Memberships: How to Add a New Member

Speech	Cursor Actions
Every member of your organization *must* be a contact in your database before you can record their membership information.	
Perhaps someone named Brian Medley stopped by today and asked to purchase a membership. It is a good idea to first search your Contact List to see if Brian is already a contact in your database.	
In your Sumac console, click Contacts.	Show console. Click Contacts
Click the Last Name column title to sort your contact list by last name. Then start typing the first for letters of Brian's last name to search for him.	Click Last Name Type M-E-D-L-E-Y
As you can see, Brian is *not* already a contact in this database, so before we can record his membership information, we need to create a contact record for Brian.	Point to list of contacts showing that Brian is *not* there
Click New to begin adding Brian as a contact.	Click New
Enter some basic contact information about Brian.	Enter First Name: Brian Last Name: Medley Email: brian.medley@gmail.com
Then click OK to move on to the new contact record for Brian.	Click OK
Here we can enter any other information we have about him, like his address, for example.	Go to Residence Address tab Street A: 123 Main Street City: Toronto State: ON Postal Code: M5A 1Z8
Once you've entered all of Brian's information, click OK to save his contact record.	Click OK
Now that Brian is a contact in the database, you can create a membership record for him. You can add a new membership record in the Memberships list, but it's often much easier to add the membership record right from the Contact List.	
Select Brian in your Contact List, then click Add to Contact.	Click Add to Contact
Click Membership	Click Membership
And Sumac opens a new membership record, filling in Brian's name for us.	Point to Brian's name in Member field.
Specify a Billing Contact if it's necessary,	Point to Billing Contact.
Or mark that this is a Gift Membership, if that's appropriate.	Point to Gift Membership
Choose the Membership Type.	Open Membership Type menu.

For this example, let's say Brian is purchasing an Adult Membership.	Choose Adult
Notice that Sumac filled in the Start and End Date for you.	Point to Start and End Date.
However, if you need to specify a different date range for this membership record, you can override this.	Click in End Date. Type: 2014-12-31
Notice that Sumac also filled in the Fee for this membership record.	Point to Fee field.
If the Brian also wanted to make a donation at the time of purchasing his membership, you could enter a Donation amount here as well.	Point to Donation Amount field.
Sumac calculates the total amount for you.	Point to Total Amount
You can specify the Payment Type for this membership,	Choose Payment Type: Cash
Or even link it to a Campaign.	Point to Campaign
The Renewal Complete check box indicates if the renewal cycle processing has been completed for this particular membership. Since it is his first membership, and he's paying by cash today, we can put a check-mark here.	Put check mark next to Renewal Complete
You can allocate the payment for this membership to up to three accounts, which might be necessary for accounting purposes. If you require this, choose the appropriate account from the Account drop-down menu, and specify the portion of the membership fee that should go to that account.	Choose First Account: 4510 Individual Portion: 50.00
Click OK to save the membership record in your database.	Click OK
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