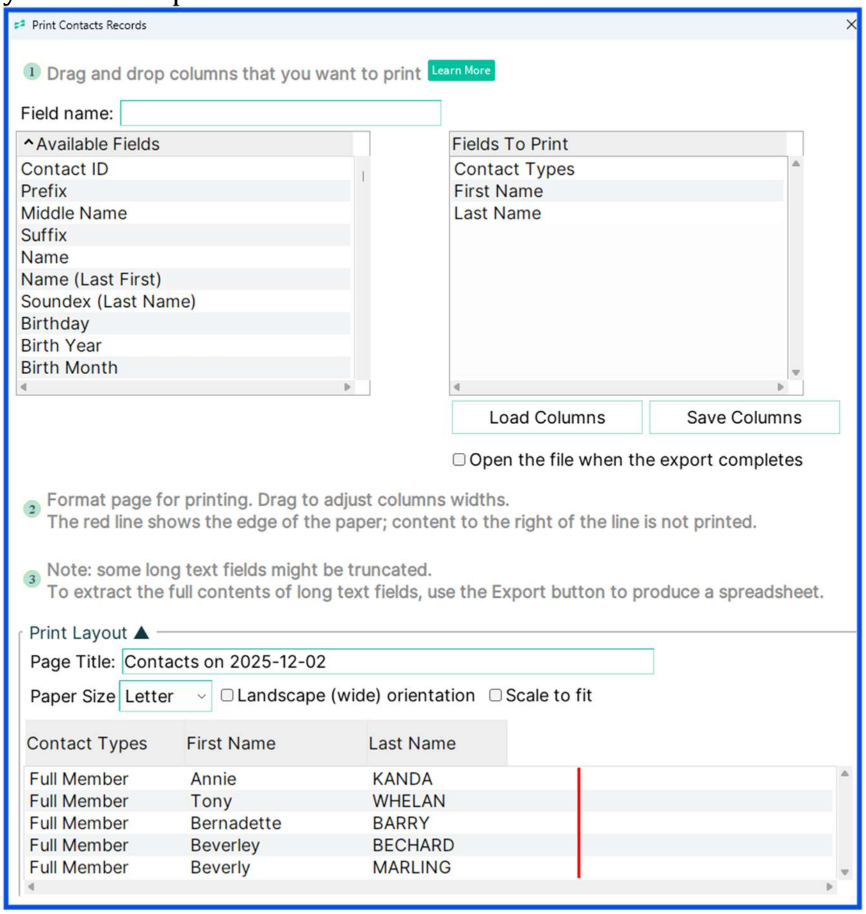


A	B	C	D	E	F	G	H	I	J
Sport	Gender	Birthday	Age Range	Residence	Contact Ty	Coach	Umpire	Director?	
Lawn Bow	Female	########	55 +	V2A 1L4	Full Member				
Lawn Bow	Male	########	55 +	V2A 4N1	Full Member		Umpire		
Lawn Bow	Female	########	55 +	V2A 6M3	Full Member			Director	
Lawn Bow	Female	########	55 +	V2A 2V6	Full Member				
Lawn Bow	Female	########	55 +	V2A 8M8	Full Member			Director	
Lawn Bow	Male	########	55 +	V2A 9G6	Full Member		Umpire		

Once the file is opened, process it and then save it as a normal spreadsheet.

Print

Start by selecting the records you wish to print. Then select "Print" from the left-hand menu. The "Print Contacts Records" windows appears. This is where you build what you want to print.

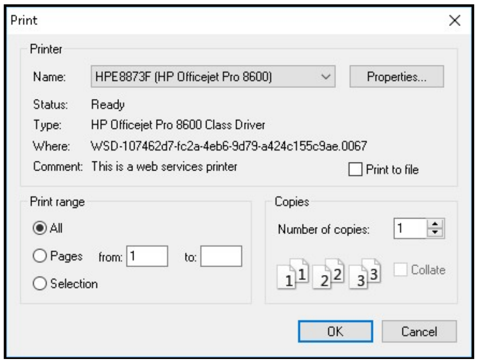


The right-side panel, "Fields to Print", has the list of fields to be printed. The left-side panel contains all the fields not selected.

To remove fields not required, left-click your cursor on the field and drag to the left. To add fields drag from the left to the right. To reorder fields, drag up or down to the required position.

As you do this, you will see a preview of what is to be printed in the bottom half of the screen. Note the red vertical line – this shows where the page break will be. You can use the options to change this, such as selecting "Landscape". You can also adjust the individual column width, as you would in Excel.

When you are happy with the preview, you use "Save Columns" to save a template for future use or select "Print" to print it. The standard Windows dialogue will open up for you to select the printer and options. Press "**OK**" to print.



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

Printing Problems

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

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.

Export

If the above option does not work or columns cannot be removed then Export the same data to a spreadsheet, as described above. reformat it there and create a report.

Mailing

Sumac has the capability to create personized letters for selected or all members of your Club that can then be printed or emailed. This section shows how to use that facility. However, the Email facility can be used for simple emails without using the functionality in the Mailing section here.

Select Recipients:

Start by selecting the members you wish to mail. This can be done either by using the search box at the top of the Contacts Screen, or by selecting from the contact list with a cursor click or by allowing Sumac to default to “All”. Note that “All” does not include any members who are inactive, deceased or moved.

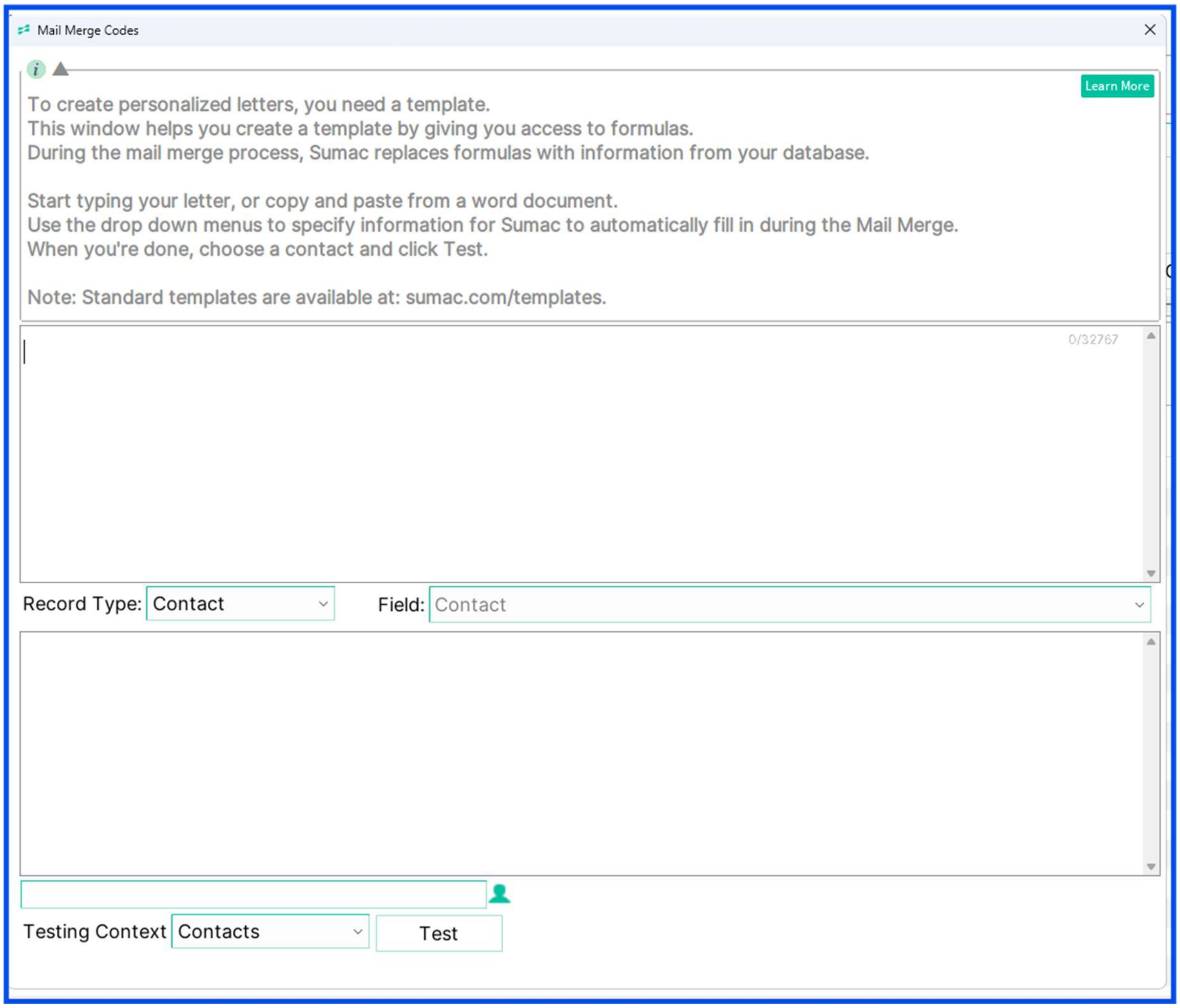
You can select multiple members individually from the contacts list with the standard Microsoft CTRL click or a range by using Shift click.

Open the Mailing Menu

This will display the sub menus:

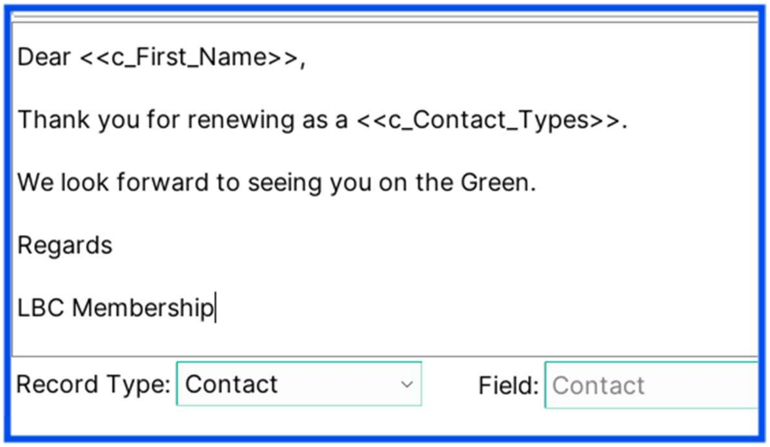
Build the Template

Unless you already have a template developed, start by selecting “Mail Merge Codes”.

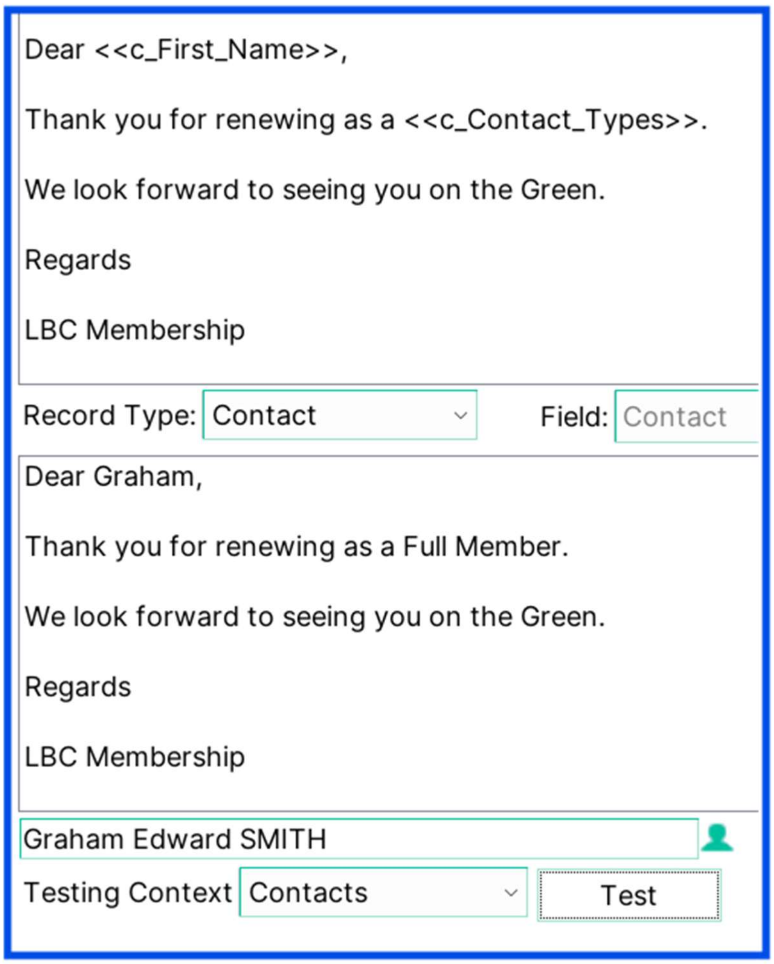


Note the instructions in the top half. The middle section is used to create the template and the bottom section can be used to get a preview of what you have created.

Leave the “Record Type” set to “Contacts”. If you click to the right of “Field”. You will get a drop down of available fields with mail codes (“Formulas”). Select the one you want and it will appear in the upper window where you are typing. For example:



When you have completed your template, you can preview it. At the bottom of the screen, select a sample contact and press “Test”. You will see the results in the lower box.

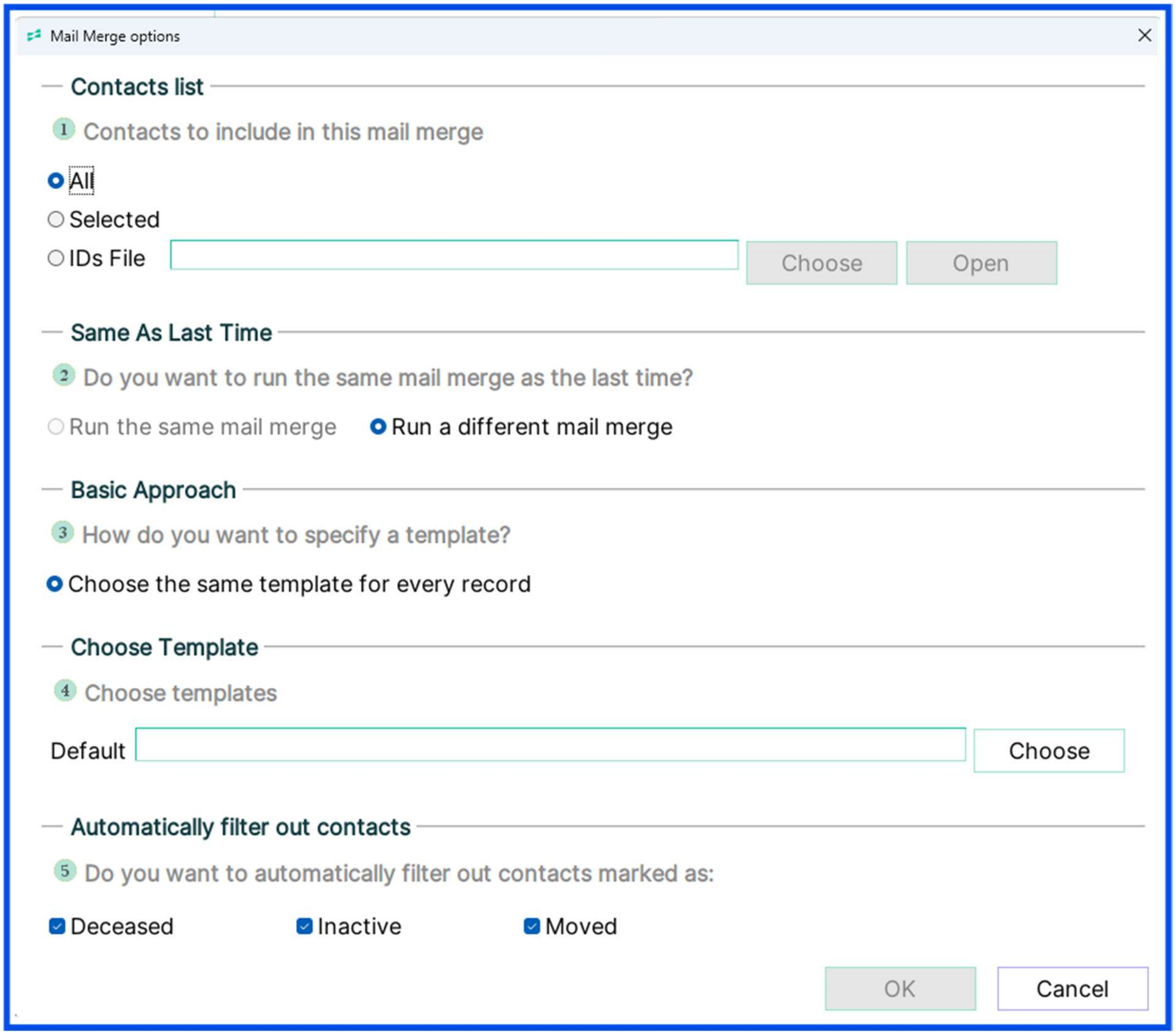


Adjust the upper box until you get the results you want and then click on the “X” at the top right-hand side. You will get a message saying your template has been saved to the Clipboard. Click on “OK”.

Save the clipboard template to a file using Word or equivalent and save it to a .DOCX or RTF file.   You can make further edits in Word, for example: Bold or underline.

Use the Template

The template can be used in either Mail Merge or an email (see below). To use Mail Merge, select “Mailing” then “Mail Merge”. This screen will appear:



If you want to mail all members, select “All” else select “Selected”.

If you want to run the same mail merge as last time, select “Run the same mail merge”.

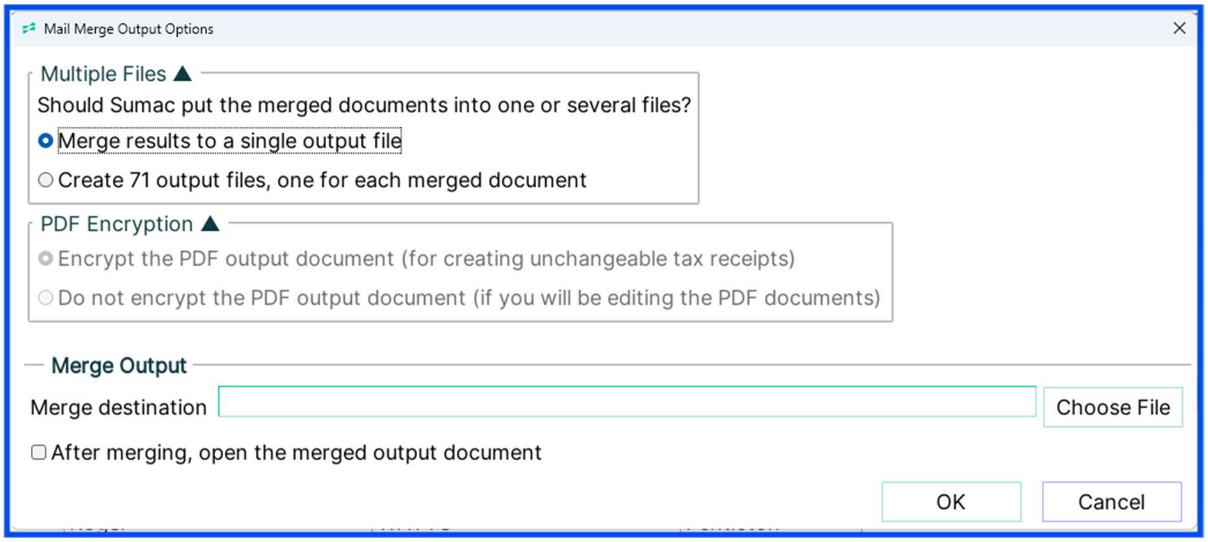
Normally you would leave “Choose the same template for every record” checked.

Under “Choose Template”, select “Choose and navigate to the file you want and select it.

Note that members who are marked as moved, deceased or inactive are automatically omitted unless you untick the appropriate box.

Then select “OK”.

You can now select more merge options:



Unless you have a very large file, it is usually easier to merge into one file.

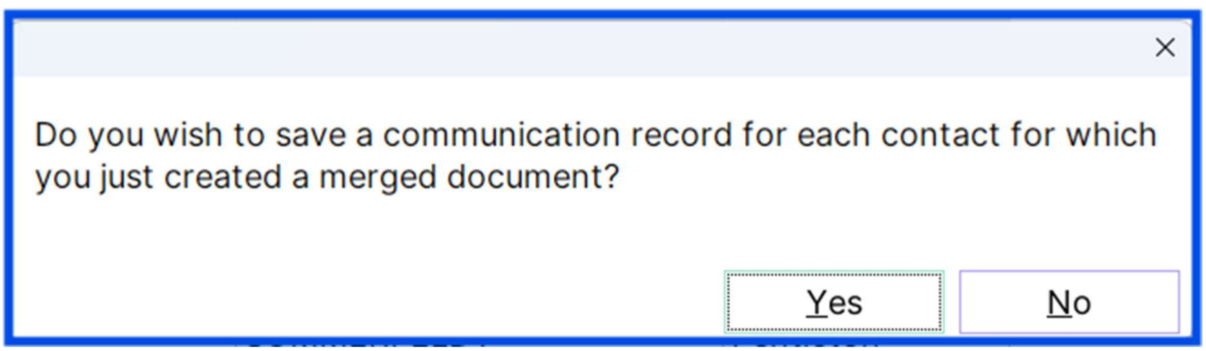
PDF encryption is not normally used and is not available.

Under "Merge Output" chose a destination and name for the output file.

Tick "After merging, open the merged output document" if you want that.

Click "OK" and then click "OK" in the prompt.

After the merge completes, you will be asked if you want to save a communication record.



Unless you are actively using the communication tracking option, select "No".

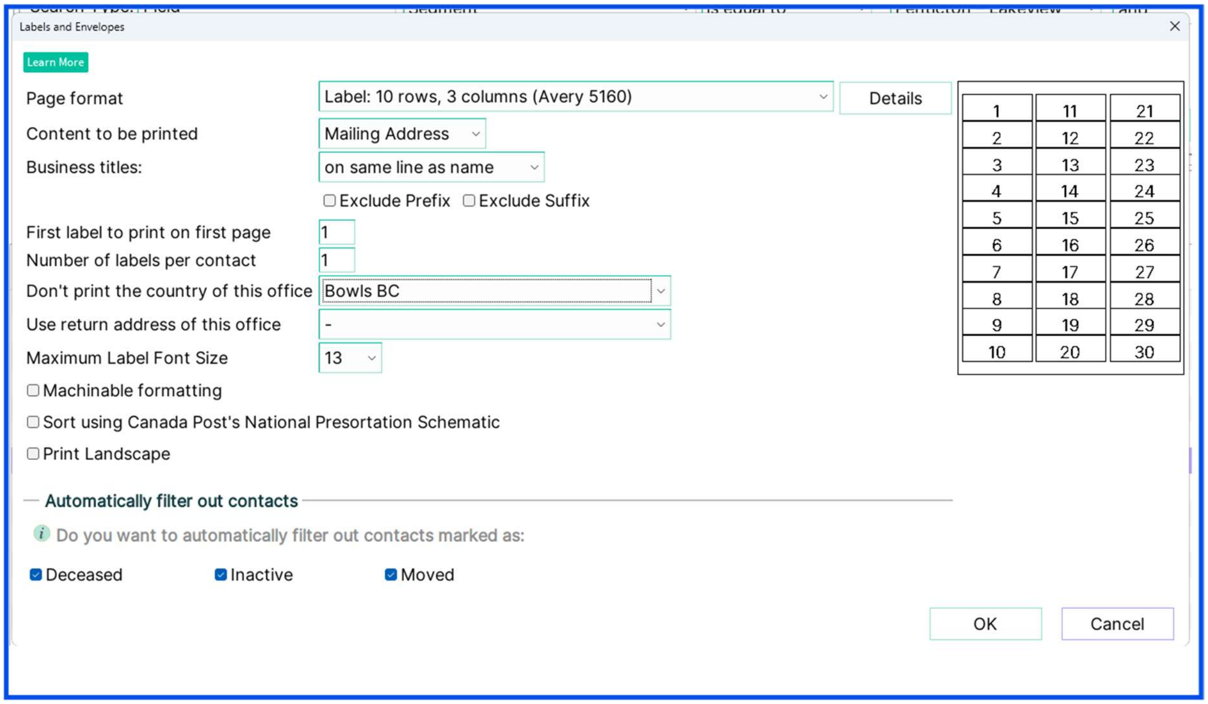
The created file will now appear in your DOCX processing application, and you can check through it for errors. Note you may need to insert a "Page Break" at the bottom of your template if you are saving multiple records to a single file.

Once you are happy with it, save it and you can then print. If you want it in PDF format, then choose "Print to PDF" as your printer.

Print Labels or Envelopes

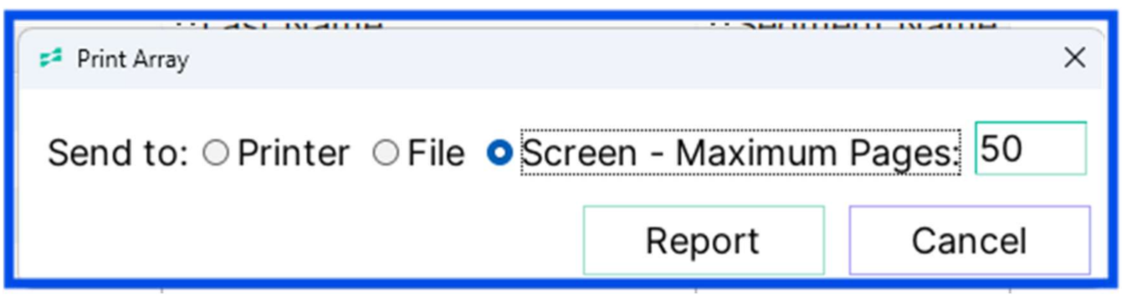
If you want to print labels or envelopes, select the recipients and click on "Mailing" followed by "Labels/Envelopes".

This screen will appear:



Select the options to suit your needs and select "OK".

You can now select the destination – Printer, File or Screen. File is useful if you are either going to edit individual records or use the list more than once. Screen is useful to do a quick check.



If you select "Printer" you will go to the normal Windows Printer dialogue. Selecting "File" allows you to choose a destination and file name.

Select "Report"

Email

Sumac has the capability to email select or all members of your Club. This section shows how to use that facility.

Select Recipients:

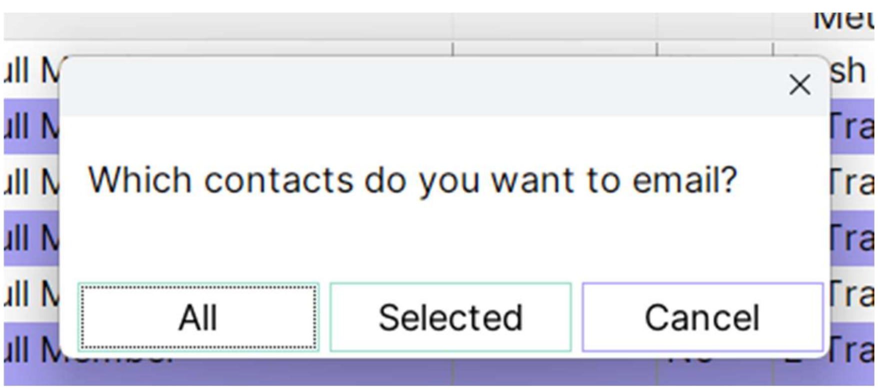
Start by selecting the members you wish to email. This can be done either by using the search box at the top of the Contacts Screen, or by selecting from the contact list with a cursor click or by allowing Sumac to default to “All”. Note that “All” does not include any members who are inactive, deceased or moved.

You can select multiple members individually from the contacts list with the standard Microsoft CTRL click or a range by using Shift click.

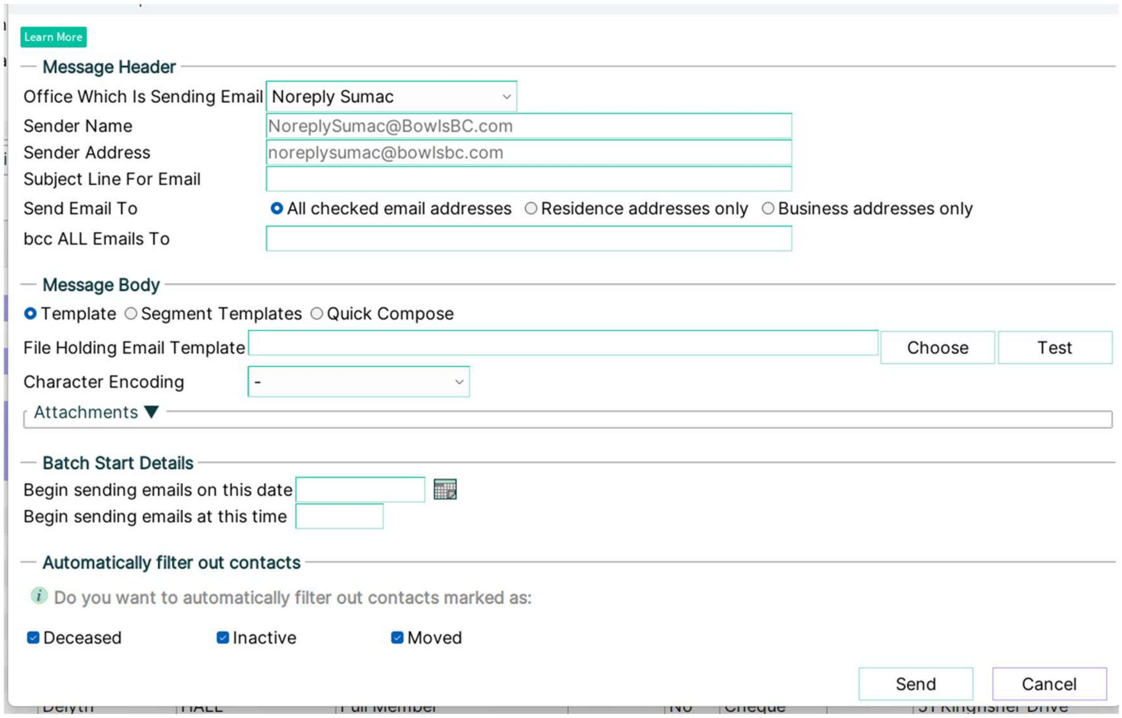
^Alert	^First Name	^Last Name	^Contact Types	^Inactive
	Annie	KANDA	Full Member	
	Anthony	WHELAN	Full Member	
	Bernadette	BARRY	Full Member	
	Beverley	BECHARD	Full Member	
	Beverly	MARLING	Full Member	
	Bill	ALLEN	Full Member	
	Brad	EDWARDS	Full Member	
	Brenda	LONGLAND	Full Member	
	Carol	PERRY	Full Member	Yes

Set up Email

Click on Mail and then Send email on left hand menu



You will get a message asking you to confirm whether you want to email All or only the selected ones.

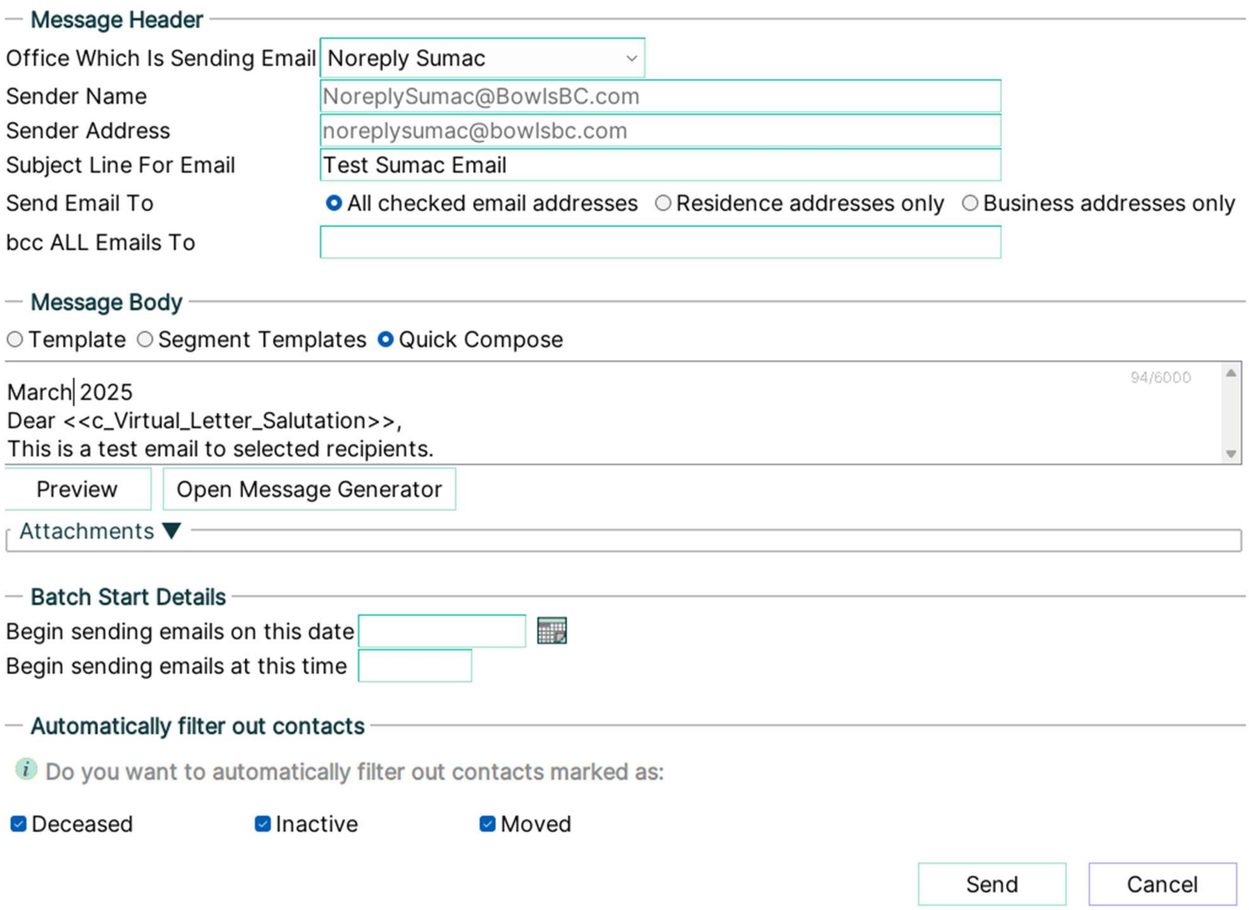


This screen will then display. At the top you select which "Office" (email address) that you want to send from. The default is NoreplySumac@BowlsBC.com. If your Club has set up its own email address with the Sumac Admin, you can select that as an alternate in the drop down. The sender name and address will display as appropriate.

If you use the default NoreplySumac@BowlsBC.com ensure you give an email address in the text of your message that can be used for responses.

Type in an appropriate subject line for the email. Generally, you can ignore the template and encoding lines unless you have created a template in "Mailing".

Click on "Quick Compose" which will open a box to place your message.



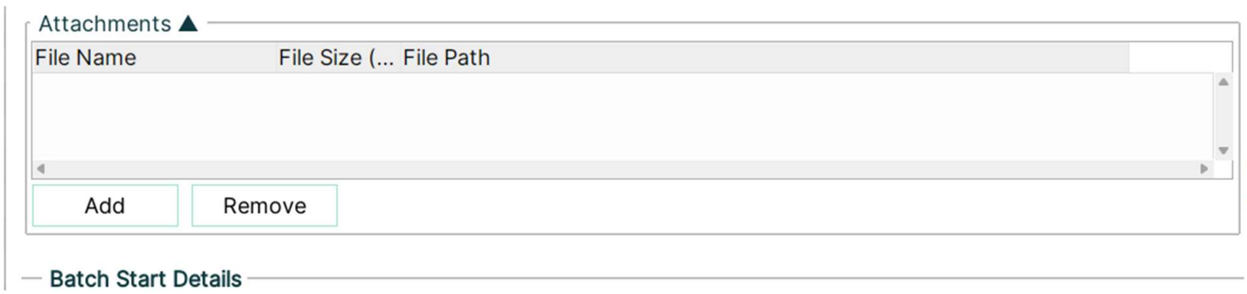
If you want to personalize the message by name, include "Dear <<c_Virtual_Letter_Salutation>>, " at the top. Sumac will obtain the first name from the Sumac database and insert it here for each recipient. See Appendix A for more codes you can use, for example when confirming data with individuals. Alternatively, create a template in "Mailing" and you can paste it into the "Quick Compose" screen. If you may want to use it again, save is as a template (.DOCX) file.

You can copy and paste from another document if you have prepared it beforehand.

You can delay sending the emails until a specific date by using the "Batch Start Details".

If you want to include inactive or moved members you can deselect that flag under "Automatically filter out contacts".

You can add one or more attachments by clicking on "Attachments" and adding the files.

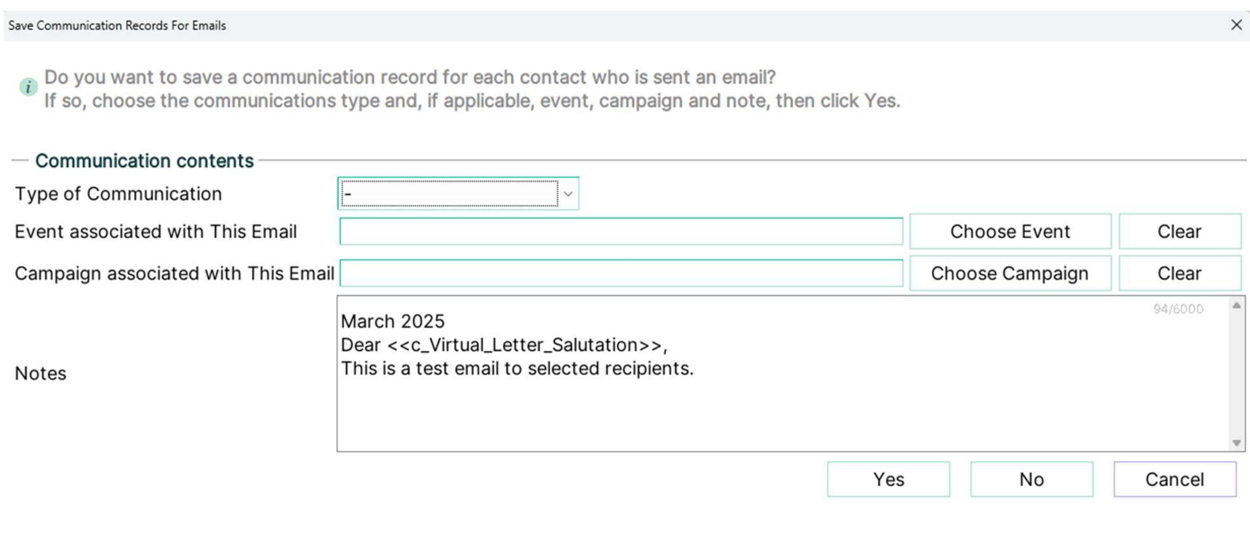


Send the Emails

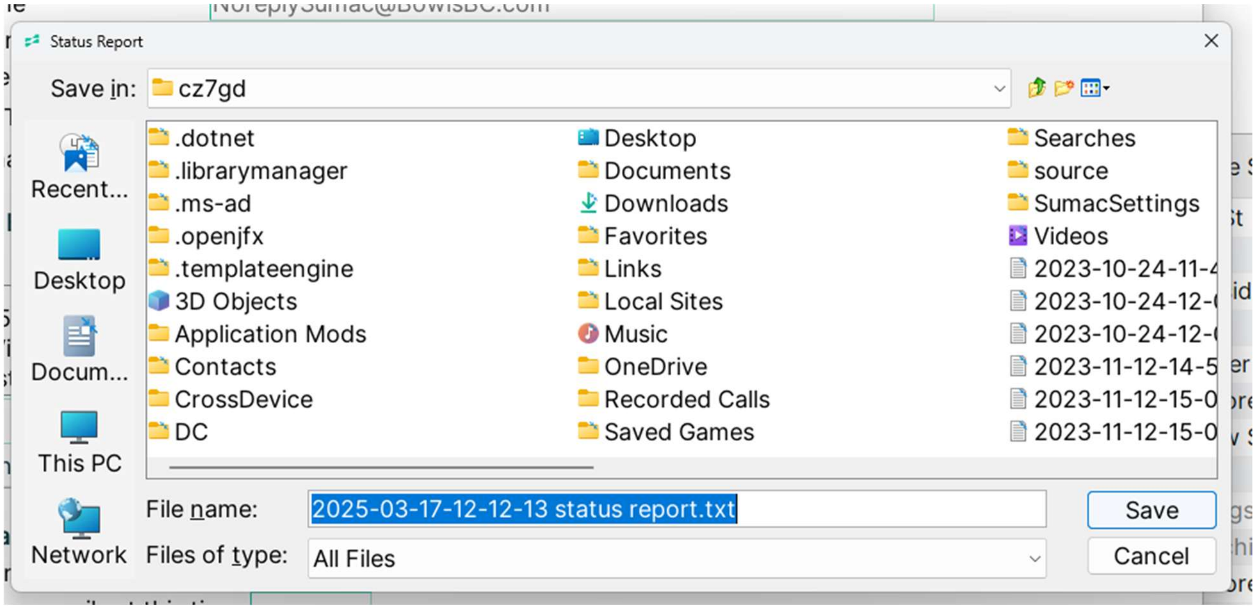
It is important to note that if members share an email address, Sumac will only send out the email to the first one it finds. Second and subsequent occurrences are ignored.

Once you are ready to send the emails, click on “Send”

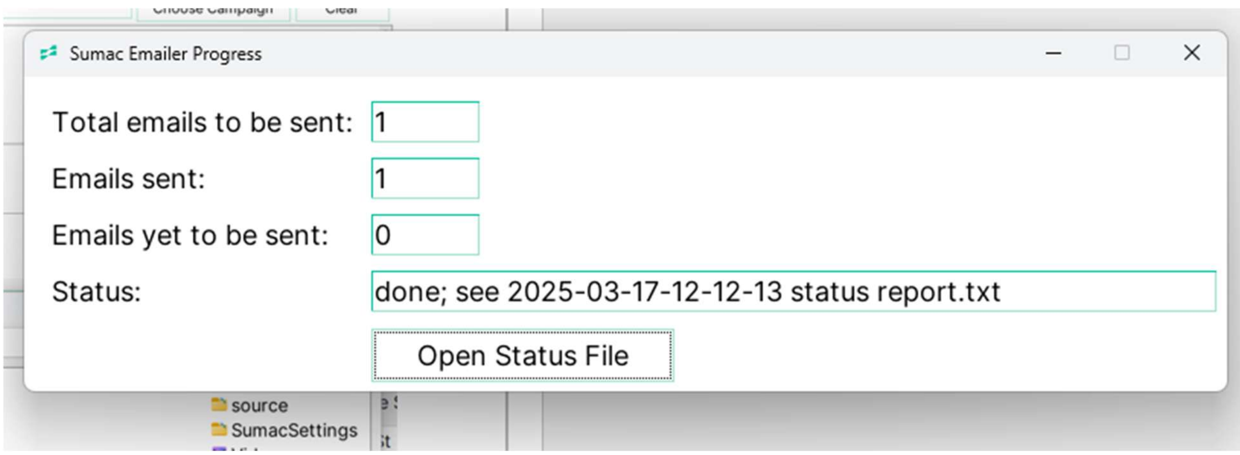
You will be asked if you wish to save a copy of every email sent. Generally it is not necessary to do this so select “No”.



Sumac will save a status file. By default it goes to a Sumac directory somewhere on your computer. You can change the destination to somewhere in your Documents library to make it easier to find.



Status Tracking



Sumac will display a status tracking box letting you know how many emails it has sent so far. Once it completes, you can open the status file with the button to check on any rejects.

GLOSSARY OF TERMS

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

APPENDIX A – FIELD CODES LIST

Personal Details:
<<c_Name_Last_First>>
<<c_Birth_Date>>
<<c_Gender>>
<<c_Virtual_Letter_Salutation>>

Renewal Date
<<c_Renewal_Date>>

Payment Method
<<c_Payment_Method>> <<c_Amount>>

Paid <<c_Paid>>

Membership type
<<c_Contact_Types>>
<<c_Membership_Type_Name>>

Communication types
<<c_Communication_Types>>

Preferred Phone
<<c_Phone>>

Preferred email
<<c_Email_To_Use>>

Mailing Address
<<c_Mail_Address>>

Director or Officer Position
<<c_BBC_Dir>> <<c_BBC_Director>>

CRC Record
<<c_CRC_File_Number>> <<c_Dir_Criminal_Record>> <<c_CRC_DIR_FILE>>
<<c_BBC_CRC>>

Emergency Contact <<c_BBC_EC_Name>>
Emergency Contact Phone <<c_Vacation_Phone>>
Emergency Envelope <<c_BBC_EMERENV>>
Coach Level <<c_BBC_Coach_Level>>
Umpire Level <<c_BBC_Umpire_Level>>

What can you volunteer for and what skills or certifications do you have to offer?
<<c_BBC_Skills>>
<<c_Volunteer_Types>>

Age Range <<c_BBC_Age_Range>>
Club Key <<c_BBC_Club_key_Number>>
Locker <<c_BBC_Locker_Number>>
Notes <<c_Notes>>
Alerts <<c_Alert>>