



Membership System Reporting Instructions

TRAINING MANUAL

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These instructions are provided as a guide to be used when entering membership data directly into the Bowls BC Membership System.

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.

How to use these instructions

These instructions describe how club membership data is entered into the Bowls BC Membership Database. The software on which this system is created has many supporting Videos which you should review.

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

The member data presented on the screen examples are fictitious.

Loading the Sumac System onto your computer

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

Click Start Free **Trial** (blue button)

You will be asked to enter some details such as email address and name. In the comments section at the bottom just state that you are a member of BOWLS BC. Click the **Submit** button (blue).

Follow the instructions as presented. You will be asked to download **Java (free) first** followed by the Sumac software.

After installation it will ask if you are a trial customer (or something like that, or a customer). Click the **Trial** option. Sumac should then launch. Bowls BC is only implementing the Membership module in the Sumac system.

NOTE: You will receive an email from Sumac Support within 24 hours asking if you need help. It is really a sales call. Just explain that you are a Bowls BC user familiarizing yourself with the system until you receive training.

Your Sumac support at Bowls BC is **Brian Sutton**. He can be contacted via phone - [250-246-1006](tel:250-246-1006) or at membership@bowlsbc.com

Brian will or has emailed you a file containing your club's member names that you will load into the Sumac system. You will update the data using the instructions from this training.

Important Dates

Club Directors

May 1st: Review all your club directorship entries in the Membership Database and make the required changes. Keep these details current to ensure your club receives timely communications from Bowls BC and their Regional Districts.

Review these details after every AGM or whenever Director responsibilities change and at the beginning of every Bowling Season.

Affiliation Fees and Membership Data

The following table identifies when Affiliation dues are to be submitted and when the Membership Database must be updated. Reconciliation of the Affiliation payments can only be made when the Membership data has been input.

June 15th Payment: The total amount due June 15th is the total affiliation fees collected up to May 31st for the current playing season (Apr 1 – Mar 31). Enter the amount of affiliation fees you paid by June 15th in the blue field. Update the Membership Data following the instructions below. This should be done as soon as possible after a member is registered before June 15th and at any time a member is registered and pays club membership fees.

Note that all members have their membership type (Full Member, Junior Member etc.) set to blank on May 1st each year. Clubs are required to update Membership Data with the registered membership type.

Affiliation fees must be submitted to:

The Treasurer
Bowls BC
2746 Cultus Ave.
Coquitlam, BC
V3C 5A5

September 15th Payment: The total amount due September 15th is the total affiliation fees collected up to August 31st, less the amount already paid on or before June 15th.

Feb 28th Payment (Indoor Clubs): The total amount due February 28th is the total affiliation fees collected after September 15th.

Bowls BC needs club directors' correct email addresses to be kept current ALWAYS.

Affiliation Fee Collection

Here are the deadlines on Affiliation Fee Collection Process:

May 01

- Membership Database reset for the new year, This done by Bowls BC
- Review Club Director entries in Membership Database.

June 15

- Clubs complete the update of membership data online to the Membership Database
- Clubs pay affiliation fees due to date

Sep 15

- Clubs complete the update of membership data online to the Membership Database
- Clubs pay affiliation fees due to date

Feb 28


- Indoor Clubs complete the update of membership data online to the Membership Database
- Indoor clubs pay affiliation fees due to date

Who Has Access to Your Data and for What Purpose:

Position	Security
Club Membership Director	<ul style="list-style-type: none"> 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
Club Directors	<ul style="list-style-type: none"> Can only View their Club Member Data Can View Club Directors in Region Can View Regional Directors
Regional Directors	<ul style="list-style-type: none"> Can View all Club Member Data within their Region Can View Club Directors in Region Can View Regional Directors
Bowls BC Membership Committee	<ul style="list-style-type: none"> Can View all Clubs Member Data. Can Update membership status during annual reset of Members Data As requested by Clubs, can Delete Specific Member Data Can Purge old non-member data from Database Can View Club Directors in All Region Can View All Regional Directors
Bowls BC Directors	<ul style="list-style-type: none"> Can View all Clubs Member Data for statistical purposes or to contact certain groups (e.g. Coaches) Can View Club Directors in All Region Can View All Regional Directors

Log on To Sumac

The Bowls BC Membership Database uses the Sumac software. Brian Sutton will provide your club's database via email and it can be loaded into the Sumac system via the Database box shown below. You will need to be connected to the internet to update the database in real time.

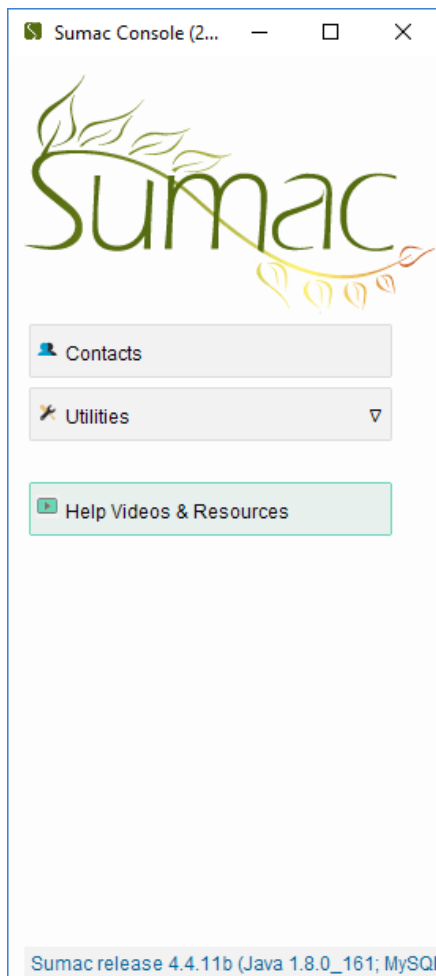
After downloading and saving the file on your computer, click on the  to the right of the Database box. Locate your club's downloaded database file and left click to load it.



To access the Bowls BC Membership Database specific to your club, you will/have been supplied with three Log-Ins.

1. Club Membership Director This ID and password has been provided to the person responsible for entering membership data at your club.
2. Club Director - responsible for updating club director contact information.
3. Club Directors – can view V&D club directors.

If you require a second ID please request one from the Bowls BC Membership Committee. The request form can be accessed on the Bowls BC website and, when completed, is sent to your club president who will then forward it to the Bowls BC District Rep. **Do not share your ID and password with anyone.**



Navigation

The first screen to appear is shown below.

Contacts

Clicking on this menu item will take you to the **Contacts** screen from where you can:

1. see all the current members that have signed up with your club,
2. change member data, and
3. add new members.

The term Contact refers to any Member registered at your club, whether they are a full-time bowler, volunteer, social member or other.

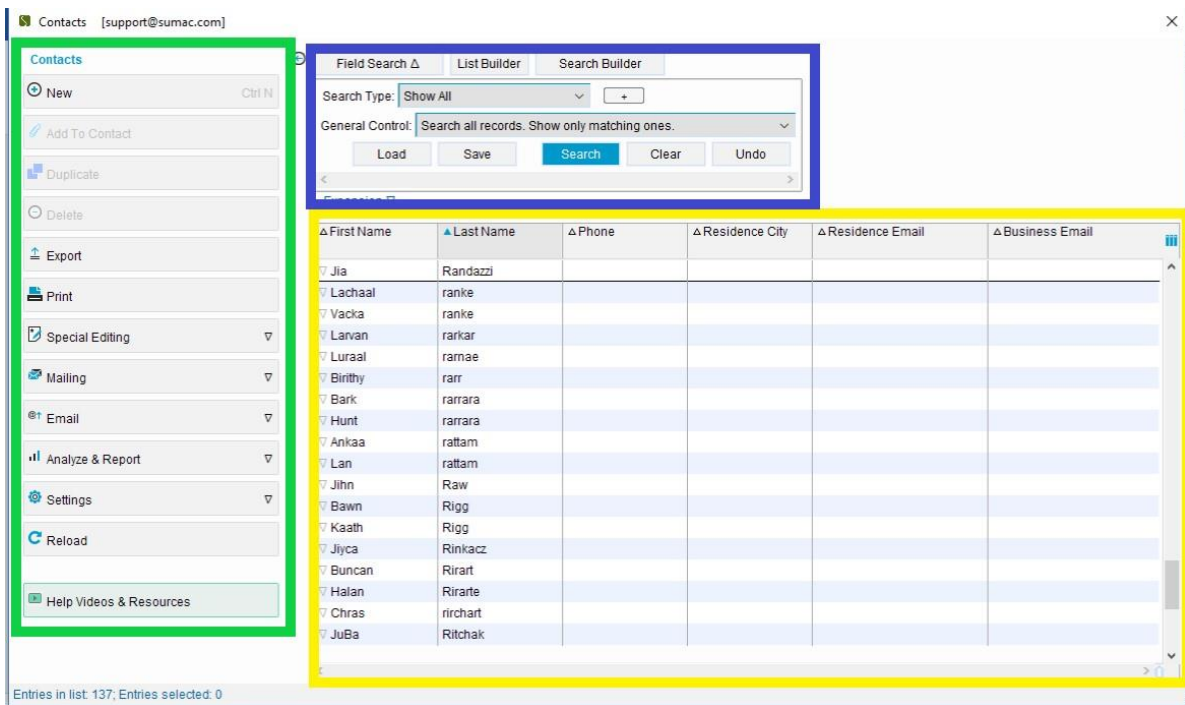
The next Section will focus on the MANDATORY information required by Bowls BC.

MANDATORY Information

Contacts

This screen is the starting point for adding, changing, reporting 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' interface with the following components:

- 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 control 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 17 rows of data.

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

Entries in list: 137; Entries selected: 0

Finding a person in the database

The membership data for your club contains all the members from last year plus any past members who did not rejoin last year.

To locate a person, you may wish to do so using a first name, last name or any other attribute such as email address or phone number. The following example will illustrate this procedure.

Locate a person by Last Name.

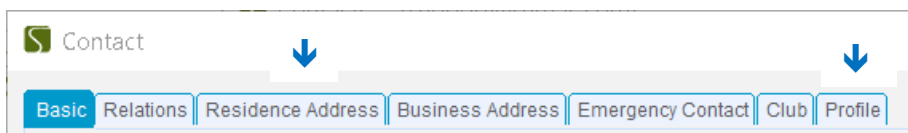
In the search results area (yellow) click the column heading '**Last name**'. This will sort the search results by last name. Keep the cursor on the word 'Last Name' and start to enter the last name of the person you wish to find. If the person is in the data base, their name will be presented at the top of the list. If the person is not found, the search screen view will not change.



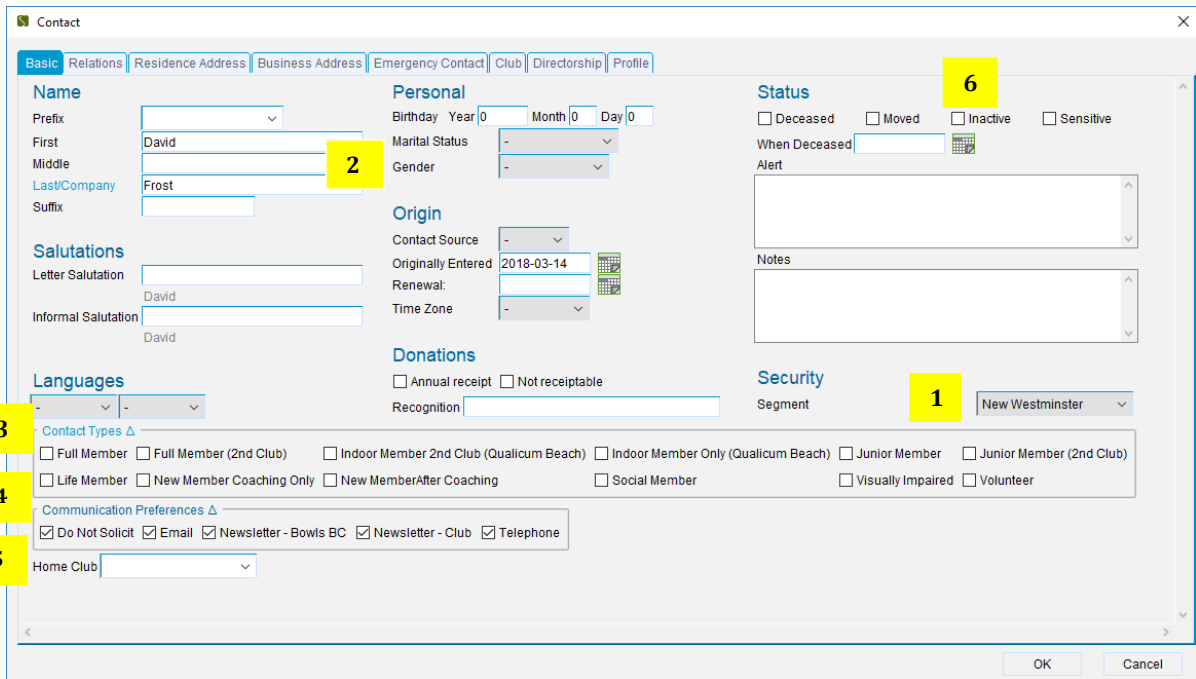
First Name	Last Name	Phone	Residence City	Residence Email	Business Email
Jia	Randazzi				
Lachaal	ranke				
Vacka	ranke				
Larvan	rankar				
Lursal	ramae				
Birithy	rarr				
Bark	ramars				
Hunt	ramara				
Ankaa	rattam				
Lan	rattam				
Jihn	Raw				
Bawn	Rigg				
Kaath	Rigg				
Jlyca	Rinkacz				
Buncan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

To update the existing **MANDATORY** information for **existing** members, left double click on the member name.

You will be using three screens which will automatically appear as data is entered. They are: **Basic, Residence Address, Profile**



The Basic Screen



The **First and Last name** have been carried forward from the previous screen.

1. The field '**Segment**' (the System identifies your Club as a Segment) has been pre-filled by the system with your club name; (e.g. in this example as 'New Westminster'.)

Mandatory fields on the basic screen are;

- 2) **Gender**
- 3) **Contact Type** (i.e. Membership Type)
- 4) **Communication Preferences**
- 5) **Home Club only when the Contact type indicates that this is a 2nd Club** (that is the member has paid affiliation fees at another club) the Home Club must be selected from the drop-down box at the bottom of this screen.
- 6) **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.

All other fields on this screen are optional.

NOTE: To conform with provincial privacy laws, Communication Preferences must be supported by a signature on the Members' Application/Membership Renewal form.

If your club decides to use this Sumac program as its primary membership system, an email program is built in that allows you to contact members with individual emails. More about this feature in a following segment.

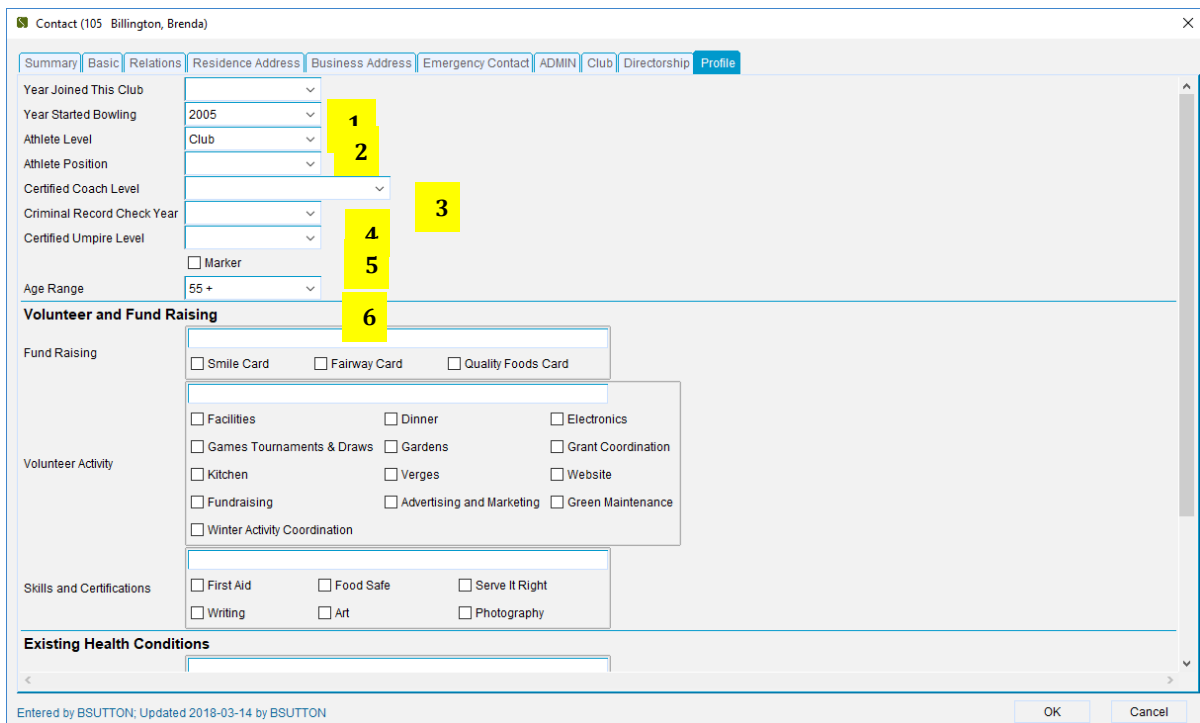
Social Members

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.

Profile Screen



Contact (105) Billington, Brenda

Summary | Basic | Relations | Residence Address | Business Address | Emergency Contact | ADMIN | Club | Directorship | Profile

Year Joined This Club [dropdown]
Year Started Bowling 2005 [dropdown] **1**
Athlete Level Club [dropdown] **2**
Athlete Position [dropdown]
Certified Coach Level [dropdown] **3**
Criminal Record Check Year [dropdown] **4**
Certified Umpire Level [dropdown] **5**
 Marker
Age Range 55+ [dropdown] **6**

Volunteer and Fund Raising

Fund Raising
 Smile Card Fairway Card Quality Foods Card

Volunteer Activity
 Facilities Dinner Electronics
 Games Tournaments & Draws Gardens Grant Coordination
 Kitchen Verges Website
 Fundraising Advertising and Marketing Green Maintenance
 Winter Activity Coordination

Skills and Certifications
 First Aid Food Safe Serve It Right
 Writing Art Photography

Existing Health Conditions

Entered by BSUTTON, Updated 2018-03-14 by BSUTTON

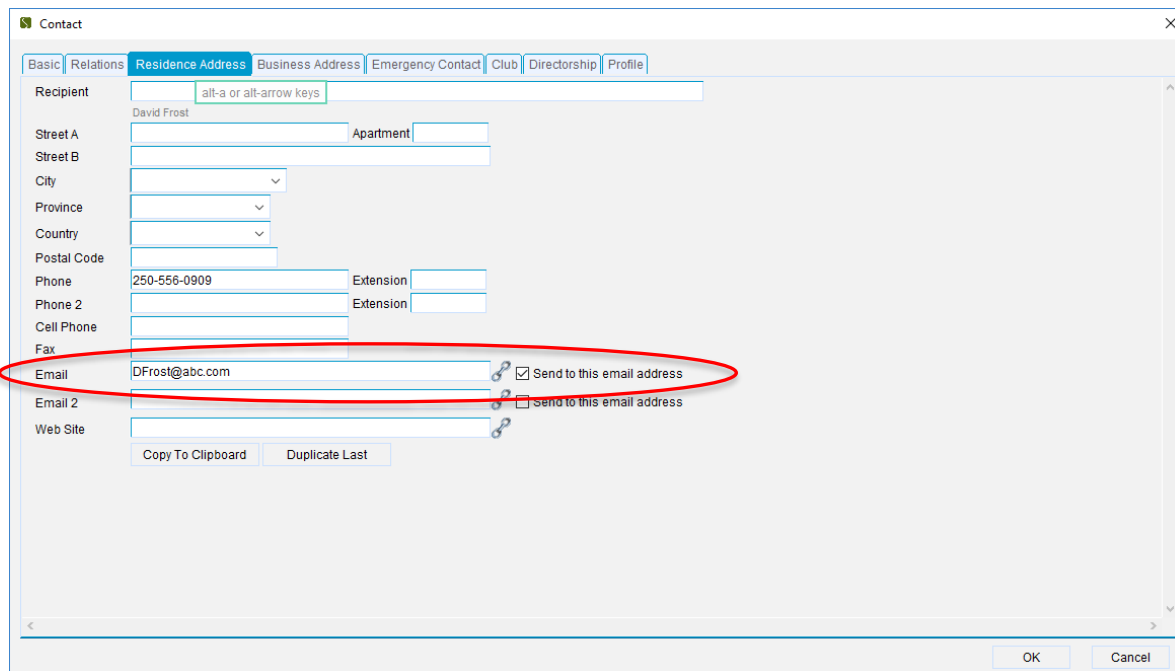
OK Cancel

The following fields are mandatory:

- 1. Year Started Bowling**
- 2. Athlete Level**
- 3. Certified Coach Level** (can be blank)
- 4. Criminal Record Check Year** (If a Coach)
- 5. Certified Umpire Level** (can be blank)
- 6. Age Range**

All other fields on this screen are optional.

Residence Address screen



The screenshot shows a 'Contact' window with the 'Residence Address' tab selected. The form contains the following fields and options:

- Recipient: David Frost
- Street A: [Text Field] Apartment: [Text Field]
- Street B: [Text Field]
- City: [Dropdown Menu]
- Province: [Dropdown Menu]
- Country: [Dropdown Menu]
- Postal Code: [Text Field]
- Phone: 250-556-0909 Extension: [Text Field]
- Phone 2: [Text Field] Extension: [Text Field]
- Cell Phone: [Text Field]
- Fax: [Text Field]
- Email: DFrost@abc.com Send to this email address
- Email 2: [Text Field] Send to this email address
- Web Site: [Text Field]

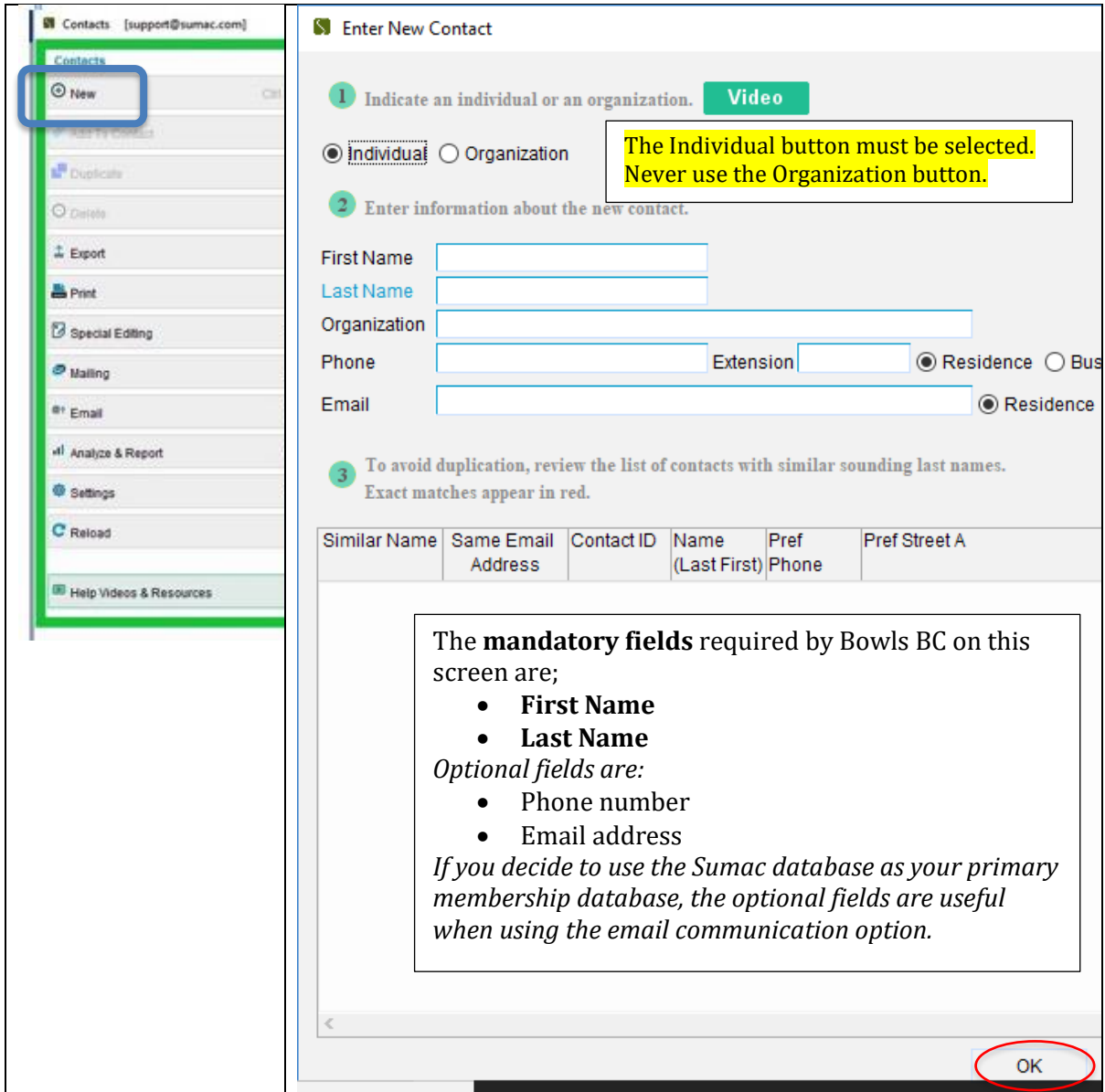
Buttons: Copy To Clipboard, Duplicate Last, OK, Cancel

The following fields are mandatory

- **Email Address** if the member wants to receive communications from Bowls BC. This is especially important if the Member is on the Clubs' Board of Directors.

Adding a New Member

To add a new member, click 'New' (top left of screen in the **green area**). 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 Bus

Email Residence

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

Similar Name	Same Email Address	Contact ID	Name (Last First)	Pref Phone	Pref Street A
<p>The mandatory fields required by Bowls BC on this screen are;</p> <ul style="list-style-type: none"> • First Name • Last Name <p><i>Optional fields are:</i></p> <ul style="list-style-type: none"> • Phone number • Email address <p><i>If you decide to use the Sumac database as your primary membership database, the optional fields are useful when using the email communication option.</i></p>					

OK

Click **OK** when you have finished entering the **mandatory** information to save it.

Complete the **Mandatory** information sections on the following three screens:

Basic - instructions on page 12

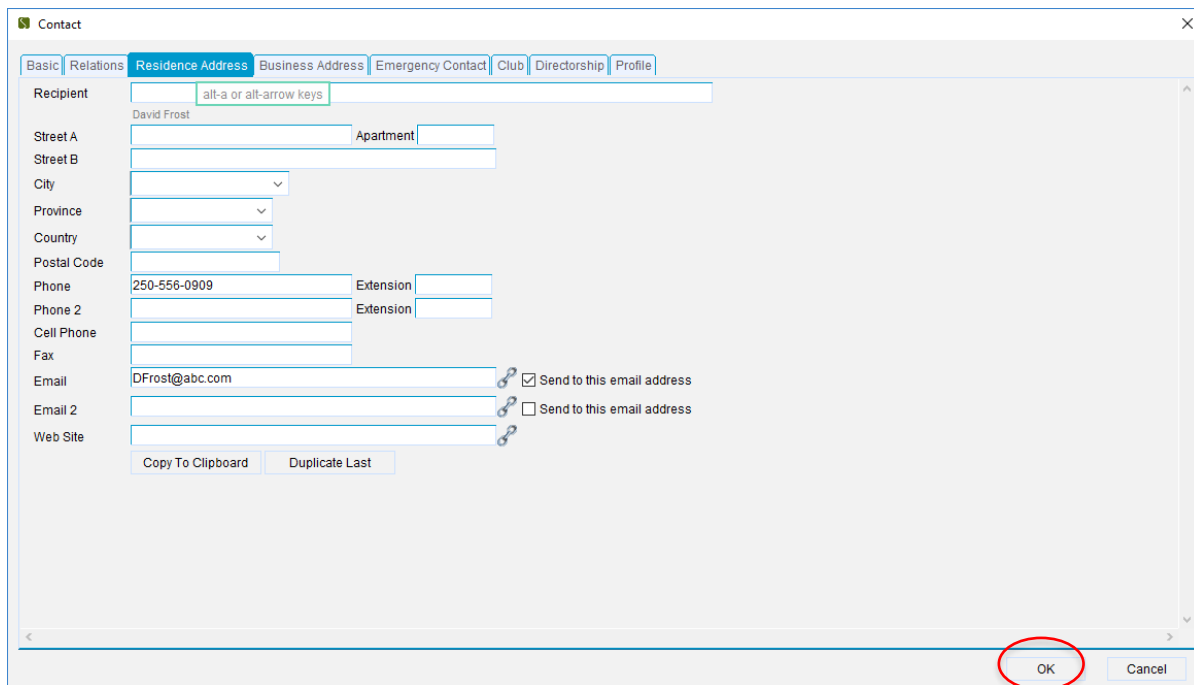
Profile screen - instructions on page 14

Residence Address - instructions on page 15

Optional Information

This section will explain the information that clubs can enter if they decide that the Sumac system will be their primary membership database.

Residence Address Screen



The screenshot shows a 'Contact' window with the 'Residence Address' tab selected. The form contains the following fields and options:

- Recipient: David Frost
- Street A: [text input] Apartment: [text input]
- Street B: [text input]
- City: [dropdown menu]
- Province: [dropdown menu]
- Country: [dropdown menu]
- Postal Code: [text input]
- Phone: 250-556-0909 Extension: [text input]
- Phone 2: [text input] Extension: [text input]
- Cell Phone: [text input]
- Fax: [text input]
- Email: DFrost@abc.com Send to this email address
- Email 2: [text input] Send to this email address
- Web Site: [text input]

Buttons: Copy To Clipboard, Duplicate Last, OK (circled in red), Cancel.

Recipient Information is automatically filled in by the system from previous inputs.

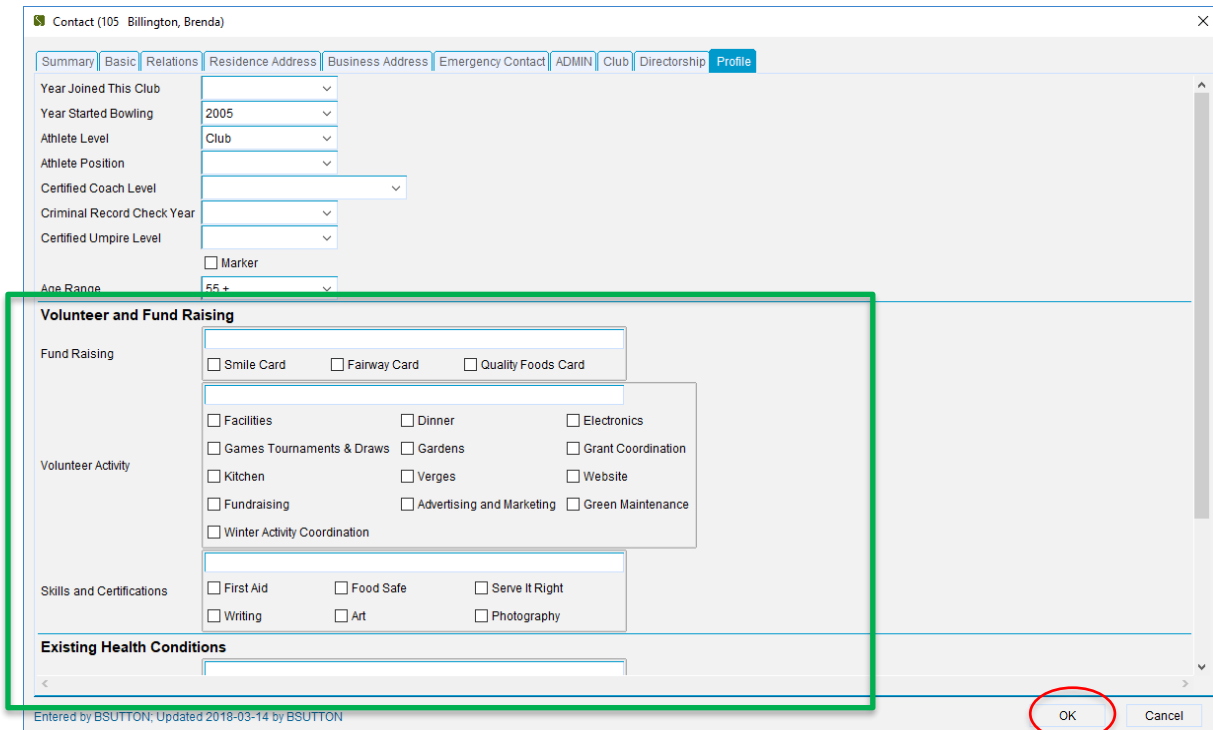
On this screen you can add the member's address, phone number, etc., as required.

Click **OK** when you have finished entering the **optional** information to save it.

Profile Screen: Volunteers

Identifying Club Members who are volunteers is optional. When used in conjunction with Volunteer activities and skills (on the **Profile** screen) clubs will be able to perform searches, create reports and send emails to volunteers based on these criteria.

For example, when planning a Canada Day event, a Club may need to know who has volunteered for kitchen work. A report of all members who have volunteered for the kitchen could be executed as well as an email sent to each one regarding the event.



Contact (105 Billington, Brenda)

Summary Basic Relations Residence Address Business Address Emergency Contact ADMIN Club Directorship **Profile**

Year Joined This Club
Year Started Bowling 2005
Athlete Level Club
Athlete Position
Certified Coach Level
Criminal Record Check Year
Certified Umpire Level
 Marker
Age Range 55+

Volunteer and Fund Raising

Fund Raising
 Smile Card Fairway Card Quality Foods Card

Volunteer Activity
 Facilities Dinner Electronics
 Games Tournaments & Draws Gardens Grant Coordination
 Kitchen Verges Website
 Fundraising Advertising and Marketing Green Maintenance
 Winter Activity Coordination

Skills and Certifications
 First Aid Food Safe Serve It Right
 Writing Art Photography

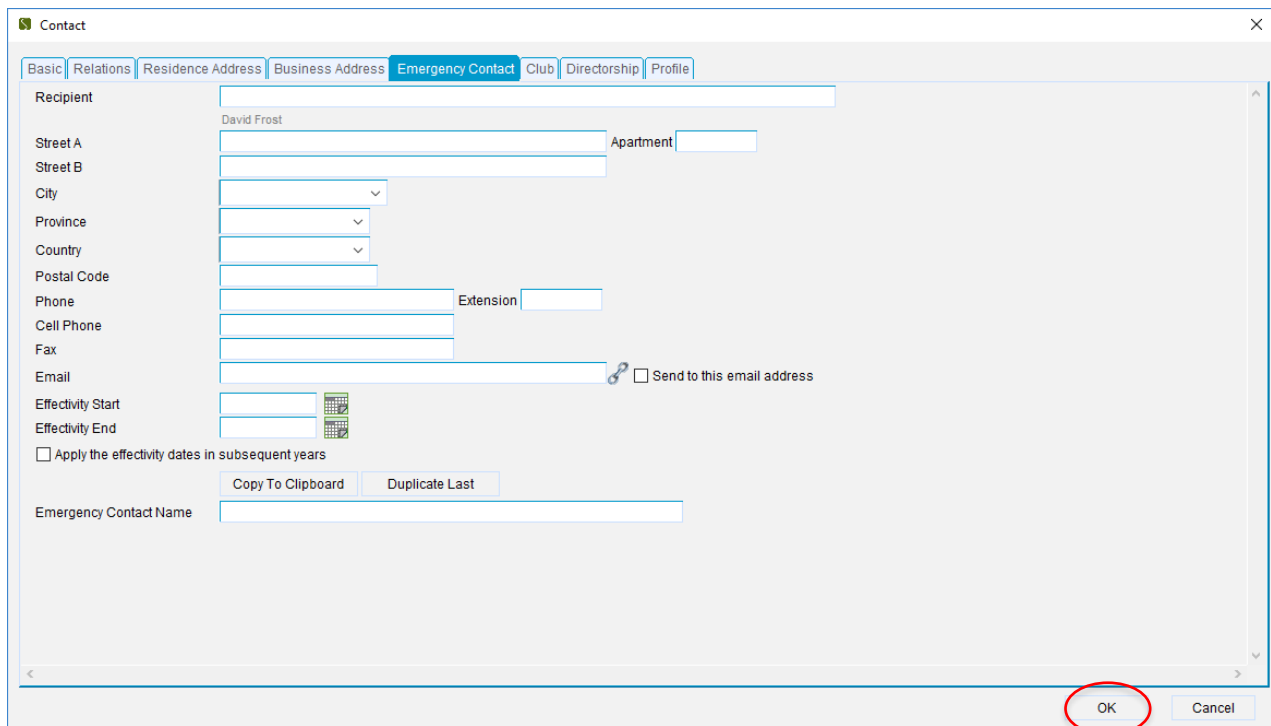
Existing Health Conditions

Entered by BSUTTON. Updated 2018-03-14 by BSUTTON

OK Cancel

Click **OK** when you have finished entering the **optional** information to save it.

Emergency Contact



Recipient: David Frost

Street A: [Text Box] Apartment: [Text Box]

Street B: [Text Box]

City: [Dropdown]

Province: [Dropdown]

Country: [Dropdown]

Postal Code: [Text Box]

Phone: [Text Box] Extension: [Text Box]

Cell Phone: [Text Box]

Fax: [Text Box]

Email: [Text Box] Send to this email address

Effectivity Start: [Text Box] [Calendar Icon]

Effectivity End: [Text Box] [Calendar Icon]

Apply the effectivity dates in subsequent years

Copy To Clipboard Duplicate Last

Emergency Contact Name: [Text Box]

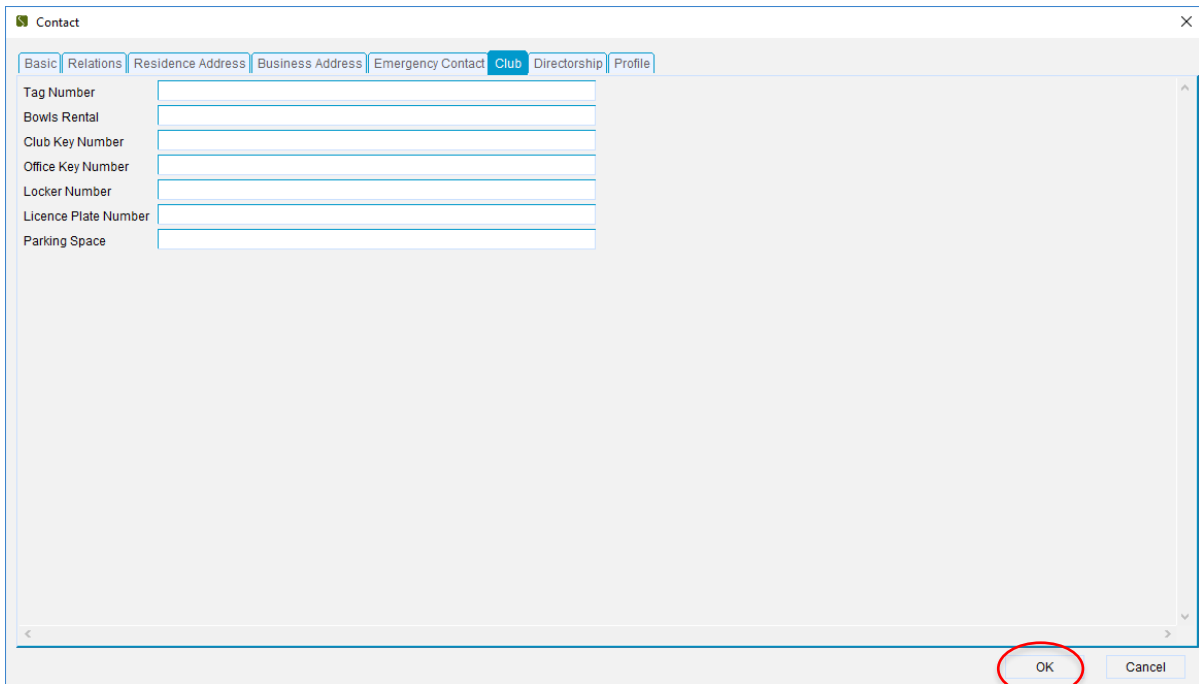
OK Cancel

This data is for Club use only and is optional.

Clubs will be able to create reports based on this data.

Click **OK** when you have finished entering the **optional** information to save it.

Club Screen



Contact

Basic Relations Residence Address Business Address Emergency Contact **Club** Directorship Profile

Tag Number

Bowls Rental

Club Key Number

Office Key Number

Locker Number

Licence Plate Number

Parking Space

OK Cancel

This data is for Club use only and is optional. There are no rules as to what may be entered.

If there is another field that your club would find useful, please contact the Membership Committee to have it setup.

Clubs will be able to create reports based on this data.

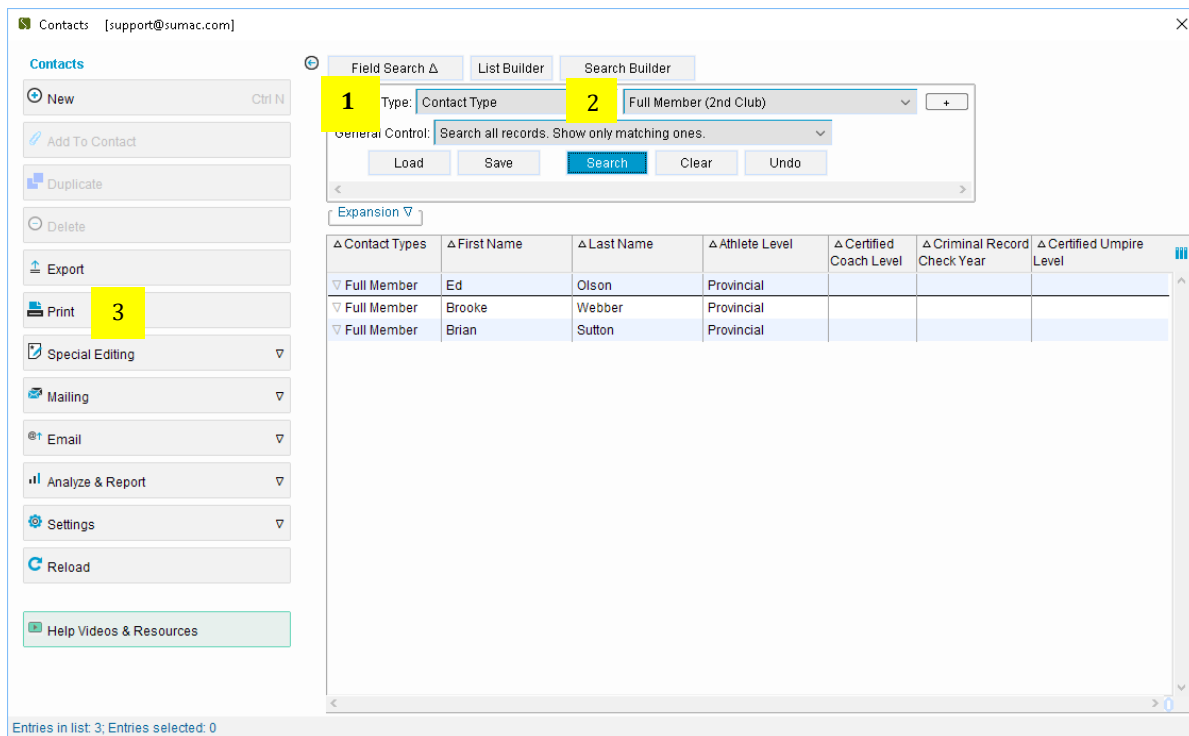
Click **OK** when you have finished entering the **optional** information to save it.

Printing

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:

- Field Search:** Type: Contact Type
- List Builder:** Full Member (2nd Club)
- General Control:** Search all records. Show only matching ones.
- Buttons:** Load, Save, Search, Clear, Undo

The search results table is as follows:

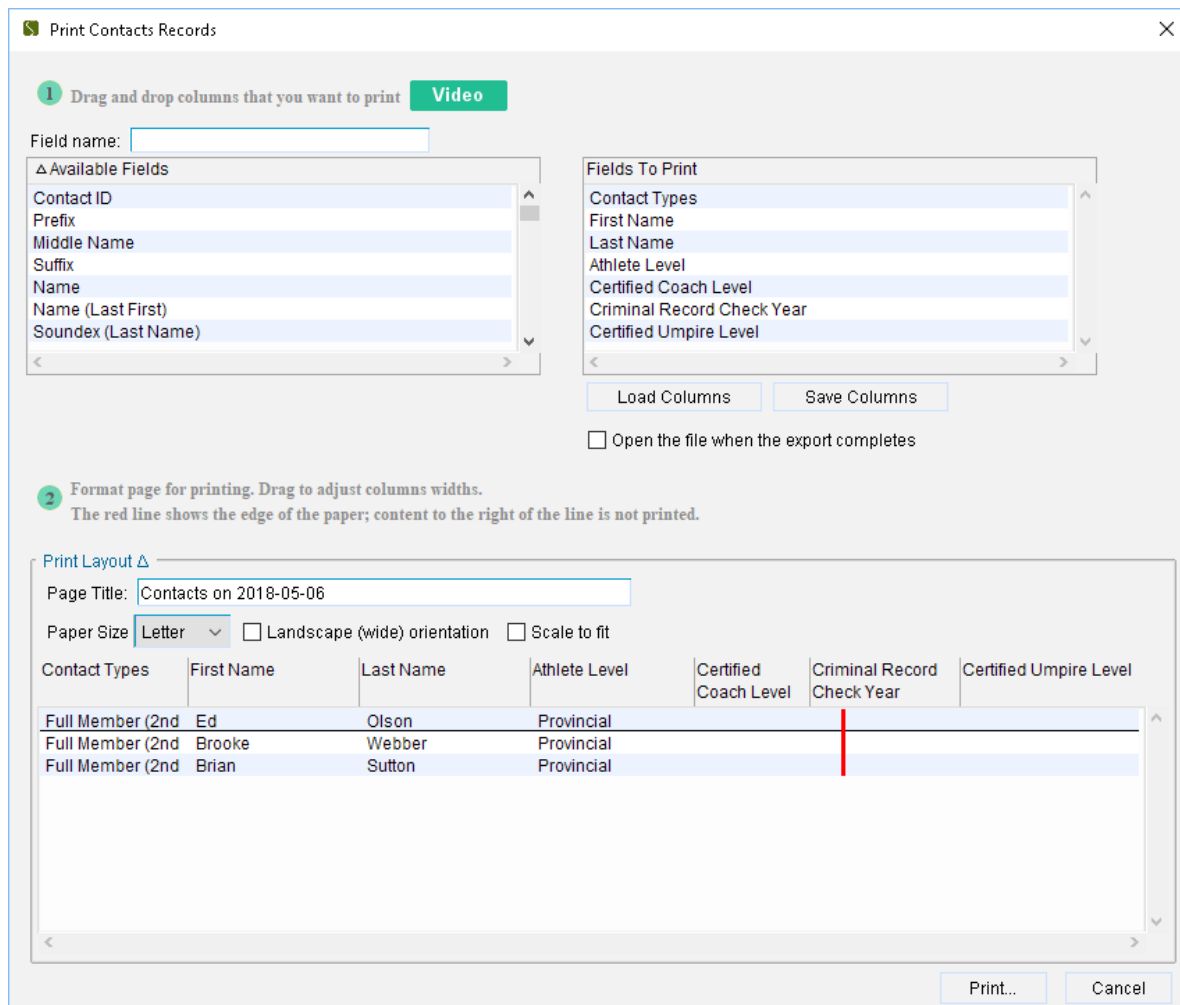
△ Contact Types	△ First Name	△ Last Name	△ Athlete Level	△ Certified Coach Level	△ Criminal Record Check Year	△ Certified Umpire Level
▽ Full Member	Ed	Olson	Provincial			
▽ Full Member	Brooke	Webber	Provincial			
▽ Full Member	Brian	Sutton	Provincial			

At the bottom left, it states: "Entries in list: 3; Entries selected: 0".

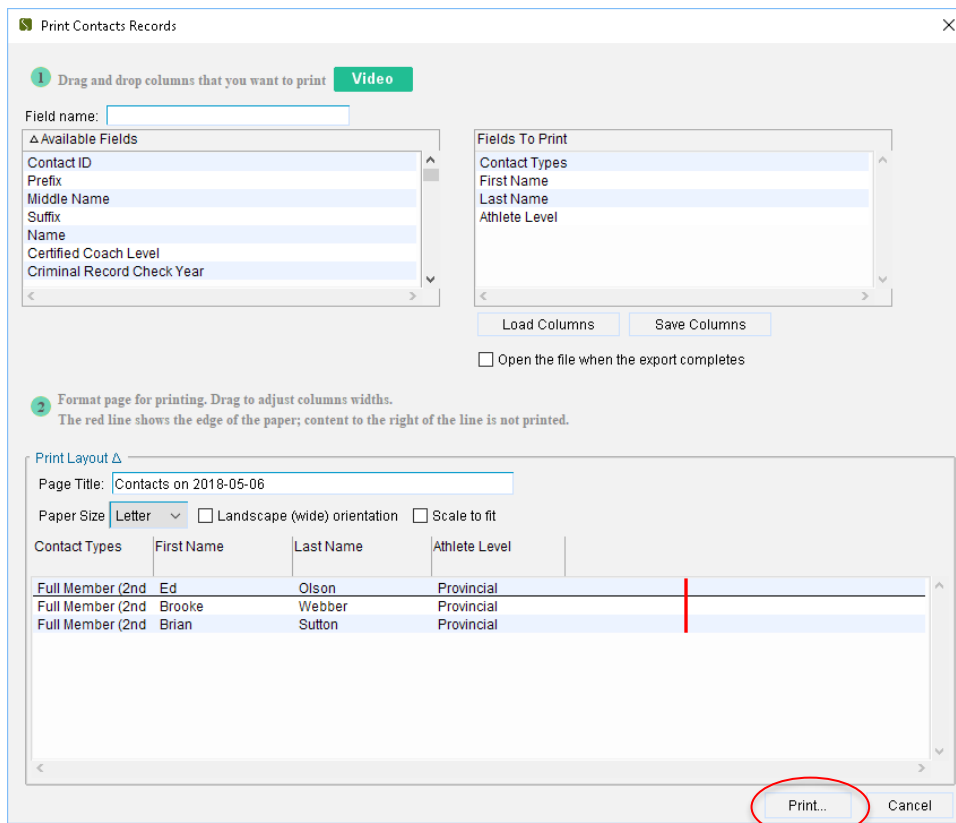
The **Print Contacts Records** window appears.

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.

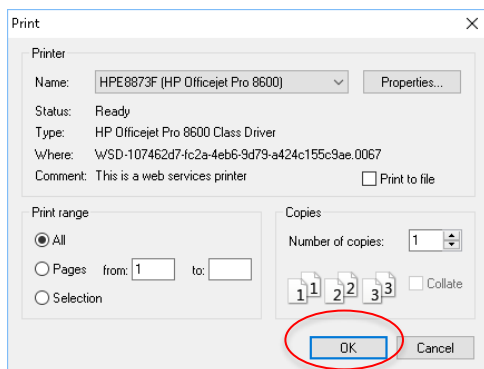
To remove fields not required, left click your cursor on the field and drag to the left.



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



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

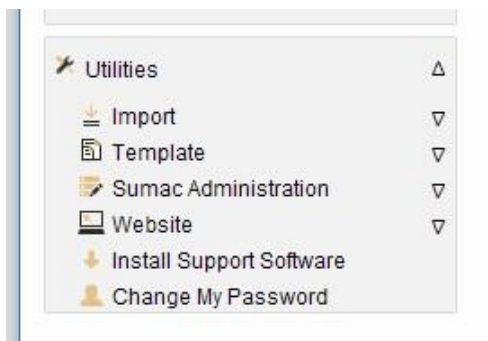


Miscellaneous

Relations Screen: not currently used

Business Address: not currently used, however if a club wishes to use these fields they may.

Utilities



Most of these items will only be used as requested and supervised by the Membership Committee

Help Videos & Resources

Selecting Help Videos & Resources will take you to the Sumac website where you will find useful video tutorials about using many features of the software, such as sending emails and reporting. You will not find Bowls BC specific screens or Bowls BC help on these web pages.

It is strongly advised that you review the help videos especially those describing

- Search & Queries
- Send Email
- Reporting

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.**