

Masonic Membership Solutions User Guide

Support for the MMS system is:

MMS: Masonic Membership Solutions

Chapters, Councils and Other Masonic Bodies

Phone : (214) 888-0220

Administrator: Robert Bigley & Marci Martinez

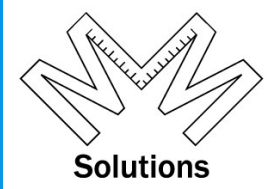
Email: manager@MMS1.us

Grand Encampment of Knights Templar Commanderies

Phone: (713) 349-8700

Administrator: John Elkinton

Email: john@gektusa.org



Masonic Membership Solutions User Guide

Secure Log In

The secure login page is the start of MMS.

Masonic Membership Solutions

Login

User Name: *

Password: *

Submit

[Register for new User Account](#)

[Recover your forgotten Password](#)

[Request Access](#)

IMPORTANT MESSAGES TO USERS ----- please read:

MMS as of 01/26/2021 has MOVED to CHROME
For the best performance and ALL functionality along with MMS technical support this Application must be used in CHROME.

Components

- Username – Name assigned to user to log into system
- Password – Password assigned to log into system
- Register for new User Account
- Recover your forgotten Password
- Request Access

To access Secure Login, open a web browser and enter www.masonic-web.com to link to the secure login page.



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Request Access

- How does one request access:

URL: www.masonic-web.com

(1) From the URL address select "Register for new User Account."

- Complete the form < click Create User >

(2) You will receive e-mail to validate email address.

- Validate address then < click Request Access >

(can also be done through URL)

- Complete "Request Access" Form < click Submit >

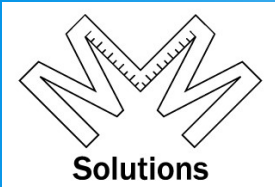
(3) You will get email from Admin who either approves or disapproves your request.

(4) If approved go to URL and log in - complete Disclaimer.

The screenshot shows a login form with a dark blue header containing the word 'Login'. Below the header are two input fields: 'User Name:' with the text 'cgroth' and 'Password:' with a masked password '.....'. A green 'Submit' button is positioned below the password field. Underneath the button are three blue links: 'Register for new User Account', 'Recover your forgotten Password', and 'Request Access'. The 'Request Access' link is highlighted with a red oval.

- Once the request comes in:

- o Knights Templar – GEKT will contact the Grand Recorder to receive approval
- o All others not Knights Templar – The MMS support team will contact the Grand Recorder/Secretary to receive approvals.



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Access is assigned in two BASE User Groups:

- Edit – allows user to update all data that his ID gives him rights to
- View – allows user to run all reports that his ID gives him rights to

Within that BASE User Group the ID is assigned to user groups:

N = National

S = State

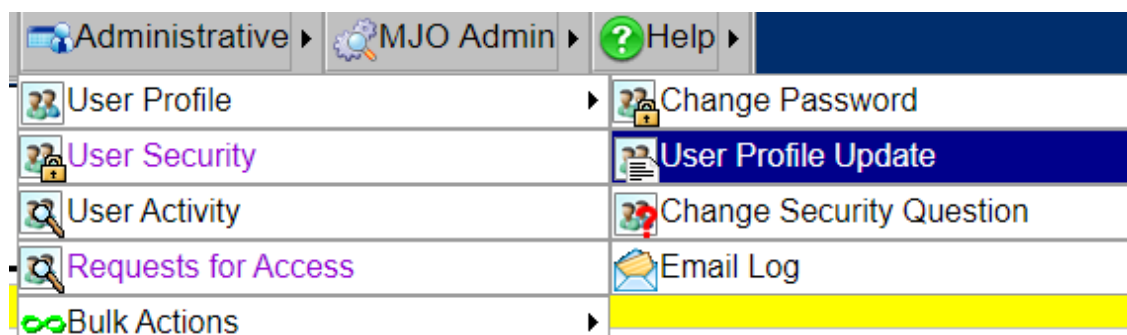
L = Local

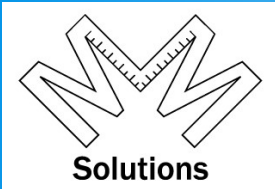
You can always check your access rights by clicking on “Profile View”

User ID = [REDACTED]		
Email = [REDACTED]		
Group = [REDACTED]		
National	State	Local
Knights Templar	ALL	ALL
AMD-Grand Council	ALL	ALL
Blue Lodge	ALL	ALL
Cryptic Masonry	ALL	ALL
KTP - Grand College	ALL	ALL
Royal Arch Masonry	ALL	ALL
SRICF-The High Council	ALL	ALL
Note: If anything is incorrect please contact System Administrator		

When ID's are setup they are assigned an email address, which has nothing to do with the email address on the member's record. ID's are not linked to membership records.

- Because of this the User can always change that email address that is assigned to his ID by clicking on *Administrative / User Profile / User Profile Update* from the home screen.





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- This will bring up the user id's personal profile and from there the user can update at that time.

User Profile Update

User Name: cgroth

First name:

Last name:

E-mail address:

Primary Phone International Number

Secondary Phone International Number



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User ID's

- When logging in if you enter the incorrect **UserID** you will get a message

Login

The User Entered is not a valid registered ID - Please double check or contact the System Administrator

- When Logging in if you have the correct ID but **wrong password** you will get a message

Login

The User Password for the User ID entered is not correct - Please double check or contact the System Administrator

- System will lock the user ID out of system if user tries to access 3 times with incorrect password, upon doing so a message appears on screen for user to contact System Administrator who will unlock ID and will request the system send user an email with a new password, as we cannot see passwords.
- Also every quarter we deactivate all USER ID's that have not been used in over 12 months, when the user logs in after we have deactivated they will get a message to contact System Administrator.
- Because of the clear messages there is no such thing as *"the system will not let me in and I don't know why"* – messages are in red at the top tell user exactly why they cannot get in.
 - A user may request on the home screen a new Password anytime which will go back to the email address they registered with.

Login

User Name:

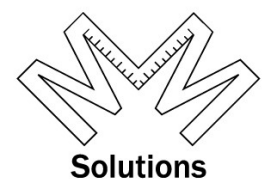
Password:

Submit

[Register for new User Account](#)

[Recover your forgotten Password](#)

[Request Access](#)



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News Feature

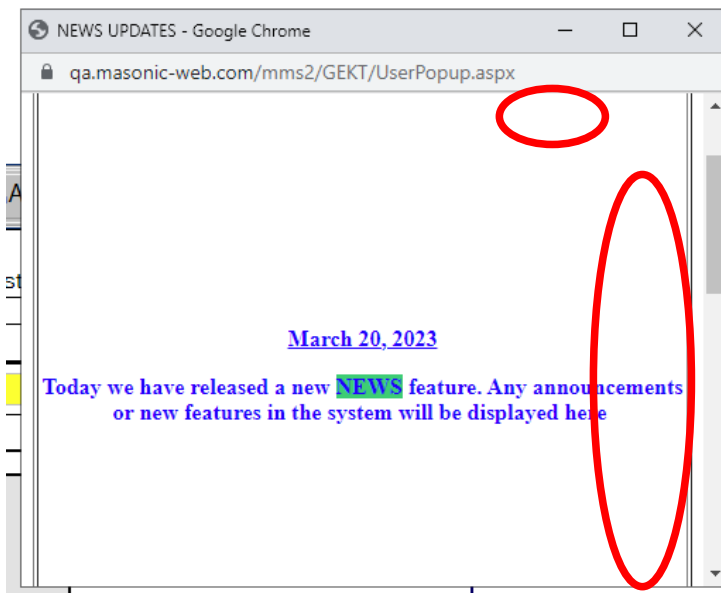
The “NEWS” button in MMS will be used to announce new features or updates within the MMS database.

At the center of the top of your screen you will see:



Once you click on the “NEWS” button you will see a pop up window with a date and the overview announcement.

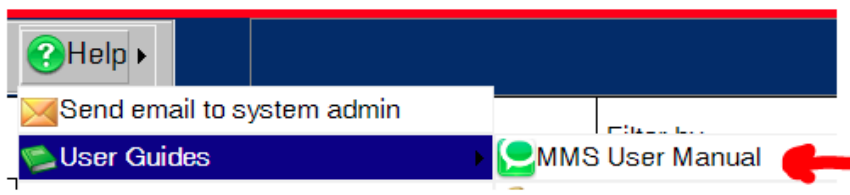
To make the window larger you can click on the square and scroll up and down with the scroll bar. To exit click the X top right on the pop up.

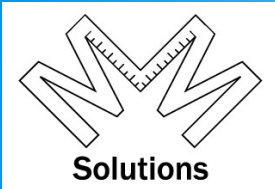


In some cases, we will give you more detail and point you to the User Manual.

To get to the User Manual follow the steps below

HELP – User Guides – MMS User Manual





Masonic Membership Solutions User Guide

Click on the Open: MMSUserManual to open the document.

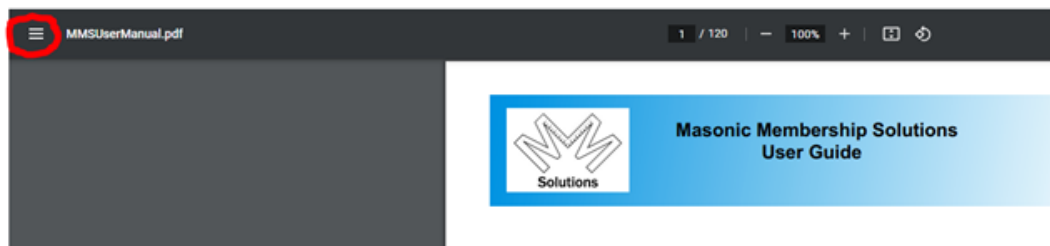
Help Guide

Open: "MMSUserManual.pdf" 

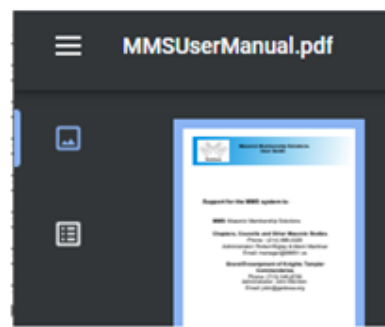
To open the above PDF file,
you will need Adobe Reader
installed on your PC.

If needed, you may ...
[get "Adobe Reader" from here](#)

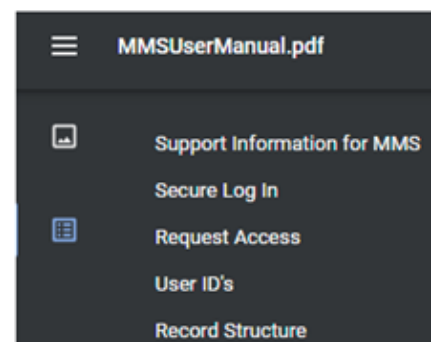
Once the document is open you can click on the lines to open the Index



This will open up 2 items (Thumbnails) – (Index)
Thumbnails – shows image of pages down left side



Index - This will give you a list of items in the document
down the left side. To go to a subject you can click on the
title and the document will go to that subject.





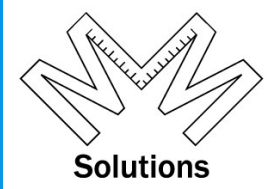
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Structure of a Record

- Everything in the database is stored at a N S L structure
 - N – National
 - S – State
 - L – Local
- Data within that structure for a member is a ONE-to-Many relationship
 - One People record – contains Profile data
 - People record has MANY memberships
 - Memberships are stored at the N S L level and have:
 - Current and historical status
 - Orders / Degree dates
 - Honors
 - Elite Categories
 - Offices
 - Donations
 - Committees
 - Dues data
 - Data on other Organizations not in Database

This is the People Record containing the members Profile data:

<input type="button" value="Save"/> <input type="button" value="Cancel"/>		Membership types used: Regular	
Prefix <input type="text"/>	*Date of Birth <input type="text" value="1/1/1900"/> <small>mm/dd/yyyy</small>	Phone-Home <input type="text"/>	<input type="checkbox"/> Intl
*Last <input type="text" value="Test"/>	Birth Location <input type="text"/>	Phone-Work <input type="text"/>	<input type="checkbox"/> Intl
*First <input type="text" value="Corrie"/>	Date of Death <input type="text"/> <small>mm/dd/yyyy</small>	Phone-Cell <input type="text"/>	<input type="checkbox"/> Intl
Middle <input type="text"/>	<input type="button" value="Edit"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>		
Suffix <input type="text"/>			
Preferred First Name which member wishes to be called if different than First Name supplied above.			
<input type="text"/>			
Normally, mail sent to the member will be addressed, first middle last; but, if the member wants mail to be addressed using a different first name, please supply the complete alternate name below along with last name.			
<input type="text"/>			
Notes <input type="text"/>	Email-Home <input type="text" value="cgroth@mjodata.com"/>		
	Email-Work <input type="text"/>		
	Spouse's Name <input type="text"/>		
	Spouse Birth Date <input type="text"/> <input type="text"/>	<input type="checkbox"/> CT (Companion of the Temple)	
		<input type="checkbox"/> SA (Sweetheart Award)	
		<input type="checkbox"/> LC (Lady of the Council)	
	Children <input type="text"/>		
	Job Status <input type="text" value="Current"/>		
	Employer <input type="text"/>		
	Job Title <input type="text"/>		



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System Rights

Training is available :

- o One on One – phone or shared session
- o In scheduled meeting on site – Costs to be covered

Who can have access to the system for Knights Templar:

- o The normal process for access to MMS is given to the following Sir Knights:

View Only Rights

- Grand Encampment Current Officers
- Grand Encampment Department Commanders
- Other Committee Chairman as requested – approved by Grand Encampment.

View Only Rights– if requested and approved by the Grand Recorder:

- Grand Commander
- Deputy Grand Commander
- Grand Generalissimo
- Grand Captain General
 - o Other special access if requested
 - Voluntary Campaign Chairmen
 - Membership Chairmen
 - Regional / District / Divisions – Representatives within a state

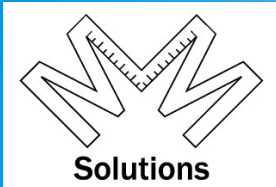
Edit Rights:

- All Grand Recorders
- Assistant Recorders or Office staff.
- Constituent Recorders with approved access by Grand Recorder
- Assistant Recorders with approved access by Grand Recorder
- Grand Encampment Office
- Knights Templar Eye Foundation State Chairman
- Knights Templar State / Membership Chairman

Who can have access for other Masonic bodies:

Edit Rights:

- All Grand Recorders / Grand Secretaries
- Local Recorders / Secretaries with approved access by the Grand Recorder / Grand Secretary
- All others with approval from the Grand Recorder / Grand Secretary



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Profile Update

Individual members in the Knights Templar wanting to update their profile data can do so at any time.

- This is done by going to the GEKT web site <http://www.knightstemplar.org/>
 - Within the pulldowns select MMS

Or you can go to <https://www.masonic-web.com/mms/memberbio/default.aspx>

This will bring the member to the MMS system Personal Identification screen, which will allow them to gain access to their individual data.

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Personal Identification Verification - Required for Secure Entrance

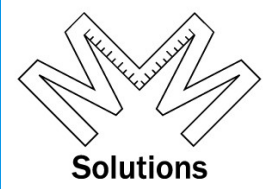
First Name:	<input type="text" value="John"/>	Membership#:	<input type="text" value="xxxxx"/>
Last Name:	<input type="text" value="Sample"/>		
Birth Date:	<input type="text" value="1/1/1900"/>		mm/dd/yyyy

All fields are required.
Membership# is obtained from your dues card.

[BackToUI](#)

Click "Verify My Identity" it will populate the screen with the members personal data.

The MMS membership number is obtained from all dues cards generated from the MMS System



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Save Changes Close Secure Area [BackToUI](#)

Member Information

Prefix Name

 Preferred First Name Birthday

Contact Information

Home Phone Intl. Home Email
 Work Phone Intl. Work Email
 Cell Phone Intl.

Personal Information

Employer Job Status
 Job Title
 Spouse's Name
 Spouse's Birth Date CT (Companion of the Temple)
 SA (Sweetheart Award)
 LC (Lady of the Council)
 Children's Names Like: Billy, Sally, Megan

Change Home/Primary address

Address is Certified

*Country
 Type
 *Address

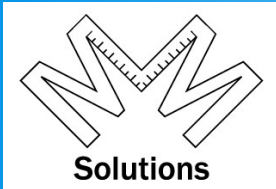
 *City
 *State
 *Zip

If the desire is to send mailings to the member at a different address other than the Home/Primary noted above, please supply that address below so that address can be used for mailings.

Change Alternate address

*Country
 Type
 *Address

 *City
 *State



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Change Seasonal (vacation) Overrides all other addresses for dates specified

*Country: USA

Type: Seasonal

*Address:

*City:

*State:

*Zip:

Optional selections ... (Only for Knights Templar memberships)

Knights Templar Magazine

Members with foreign addresses will not receive a copy mailed directly through the US postal system, but the monthly magazine is always available online at <http://www.knightstemplar.org> or you can download the APP as noted below.

- Send the monthly magazine through the US postal system
- Monthly magazine will be viewed on-line or through the Mobile APP for YOUR SMART Phone.

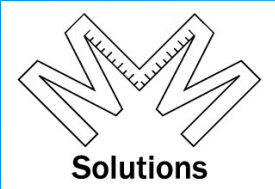
Visit: <http://www.knightstemplar.org> to Download for Apple and Android.

Memberships, Status & KTEF Sponsorships (if Knights Templar)

Member#	National	State	Local	Status	KTEF*
1517659	Knights Templar	West Virginia	1 - Wheeling	Knighted	

*KTEF key: LS-Life Sponsor, P-Patron, AP-Associate Patron, GCC-Grand Commanders Club, GMC-Grand Masters Club
 If you see any issues with your membership please contact your local Recorder

Save Changes Close Secure Area [BackToUI](#)



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MMS Header



Masonic Membership Solutions 3.0.00
Terms of Use
Users Online = 15

Live2

cgroth
Profile View



LogOut

Components



By clicking on Logo it's a quick Link to **"Home"** or **"Search for Member"** and will Clear out Screen

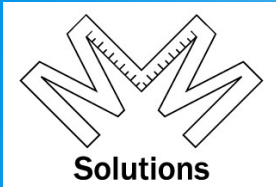
Masonic Membership Solutions 3.0.00(a)
Terms of Use
Users Online = 2

Title and Version
Link to **Disclaimer**

cgroth
Profile View

Displays User Name and a way to View your profile Information which shows your access rights.

User ID = [REDACTED]		
Email = [REDACTED]		
Group = YR - Local EDIT		
National	State	Local
Knights Templar	Kentucky	12 - Louisville-DeMolay
Knights Templar	Missouri	39 - Ascension
Knights Templar	Oklahoma	3 - Oklahoma
Cryptic Masonry	Oklahoma	18 - Alpha
Royal Arch Masonry	Oklahoma	7 - Cyrus
Note: If anything is incorrect please contact System Administrator		



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LogOut

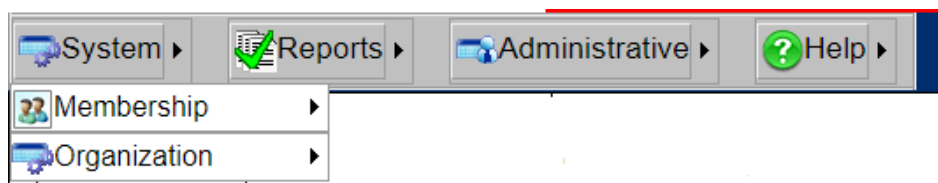
LogOut of System



There are 4 Menu Tabs shown on the home screen

1. **System** – shows you different system categories
2. **Reports** – provides 5 base sections to run reports
3. **Administrative** – administrative tasks
4. **Help** – contains user guides & documentation

1. System – shows you system tasks

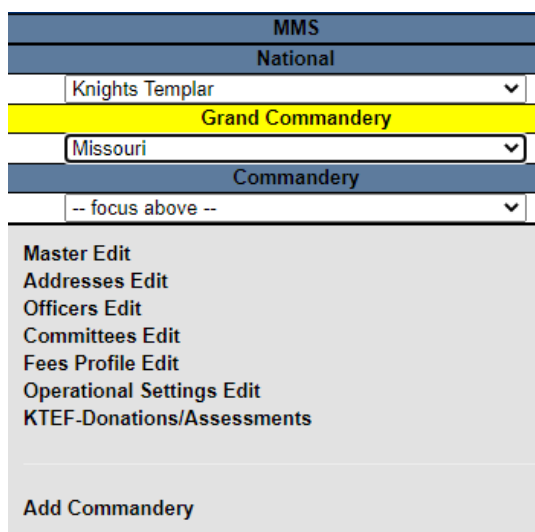


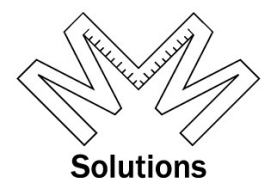
Membership

- **Find a Member** – used to find a member – clears current screen and returns you to home, same as selecting Logo.

Organization

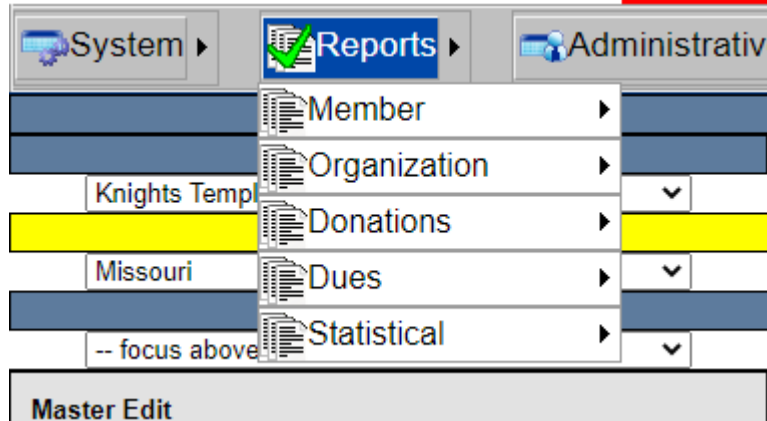
- **Maintenance** – allows for updates to be done to the National, State or Local body information based on your access rights.



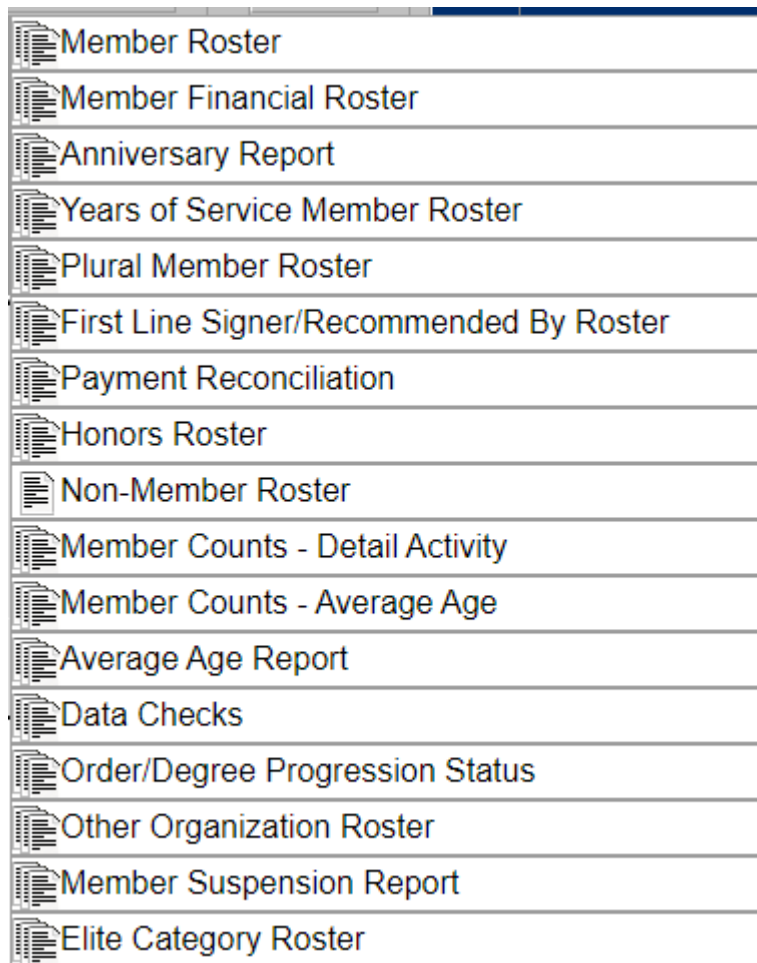


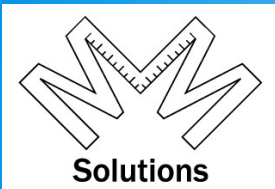
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- **Reports** – shows you all the different categories which contain reports.



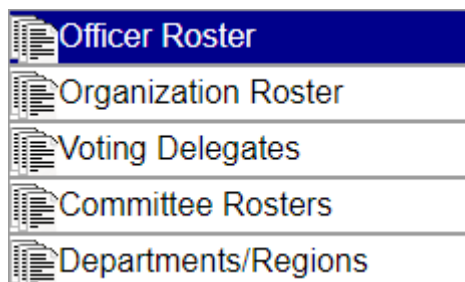
Member –provides a list of all the reports that are available at the member level.



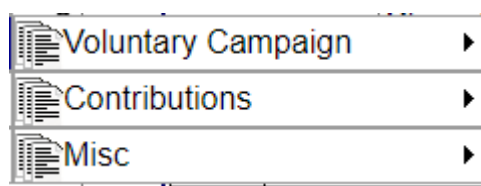


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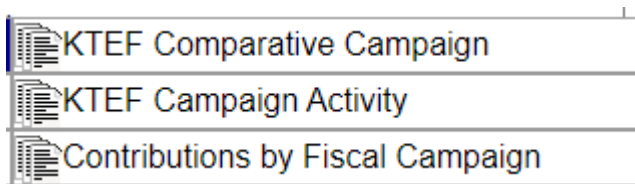
Organization –provides a list of all the reports that are available at the organization level.



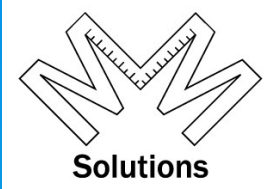
Donations –provides a list of all the reports that are available to track donations. Knights Templar Only



- **Voluntary Campaign** - Knights Templar Only

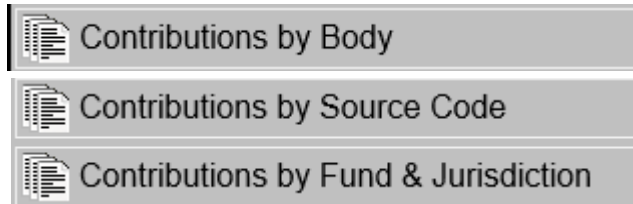


- **KTEF Comparative Campaign** – shows campaigns side by side.
- **KTEF Campaign Activity** – the base report for all contributions that are received during a campaign.
- **Contributions by Fiscal Campaign** – shows you by Commandery where the funds were credited.

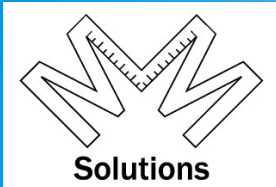


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- **Contributions - Knights Templar Only**



- **Contributions by Body** – shows all contributions posted to an individual body within a specific date range.
- **Contributions by Source Code** – shows all contributions within a date range based on source code assigned to the individual contribution.
- **Contributions by Fund & Jurisdiction** – shows all contributions within a jurisdiction based on a date range and fund allocation.



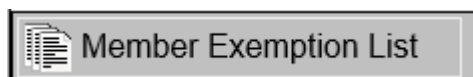
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- **Misc. - Knights Templar Only**



- **KTEF Exemptions Roster** – shows by jurisdiction the KTEF Exemptions for Active/Inactive as of a specific date.
- **LS/P/AP/GC/GM Percentages** – shows by jurisdiction the percentages based on active members for each program.
- **Life Sponsor 100% Roster** – shows by jurisdiction those local bodies that are currently at a specific percentage range.
- **Grand Master/Commander Report** – shows by jurisdiction the Grand Commander and Grand Master Clubs held by individual members, and for Grand Commanders Club the current accrued amount applied to the club.

Dues - Knights Templar Only

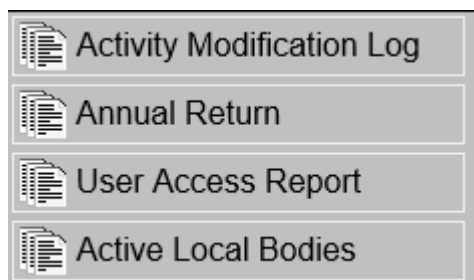


- **Member Exemption List** – shows by jurisdiction the individual exemptions that are being applied for Dues.

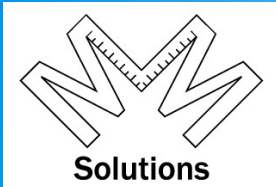


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- **Statistical**

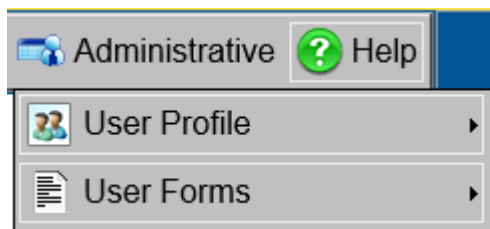


- **Activity Modification Log** – shows by jurisdiction the individual activity that has been done to each member and who did it.
- **Annual Return** – runs the Annual Return based on a date range, and provides a summary of the numbers and supporting data for each of the return categories.
- **User Access Report** – shows by jurisdiction within a date range what users have rights and the last time logged in and if they have made any changes.
- **Active Local Bodies** – shows by jurisdiction the number of local bodies in the system.

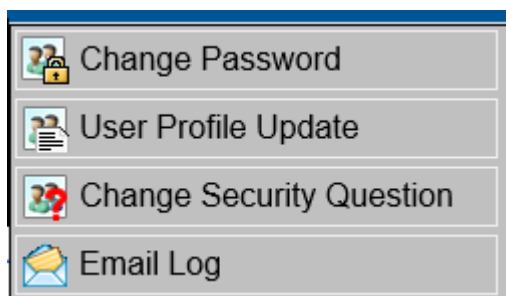


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- **Administrative** – shows you all the different administrative functions available to you as a user.

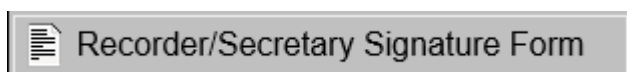


User Profile – shows the different profile tasks which you can update.

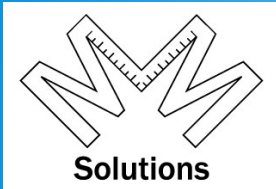


- **Change Password** – allows you the user to change your password.
- **User Profile Update** – allows you the user to change some of your profile data.
- **Change Security Question** – allows you the user to change your security question.
- **Email Log** – tracks all emails to and from the system administration.

User Forms – shows the forms that are available within the system.

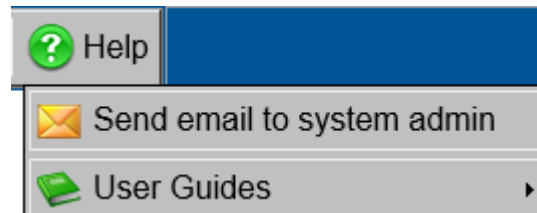


- **Recorder / Secretary Signature Form** – used by local recorders and secretaries so that their signature can be applied to the dues cards.



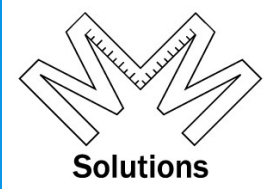
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- **Help** – gives you the ability to review User Guides and current and archived documents.



Send Email to System Admin – allows you the user to send an email to system admin.

User Guides – Searchable PDF Guide.



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Member Search

The Member Search page is the first screen seen when logging into MMS. There are 3 levels in MMS, National, State, Local, you can only search for members you have rights to.

- * National Users have access to all the members in their National body.
- * State Users have access to all the members within their Grand body.
- * Local Users have access to all the members within their Local body.

Those with editing privileges can make changes to the records, for example, change status, change address, add officers, honors or elite categories. Those with view access can only view the records.

System | Reports | Administrative | Help

First: Last: Member#:

You do not need to type in the entire name to search for a person. You can type in a few letters from the first name and a few letters from the last name. If there are too many found then add a few more characters of the name to narrow the search down.

- o Along with Name or Number search you can limit it by where the member lives.
 - Hint – not something to be using on initial search.
- o In the search area is a special section for those National Bodies that seem to have their own National Number.
 - Currently only KTP

System | membership | Find a member

National Body: Filter by:

National Number:

There is also a way to search by email or phone number.

- On the home screen you can click on the Email or Phone Number
- Once you click you can then search by Wild or Exact

Search By

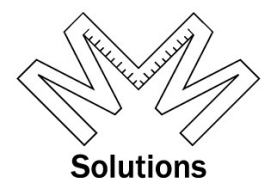
[Email]

[Phone Number]

Search by E-mail address: Match Wild Exact

Search by Phone: Match Wild Exact

Search Clear Search Normal



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- In this area you have the ability to limit the number of records that are returned on a search and how the match should be made.
 - Return – we suggest 100
If the search returns more than the 100 you will get a message



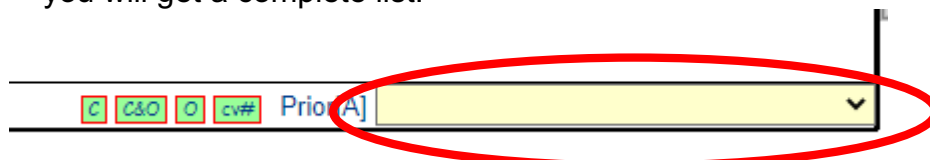
- Match – we suggest Wild – this addresses misspellings and allows you to limit the number of characters you have used in the search

Return <input checked="" type="radio"/> 100 <input type="radio"/> 500 <input type="radio"/> 1000 <input type="radio"/> All	Match <input checked="" type="radio"/> Wild <input type="radio"/> Exact
--	---

- The Photo section is used when you search for a record, if the record found has a photo it will appear.



- The blue bar (Prior) on the right allows you to go back and select individuals that you have searched for in the past. By pulling it down you will get a complete list.



Selecting "Prior" allows you to change the order of the pulldown from most recent to alpha order.

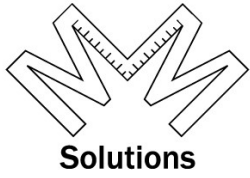
[Prior\[A\]](#)

- The yellow bar will display the record found from the search entered.

Found	Person	DOB	Home Address	City	State	Zip
26	Sample, A. C.	01/01/1900	125 N Cleveland Ave	Brookhaven	MS	39601-2713

Your search found [26] members. Above is the first member found. To see the other members, click the down arrow to the right of the yellow box.

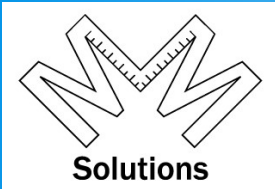
- The FOUND area will tell you how many records it found.
- Using the pull down on the right of the yellow bar will display all the records found.



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By selecting the name you would like to look at, it will bring up the full Profile data for this member.

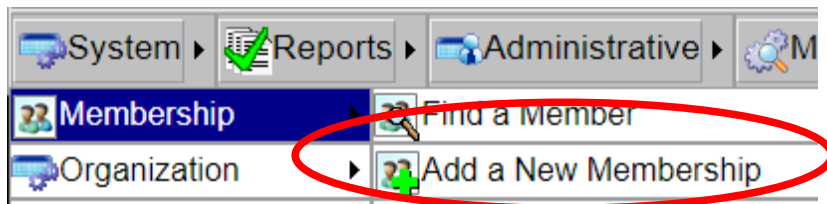
Save Cancel		Membership types used: Regular	
Prefix <input type="text"/>	*Date of Birth 1/1/1900 <input type="text"/> mm dd/yyyy	Phone-Home <input type="text"/>	<input type="checkbox"/> Intl
*Last Test <input type="text"/>	Birth Location <input type="text"/>	Phone-Work <input type="text"/>	<input type="checkbox"/> Intl
*First Corrie <input type="text"/>	Date of Death <input type="text"/> mm dd/yyyy	Phone-Cell <input type="text"/>	<input type="checkbox"/> Intl
Middle <input type="text"/>	Edit Save Cancel		
Suffix <input type="text"/>			
Preferred First Name which member wishes to be called if different than First Name supplied above.			
<input type="text"/>			
Normally, mail sent to the member will be addressed, first middle last; but, if the member wants mail to be addressed using a different first name, please supply the complete alternate name below along with last name.			
<input type="text"/>			
Notes <input type="text"/>	Email-Home: cgroth@mjodata.com		
	Email-Work: <input type="text"/>		
	Spouse's Name: <input type="text"/>		
	Spouse Birth Date: <input type="text"/> <input type="text"/>	<input type="checkbox"/> CT (Companion of the Temple)	
		<input type="checkbox"/> SA (Sweetheart Award)	
		<input type="checkbox"/> LC (Lady of the Council)	
	Children: <input type="text"/>		
	Job Status: Current <input type="text"/>		
	Employer: <input type="text"/>		
	Job Title: <input type="text"/>		



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Add a New Member

To add a new member, click on System, Membership, “Add a New Membership” menu item.



User must search for the “new” member before proceeding in the system to ensure duplication of the person does NOT occur. The search filters on this screen are identical with those on the Find A Member search except you will be searching the entire database regardless of your National Body.

Tip in Search: Many times when you are doing a search a member is really on the database but spelled differently, this results in adding duplicates to our database. To prevent this many times you do not need to completely type out the members name. Example: Robert W. Armstrong - you can locate this by just "Ro" as first name and "Arms" as the last name. This will bring you back a list of possible members, from the list just search through, if you get too many then increase your search by adding additional characters.

Please search your 'new member' to ensure they are not already in the system.

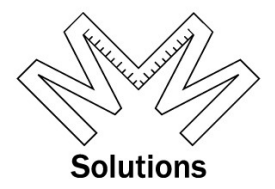
First Dylan (First Name ONLY – no prefix or Middle Name/Initial)	Last Test (Last Name ONLY – no suffix)	Search Clear	Return <input type="radio"/> 50 <input checked="" type="radio"/> 100 <input type="radio"/> 500 <input type="radio"/> All	Match <input checked="" type="radio"/> Wild <input type="radio"/> Exact
---	---	-----------------	--	--

No matches were found

[I would like to ADD a new person and membership to the database](#)

After searching the database the system will return records matching what you have entered as the First and Last Name, below you will see two examples of what is returned and what steps to follow next:

- Example 1** - is what is returned if a match has been found.
- Example 2** - is what is returned if no match has been found.



Masonic Membership Solutions User Guide

Example 1 – Match

Because the system has found members within the full database it will return the total records found along with a complete list of each record with their member affiliations and status within that body. If you do not find the record follow the procedures outlined below in Example 2 – No Match. If you have found the record that you wish to append (add) another membership to, click on that record.

Please search your 'new member' to ensure they are not already in the system.

First Corrie <small>(First Name ONLY – no prefix or middle Name/Initial)</small>	Last test <small>(Last Name ONLY – no suffix)</small>	Search Clear	Return <input type="radio"/> 50 <input checked="" type="radio"/> 100 <input type="radio"/> 500 <input type="radio"/> All	Match <input checked="" type="radio"/> Wild <input type="radio"/> Exact
---	--	-----------------	--	--

To append a membership to a person below, click on their record OR **If all the data is correct and you CANNOT find the member below in the list of matches click the following: I would like to ADD a new person and membership to the database**

Your search returned 1 people.

test, Corrie	unknown, unknown, unknown 00000, unknown	Born unknown
AMD-Grand Council	A - Grand Master's	A - Grand Master's
	Invested-Regular on 12/10/2020	Member# 6013719

Your search returned 1 people.

Once the record is selected you will need to select the **“National”** body from the pull down, because this pull down is controlled by your permissions in many cases it will be defaulted based on these permissions.

Return to list of matches Cancel

You are adding a membership to the new person that you just added to the database.

In the following body:

National	State	Local
-- select national body --	▼	▼

Continue Cancel

Selected person:

test, jim	Pkwy S, Westminster, MD 21157-3066	Born unknown
------------------	---	---------------------



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After you have selected the national body based on your permissions the state and local body will be defaulted. If you have state permissions you must select the **“Local”** body you want to add the membership to.

Because you are adding a membership to the current member you will need to select **“Select Status”** on how you wish to append (add) this new membership to the member.

System > membership > Add new membership

Please search your 'new member' to ensure they are not already in the system.

First <input type="text"/> (First Name ONLY – no prefix or Middle Name/Initial)	Last <input type="text"/> (Last Name ONLY – no suffix)	<input type="button" value="Search"/> <input type="button" value="Clear"/>	Return <input type="radio"/> 50 <input checked="" type="radio"/> 100 <input type="radio"/> 500 <input type="radio"/> All	Match <input checked="" type="radio"/> Wild <input type="radio"/> Exact
--	---	---	--	--

After you have Selected Status and clicked on **“Continue”** the system will do a double check on the body you are appending (adding) this membership to, and if the system finds any members that are a potential match based on the last name it will list them and ask you to confirm that this member is not already in your local body.

You are adding a membership to the new person that you just added to the database.

In the following body:

National	Grand Commandery	Commandery	
Knights Templar ▼	Maryland ▼	1 - Maryland ▼	Petitioner/Candidate ▼

Use the Petitioner/Candidate selection when Petitioner and Candidate information are unavailable but ALL Orders information is available.

Caution - You are about to add new record to the system for:
test, corrie [DOB] 01/01/1900

But currently, in the database for this local body, are the following members that "look" like the member you are adding.
 Please verify you're not adding a duplicate.

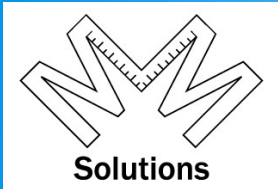
Name	Born	Membership#	Status	Address
Test, Corrie	01/01/1900	1508718	Candidate	1101 Business Pkwy S, Westminster, MD 21157-3066

I have double checked and **none** of the above Commandery Members are **the same membership** I am adding.

I've reviewed the above. The new membership **does appear to already exist** in the Commandery. I **will not** add a membership at this time or I need to do further investigation.

Person:

test, corrie	1101 Business Pkwy S, Westminster, MD 21157-3066	Born unknown
--------------	--	--------------



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If you find that this membership is already in the local body click **"Cancel"**. If you have done a double check and you want to continue to add this membership click **"Continue & Save record"**. Once you have clicked **"Continue & Save record"** the Member Add Orders screen will appear. At the top of this screen is the member's current orders with dates and the location where they were taken. These are for information display only and only those with permission to that Local body can change the date and or location, so if you see a mistake please let your Grand Recorder or System Administrator know.

Test, Corrie [DOB] 01/01/1900 [Home] 1101 Business Pkwy S, Westminster, MD 21157-3066

National Body: Knights Templar

Current Date of Birth Listed: 01/01/1900 Change Date of Birth to: 1/1/1900 Current Date of Birth is unknown, please update - but if unknown leave 1/1/1900

Orders	Date	Grand Commandery	Commandery	Comments
Order of the Red Cross		Select a state		
Order of Malta				
Order of the Temple (Knighthood)		Alabama	4 - Montgomery	

No orders information for this person. All orders up to Order of the Temple must be earned before this person can be Affiliated.

Date	Grand Commandery	Commandery	Comments
Affiliated	Alabama	4 - Montgomery	

First Line Signer:

Save Cancel Reset

The member status that you have selected prior to this screen appears bottom left. You only need to add the Date of that status into the system and the person that was the First Line Signer of the application.

The pull down for **"First Line Signer"** may not have all members going back in history or if you do not know who signed it, you can select **"Unassigned"**

Orders	Date	State	Local	Comments
Order of the Red Cross	04/29/1972	Illinois	36 - Bethel	
Order of Malta	04/29/1972	Illinois	36 - Bethel	
Order of the Temple (Knighthood)	04/29/1972	Illinois	36 - Bethel	

Date	State	Local	Comments
Affiliated	5/1/2018	Louisiana	2 - Jacques DeMolay

First Line Signer:

- Select a member
- Unassigned
- Abadie, Charles Gerard
- Adams, James Louis
- Addison II, Melvin Erwin
- Alfano, Thomas L.
- Alfonso, Manuel Raymond
- Angelo Jr., Earl Randolph
- Angelo Sr., Marcus Subroster
- Angelo Sr., Maurice Norman



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Note – the First Line Signer pull down table only contains members within the local body that the membership is being added to, it displays the names in three colors:

Black - Active members ---- Red - Deceased members ---- Gray - Inactive members

At any time prior to selecting "Save" you can click on "Reset" this will erase all your information entered but will keep you on this window, or if you select "Cancel" it will cancel out of everything you have done and back you out of this screen.

Once you have selected "Save" on the Member Add Orders screen you will be taken to the Edit Status screen, which will confirm everything has been added as you have entered it.

Test, Corrie [DOB] 01/01/1979 [Home] unknown, unknown, unknown 00000, unknown									
National: Knights Templar									
Member#	Grand Commandery	Commandery	Status	Status Date	Comment	Modified Date	Modified By		
1500360	Alabama	2 - Mobile	Knights	10/1/2018	Automatic Status upgrade, proper Order entered into the system (without Candidate information).	10/29/2018	cgroth		

A knighting letter and membership card request have been generated.
The letter and card will be mailed to the mailing address of the member in the next processing cycle.

Person: Test, Corrie; [2 - Mobile, Alabama, Knights Templar] [Membership# 1500360]

* Date of Birth: 1/1/1979 (mm/dd/yyyy)

Status: Knights * Status Date: 10/1/2018

Status Date cannot be changed from this screen please [click here](#) to go to Orders/Degrees screen.

If record is in Error and you need removed permanently with a Delete Adjustment - Contact System Administrator.

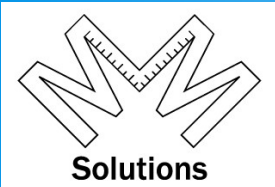
Comments: Automatic Status upgrade, proper Order entered into the system (without Candidate information).

Reprint dues card? Yes No

Auto Comment: Auto Comment to be appended upon Save

First Line Signer: Unassigned

On this screen besides changing a member's status, you are allowed to change the 1st line signer for the current status shown. If you need to change the status date please contact your system administrator who can help you.



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Example 2 - No Match

If the system has found no member within the full database that matches based on the data you have entered, **before you add this member, please double check the spelling to ensure you have entered it correctly so we don't end up with a duplicate in the database.**

If it has been correctly keyed click on:

"I would like to ADD a new person and membership to the database".

Please search your 'new member' to ensure they are not already in the system.

First Dylan (First Name ONLY – no prefix or Middle Name/Initial)	Last Test (Last Name ONLY – no suffix)	Search Clear	Return <input type="radio"/> 50 <input checked="" type="radio"/> 100 <input type="radio"/> 500 <input type="radio"/> All	Match <input checked="" type="radio"/> Wild <input type="radio"/> Exact
---	---	-----------------	--	--

No matches were found

[I would like to ADD a new person and membership to the database](#)

OR

You will get a list of names to review to see if it is the member you are looking for.

Please search your 'new member' to ensure they are not already in the system.

First Corrie (First Name ONLY – no prefix or Middle Name/Initial)	Last test (Last Name ONLY – no suffix)	Search Clear	Return <input type="radio"/> 50 <input checked="" type="radio"/> 100 <input type="radio"/> 500 <input type="radio"/> All	Match <input checked="" type="radio"/> Wild <input type="radio"/> Exact
--	---	-----------------	--	--

To append a membership to a person below, click on their record

Your search returned 1 people.

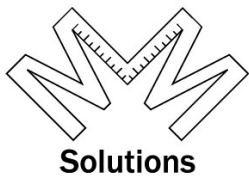
test, Corrie	unknown, unknown, unknown 00000	unknown	Born unknown
AMD-Grand Council	A - Grand Master's	A - Grand Master's	Invested-regular on 12/10/2020 Member# 6013719

Your search returned 1 people.

If all the data is correct and you CANNOT find the member below in the list of matches click the following:

[I would like to ADD a new person and membership to the database](#)

Use the scrollbar at the right to view all matches.



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After clicking on the add link as noted above you will be taken to the Membership Add screen, in this screen, you will need to add the remaining member information including "Address" and "Date of Birth". (both are mandatory).

Date of birth is very important because it is used in edit checks and reports, so please have the correct date entered, but if you do not know the date you can key in 1/1/1900.

If the members address is unknown, click "Unknown" in the address area.

... I will add the new person below:

Prefix

*Last

*First

Middle

Suffix

Preferred First Name which member wishes to be called if different than First Name supplied above.

Normally, mail sent to the member will be addressed, first middle last; but, if the member wants mail to be addressed using a different first name, please supply the complete alternate name below along with last name.

Notes

*Date of Birth mm/dd/yyyy
Please do not guess, if unknown enter 1/1/1900.

Phone-Home Intl

Phone-Work Intl

Phone-Cell Intl

Email-Home

Email-Work

Spouse's Name

Spouse Birth Date

Children

Job Status

Employer

Job Title

Home/Primary Address

Below address failed Address Certification:
- You can correct and certify again - - Or leave alone and it will be used as is -

*Country Unknown

Type

*Address

*City

*State

*Zip

To USPS Certify click here

After the address has been entered click on "To USPS Certify, click here".

... I will add the new person below:

Prefix

*Last

*First

Middle

Suffix

Preferred First Name which member wishes to be called if different than First Name supplied above.

Normally, mail sent to the member will be addressed, first middle last; but, if the member wants mail to be addressed using a different first name, please supply the complete alternate name below along with last name.

Notes

*Date of Birth mm/dd/yyyy
Please do not guess, if unknown enter 1/1/1900.

Phone-Home Intl

Phone-Work Intl

Phone-Cell Intl

Email-Home

Email-Work

Spouse's Name

Spouse Birth Date

Children

Job Status

Employer

Job Title

Home/Primary Address

Address is Certified

*Country Unknown

Type

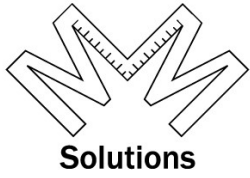
*Address

*City

*State

*Zip

To USPS Certify click here



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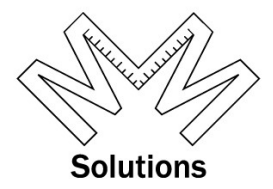
Once you have clicked “*Continue*” from the Membership Add screen your next step is to select the “*National*” body from the pull down, because this pull down is controlled by your permissions in many cases it will be defaulted based on these permissions.

The screenshot shows a web form for adding a membership. At the top, there are buttons for "Return to list of matches" and "Cancel". Below this is a yellow banner with the text: "You are adding a membership to the new person that you just added to the database." Underneath, it says "In the following body:" followed by three dropdown menus: "National", "State", and "Local". The "National" dropdown is open, showing a list of options: "-- select national body --", "-- select national body --", AMD-Grand Council, Blue Lodge, Cryptic Masonry, KM-Grand Council, Knights Templar, KTP - Grand College, Royal Arch Masonry, and SRICF-The High Council. A red circle highlights this dropdown menu. Below the dropdowns are "Continue" and "Cancel" buttons. At the bottom, there is a section for "Selected person:" with a yellow background. It shows the name "test, jim", address "1101 Business Pkwy S, Westminster, MD 21157-3066", and "Born unknown".

After you have selected the national body based on your permissions the state and local body will be defaulted. If you have state permissions you must select the “*Local*” body you want to add the membership to.

Because you are adding a member and his membership you will need to select “*Select Status*” on how you wish to append this membership to the new member record.

The screenshot shows the same web form as above, but now the "Status" dropdown is open. The "National" dropdown is set to "Knights Templar", "State" to "Alabama", and "Commandery" to "2 - Mobile". The "Status" dropdown is open, showing options: "-- Select Status --", "-- Select Status --", Petitioner/Candidate, Knighted - Orders Required, Affiliated, and Reinstated. A red circle highlights this dropdown menu. Below the dropdowns are "Continue" and "Cancel" buttons. At the bottom, there is a section for "Person:" with a yellow background. It shows the name "Test, Jim", address "1101 Business Pkwy S, Westminster, MD 21157-3066", and "Born unknown".



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Note: If you select a status listed below: (The examples below show Knights Templar, the verbiage will change based on the body)

“Petitioner/Candidate” - will allow you to add Petitioner & Candidate data as well as partial orders

“Knighted - Orders Required” –Petitioner and Candidate dates are not recorded or required but ALL ORDERS are.

“Affiliated”- used when a member is Affiliating with another local body or cannot be found on the database (this normally happens if a demit was issued prior to 2010 – if it was issued after 2010 please contact your Grand Recorder or System Administrator). Using Affiliated will require you to enter in the dates for Orders and where they were taken so make sure you have that information before proceeding.

“Reinstated”- used when a member is being Reinstated but is not currently a member of your local body (this normally happens if a suspension was issued prior to 2010 – if it was issued after 2010 please contact your Grand Recorder or System Administrator). Using Reinstated will require you to enter in the dates for Orders and where they were taken so make sure you have that information before proceeding.

After you have Selected Status and clicked on **“Continue”** the system will do a double check on the body you are appending (adding) this membership to, and if the system finds any members that are a potential match based on the last name it will list them and ask you to confirm that this member is not already in your local body.

You are adding a membership to the new person that you just added to the database.

In the following body:

National	Grand Commandery	Commandery	
Knights Templar ▼	Maryland ▼	1 - Maryland ▼	Petitioner/Candidate ▼

Use the Petitioner/Candidate selection when Petitioner and Candidate information are unavailable but ALL Orders information is available.

Caution - You are about to add new record to the system for:
 test, corrie [DOB] 01/01/1900
 But currently, in the database for this local body, are the following members that "look" like the member you are adding.
 Please verify you're not adding a duplicate.

Name	Born	Membership#	Status	Address
Test, Corrie	01/01/1900	1508718	Candidate	1101 Business Pkwy S, Westminster, MD 21157-3066

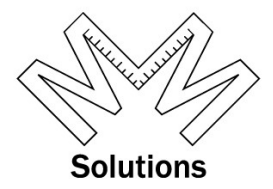
I have double checked and **none** of the above Commandery Members are **the same membership** I am adding.

I've reviewed the above. The new membership **does appear to already exist** in the Commandery. I **will not** add a membership at this time or I need to do further investigation.

Person:

test, corrie	1101 Business Pkwy S, Westminster, MD 21157-3066	Born unknown
--------------	--	--------------

If you find that this membership is already in the local body click **“Cancel”**. If you have done a double check and you want to continue to add this membership click **“Continue & Save record”**



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If you have selected **“Petitioner/Candidate”** status option you will be taken to the Add Membership/Orders screen to enter the dates. If you have all orders you may enter them all at one time, but it is required that you **MUST** enter **“Petitioner”** date and the **“First Line Signer”**.

Don't forget the system will do a double check on the body you are adding the member to, to see if it finds any members that could be a potential match based on the last name you supplied. (this is explained earlier in this document)

The pull down for **“First Line Signer”** may not have all members going back in history or if you do not know who signed it, you can select **“Unassigned”**

Note - the First Line Signer pull down table only contains members within the local body that the membership is being added to, it displays the names in three colors:

Black - Active members ---- Red - Deceased members ---- Gray - Inactive members

Example

System | Reports | Administrative | MJO Admin | Help | Membership - Add Membership/Orders

TEST, NICOLE [DOB] 01/01/1900 [Home] 210 Maple Ave, Hanover, PA 17331-5116

National Body: Knights Templar

Current Date of Birth: 7/1/2018 Change Date of Birth to: 1/1/1900 Current Date of Birth is unknown, please update - but if unknown leave 1/1/1900

Date	Grand Commandery	Commander	First Line Signer	Comments
Petitioner 7/1/2018	Pennsylvania	1 - Pittsburgh	Unassigned	
Candidate 7/1/2018	Pennsylvania	1 - Pittsburgh		

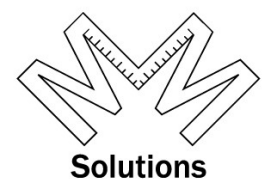
Note: If Petitioner Date is unknown enter 1/1/1900. DO NOT MAKE UP A DATE. Candidate Date must be greater than or equal to Petitioner Date.

Orders	Date	Grand Commandery	Commandery	Comments
Order of the Red Cross	Select a date			
Order of Malta				
Order of the Temple (Knighthood)				

Order of the Temple MUST contain a valid date and will be used as Knighthood date.

Knighthood	Date	Grand Commandery	Commandery	Comments
First Line Signer				

Save | Cancel | Reset



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Because you have selected **“Knighthed - Orders Required”** order status the Members Add Orders screen will appear. *Don’t forget the system will do a double check on the body you are adding the member to, to see if it finds any members that are potential matches based on the last name you supplied. (this is explained earlier in this document)*

The member status that you have selected prior to this screen appears bottom left. Because All Orders are required on this screen just fill in the order dates. The State and Local body information is defaulted from the previous screens based on your permissions. You will be required to enter the First Line Signer of the application.

The pull down for **“First Line Signer”** may not have all members going back in history or if you do not know who signed it, you can select **“Unassigned”**

Note - the First Line Signer pull down table only contains members within the local body that the membership is being added to, it displays the names in three colors:

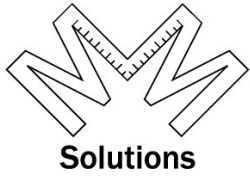
Black - Active members ---- Red - Deceased members ---- Gray - Inactive members

Note: If Petitioner Date is unknown enter 1/1/1900. DO NOT MAKE UP A DATE. Candidate Date must be greater than or equal to Petitioner Date.

Orders	Date	Grand Commandery	Commandery	Comments
Order of the Red Cross	Select a date			
Order of Malta				
Order of the Temple (Knighthed)				
Order of the Temple MUST contain a valid date and will be used as Knighthed date.				

Date	Grand Commandery	Commandery	Comments
Knighthed			
First Line Signer	Unassigned		

At any time prior to selecting **“Save”** you can click on **“Reset”** this will erase all your information entered but will keep you on this window, or if you select **“Cancel”** it will cancel out of everything you have done and back you out of this screen.



Masonic Membership Solutions User Guide

Once you have selected “Save” you will be taken to the Edit Status screen, which will confirm everything has been added as you have entered it.

System | Reports | Administrative | MJO Admin | Help | Membership - Change System | Memberships [1]

Sample, John [DOB] 01/01/1900 [Home] 1101 Business Pkwy S, Westminster, MD 21157-3066

National: Knights Templar

Member#	Grand Commandery	Commandery	Status	Status Date	Comment	Modified Date	Modified By
1508716	Maryland	17 - Carroll	Knighted	12/10/2020	Automatic Status upgrade, proper Order earned while at proper status.	1/5/2021	cgroth

Person: Sample, John: [17 - Carroll, Maryland, Knights Templar] [Membership# 1508716]

Date of Birth: 1/1/1900 *Current Date of Birth is unknown please update - but if unknown leave 1/1/1900*

Status: Knighted | Status Date: 12/10/2020 | First Line Signer: Unassigned

Status Date cannot be changed from this screen please click here to go to Orders screen.

If record is in Error and you need removed permanently with a Delete Adjustment - Contact System Administrator.

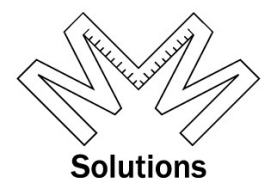
Comments: Automatic Status upgrade, proper Order earned while at proper status.

Reprint dues card? Yes No

Auto Comment: Auto Comment to be appended upon Save

If you selected “Affiliated” or “Reinstated” status, the Membership – Add Membership/Orders screen will appear. Remember at this point you are adding the member because you could not find him in the database as well as his dates of his orders/degrees and where they were taken. *Don't forget the system will do a double check on the body you are adding the member to, to see if it finds any members that are potential matches based on the last name you supplied. (this is explained earlier in this document)*

The member status that you have selected prior to this screen appears bottom left. Because this member was not originally found in the database and you have elected to add the member data as well as the membership you still must enter in the order dates and where they were taken. In this screen you have the ability to select the original state and body which may be out of your jurisdiction. (If you do not locate that body please contact the System Administrator before adding (“Cancel” out). Because all Orders are required on this screen and they are used in many different reports the dates and locations must be correct and are very important – DO NOT GUESS.



Masonic Membership Solutions User Guide

The bottom section State and Local body information is defaulted from the previous screens. You will be required to enter the date and also the First Line Signer of the application.

The pull down for **"First Line Signer"** may not have all members going back in history or if you do not know who signed it, you can select **"Unassigned"**. *It is noted that Reinstated does not require a first line signer – just select "Unassigned"*

Note - the First Line Signer pull down table only contains members within the local body that the membership is being added to, it displays the names in three colors:

Black - Active members ---- Red - Deceased members ---- Gray - Inactive members

National Body: Knights Templar

Current Date of Birth Listed: 01/01/1900 Change Date of Birth to: 1/1/1900 Current Date of Birth is unknown, please update - but if unknown leave 1/1/1900

Orders	Date	Grand Commandery	Commandery	Comments
Order of the Red Cross	Select a date	Alabama	2 - Mobile	
Order of Malta				
Order of the Temple (Knighthood)		Alabama	2 - Mobile	

No orders information for this person. All orders up to Order of the Temple must be earned before this person can be Affiliated.

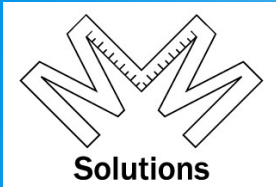
Date	Grand Commandery	Commandery	Comments
Affiliated	Alabama	4 - Montgomery	

First Line Signer: Select a member

Save Cancel Reset

At any time prior to selecting **"Save"** you can click on **"Reset"** this will erase all your information entered but will keep you on this window, or if you select **"Cancel"** it will cancel out of everything you have done and back you out of this screen.

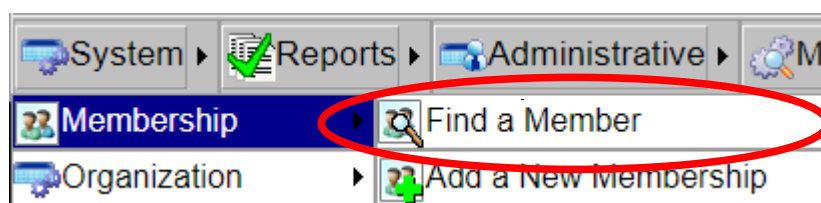
Once you have selected **"Save"** you will be taken to the Edit Status screen, which will confirm everything has been added as you have entered it.



Masonic Membership Solutions User Guide

Edit Status

If you want to edit an existing members status you first must search for the record by Name or Membership Number. To Find member first clear the screen by either clicking on the MMSolutions logo or pull down the **"System Functions"** menu and select Membership and the **"Find a Member"** sub menu.

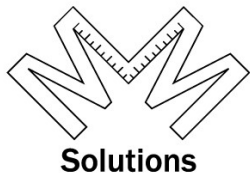


Begin by entering the members name or member number.

First	Last	Member#	National Body:	Filter by	Search By	Search	Return	Match
<input type="text"/>	<input type="text"/>	<input type="text"/>	KTP - Grand College	State of Residence	[Email] [Phone Number]	<input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Search Special"/>	<input checked="" type="radio"/> 100 <input type="radio"/> 500 <input type="radio"/> 1000 <input type="radio"/> All	<input checked="" type="radio"/> Wild <input type="radio"/> Exact
Found <input type="text"/>								

Tip in Search: Many times when you are doing a search a member is really on the database but spelled differently, this results in adding duplicates to our database. To prevent this many times you do not need to completely type out the members name. Example: Robert W. Armstrong - you can locate this by just "Ro" as first name and "Arms" as last name. This will bring you back a list of possible members, from the list just search through the list, if you get too many then increase your search by adding additional characters.

Also note "Filter by State of Residence" is provided but not normally needed and should only be used if you need to narrow down the search which normally this can be accomplished in the name fields.



Masonic Membership Solutions User Guide

After searching the database the system will return records matching what you have entered. The number of results will be displayed on the left. To display the entire list of results, click on the down arrow icon on the right hand side of this highlighted box.

System ► Reports ► Administrative ► MJO Admin ► Help ► **Person Maintenance - Profile**
System ► Membership ► Find a Member [Profile Edit]

First: robert, Last: smith, Member#: [], National Body: KTP - Grand College, National Number: [], Filter by: State of Residence, Search By: [Email], [Phone], [Number], Search: [Search], [Clear], [Search Special], Return: 100, 500, 1000, All, Match: Wild, Exact

Person	DOB	Home Address	City	State	Zip
Smith , Robert	01/01/1900	2496 S 600 E	Salt Lake City	UT	84106-1370

Found 99+ members. Above is the first member found. To see the other members, click the down arrow to the right of the yellow box.

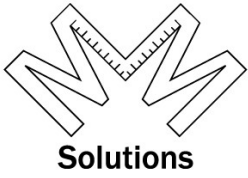
#0 People ID: 243559

The list of results will appear showing Member Name, Birth Date, and Address. Note: **Red records are deceased members.**

System ► Reports ► Administrative ► MJO Admin ► Help ► **Person Maintenance - Profile**
System ► Membership ► Find a Member [Profile Edit]

First: [], Last: Test, Member#: [], National Body: KTP - Grand College, National Number: [], Filter by: State of Residence

Person	DOB	Home Address	City	State	Zip
test, Corrie	1/1/1979	unknown	unknown	unknown	00000
Test, Corrie	1/1/1979	unknown	unknown	unknown	00000
Test, MaryAMD	12/15/1976	unknown	unknown	unknown	00000
Test, Robert Test 2	1/1/1900	unknown	unknown	unknown	00000
Test1st, MJV	1/1/1900	unknown	unknown	unknown	00000
testa, robert	1/1/1900	unknown	unknown	unknown	00000
Testa, Robert J.	9/13/1926	6216 Carr Rd -	Inyokern	CA	93527-2106
Testa, Robert Joseph	11/20/1962	4620 Blainfield Ct	Batavia	OH	45103-1182



Masonic Membership Solutions User Guide

Click on the member line in the results grid, this will automatically select the record and link all his data into the Member Profile screen. On the left side will be the base core functions which are linked to your permissions.

News System Reports Administrative MJO Admin Help

Person Maintenance - Profile
System Membership Find a Member [Profile Edit]

First: Last: Member#:

National Body: KTP - Grand College
National Number:

Filter by: State of Residence:

Search By: [Email] [Phone Number]
Search: Clear: Search Special:

Return: 100 500 1000
Match: Wild Exact

Found	Person	DOB	Home Address	City	State	Zip
1	Test, Corrie	01/01/1900	1101 Business Pkwy S	Westminster	MD	21157-3066

Your search found [1] member shown above. ## People ID: 261867

- Profile View
- Profile Edit**
- Address Edit
- Address View
- O.O.H.C.E.
- Orders/Degrees/Grades Edit
- Honors Edit
- Elite Category Edit
- Jewels Edit
- Receipt RePrint
- Mailing Options Edit
- Mailing Options View
- Signature Maint
- Blue Lodge Edit
- Blue Lodge View
- Other Orgs Edit
- Other Orgs View
- Memberships
- Full Financials

Save Cancel

Membership types used: **Regular**

Prefix:
*Last: Test
*First: Corrie
Middle:
Suffix:

*Date of Birth: 1/1/1900 mm dd yyyy
Birth Location:
Date of Death: mm dd yyyy
Edit Save Cancel

Phone-Home: Int:
Phone-Work: Int:
Phone-Cell: Int:

Email-Home: cgroth@mjodata.com
Email-Work:

Spouse's Name:
Spouse Birth Date:
 CT (Companion of the Temple)
 SA (Sweetheart Award)
 LC (Lady of the Council)

Children:

Job Status: Current
Employer:
Job Title:

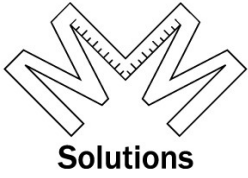
Notes:

[no signature on file]

Depending on what you are wanting to do you will have two options.

Example 1 - if you are changing a member's current status.

Example 2 - if the member has partial Orders/Degrees and not yet elevated to full membership and you wish to add more Orders/Degrees or he is currently at a Candidate status and you wish to add one or all of the Orders/Degrees.



Masonic Membership Solutions User Guide

EXAMPLE 1 - if you are changing a members current status.

Click on "Memberships"

- Profile View
- Profile Edit**
- Address Edit
- Address View
- O.O.H.C.E.
- Orders/Degrees/Grades Edit
- Honors Edit
- Elite Category Edit
- Jewels Edit
- Receipt RePrint
- Mailing Options Edit
- Mailing Options View
- Signature Maint
- Blue Lodge Edit
- Blue Lodge View
- Other Orgs Edit
- Other Orgs View
- Memberships**
- Full Financials

MemberBio

Save Cancel
Membership types used: **Regular**

Prefix

*Date of Birth mm dd/yyyy

Birth Location

*Last

*First

Middle

Suffix

Preferred First Name which member wishes to be called if different than First Name supplied above.

Normally, mail sent to the member will be addressed, first middle last; but, if the member wants mail to be addressed using a different first name, please supply the complete alternate name below along with last name.

Notes

Email-Home

Phone-Home

Email-Work

Phone-Work

Spouse's Name

Phone-Cell

Spouse Birth Date

CT (Companion of the Temple)

SA (Sweetheart Award)

LC (Lady of the Council)

Children

Job Status

Employer

Job Title

Clicking on "Memberships" brings you to the "Edit Status" screen.

System > Reports > Administrative > MJO Admin > Help > Membership - Change System > Memberships [1]

Sample, John [DOB] 01/01/1900 [Home] 1101 Business Pkwy S, Westminster, MD 21157-3066

National:

Member#	Grand Commandery	Commandery	Status	Status Date	Comment	Modified Date	Modified By
1508716	Maryland	17 - Carroll	Knighthood	12/10/2020	Automatic Status upgrade, proper Order earned while at proper status.	1/5/2021	cgroth

Person **Sample, John; [17 - Carroll, Maryland, Knights Templar] [Membership# 1508716]**

*Date of Birth mm dd/yyyy Current Date of Birth is unknown please update - but if unknown leave 1/1/1900

Status

Status Date cannot be changed from this screen please [click here](#) to go to Orders screen.

If record is in Error and you need removed permanently with a Delete Adjustment - Contact System Administrator.

Comments

Auto

Comment Auto Comment to be appended upon Save

Reprint dues card? Yes No

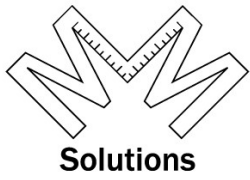
First Line Signer

On this screen besides changing a member's status, you are allowed to change the First Line Signer for the current status shown. If you need to change the status date please contact your system administrator who can help you.

MemberBio

At this point please note the different error messages. Please pay attention to these message as they will change based on members current status.

Also from this screen you can view the members current status history by clicking "History".



Masonic Membership Solutions User Guide

In the Status field pull down is the menu which gives you the different statuses that are available for the members current status. (example current status is *Knighted* so the two other available status will be *Demitted* or *Suspended*.)

System | Reports | Administrative | MJO Admin | Help | Membership - Chan System | Memberships |

Sample, John [DOB] 01/01/1900 [Home] 1101 Business Pkwy S, Westminster, MD 21157-3066

National: Knights Templar

Member#	Grand Commandery	Commandery	Status	Status Date	Comment	Modified Date	Modified By
1508716	Maryland	17 - Carroll	Knighted	12/10/2020	Automatic Status upgrade, proper Order earned while at proper status.	1/5/2021	cgroth

Profile | Person: Sample, John; [17 - Carroll, Maryland, Knights Templar] [Membership# 1508716]

Date of Birth: 1/1/1900 Current Date of Birth is unknown please update - but if unknown leave 1/1/1900

Status: **Knighted** (dropdown menu includes Knighted, Demitted, Suspended)

Status Date: 12/10/2020 Status Date cannot be changed from this screen please click here to go to Orders screen.

First Line Signer: Unassigned

Comments: Automatic Status upgrade, proper Order earned while at proper status.

Reprint dues card? Yes No

Auto Comment: Auto Comment to be appended upon Save

On this screen besides changing a member's status, you are allowed to change the First Line Signer for the current status shown. If you need to change the status date please contact your system administrator who can help you.

You will notice that if the members current status is "**Candidate**" you can select "**Enter Orders**" which will bring up the Order Degrees / Order Edit Screen for you to enter in the dates.

System | Reports | Administrative | MJO Admin | Help | Membership - Chan System | Memberships |

Sample, Corrie [DOB] 01/01/1900 [Home] 1101 Business Pkwy S, Westminster, MD 21157-3066

National: Knights Templar

Member#	Grand Commandery	Commandery	Status	Status Date	Comment	Modified Date	Modified By
1508717	Maryland	1 - Maryland	Candidate	12/27/2020		1/5/2021	cgroth

Profile | Person: Sample, Corrie; [1 - Maryland, Maryland, Knights Templar] [Membership# 1508717]

Date of Birth: 1/1/1900 Current Date of Birth is unknown please update - but if unknown leave 1/1/1900

Status: **Candidate** (dropdown menu includes Candidate, Candidate-Inactive, Enter Orders, DelAdj-InActive)

Status Date: 12/27/2020

First Line Signer: Unassigned

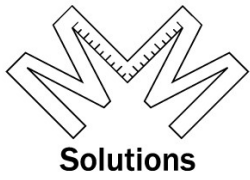
Comments: Men Temple (Knighted).

Reprint dues card? Yes No

Auto Comment: Auto Comment to be appended upon Save

If the Status date you are entering is unknown, please use a 1/1/1900 date – DO NOT make up a date But date must be equal to or greater than Petitioner date and less then or equal to when he took his Orders once they are added to file

On this screen besides changing a member's status, you are allowed to change the status date and the First Line Signer for the current status shown (edit errors will still apply on the date field). If you have errors during the change process because your dates are not being accepted by the system but they must be corrected, please contact your system administrator who can help you.



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In the Orders/Degree/Grades Edit screen by selecting "Add" you can add only one order or all Orders/ Degrees/ Grades at once, in this screen the National, State and Local bodies are all defaulted from previous screens.

System > Reports > Administrative > MJO Admin > Help > Person Maintenance - Orders/Degrees/Grades
System > Membership > Find a Member [Orders/Degrees]

First: Last: Member#: National Body: [KTP - Grand College] Filter by: State of Residence:
National Number:

Found	Person	DOB	Home Address	City	State	Zip
1	Test, Corrie	01/01/1900	1101 Business Pkwy S	Westminster	MD	21157-3066

Your search found [1] member shown above. #0 People ID: 248285

- Profile View
- Profile Edit
- Address Edit
- Address View
- O.O.H.C.E.
- Orders/Degrees/Grades Edit**
- Honors Edit
- Elite Category Edit
- Jewels Edit
- Receipt RePrint
- Mailing Options Edit
- Mailing Options View
- Signature Maint
- Blue Lodge Edit
- Blue Lodge View
- Other Orgs Edit
- Other Orgs View
- Memberships
- Full Financials

Orders: Test, Corrie

*National: [Knights Templar]

Date Order	State/Local	Comments
[Add]	[Order of the Red Cross]	[*Add All Orders]

Save Cancel

National: [Knights Templar] State: [Maryland] Local [Number]: [1 - Maryland]

If this member's orders were conferred from a location other than those locations which appear in the above lists, please contact your System Administrator for further assistance.

EXAMPLE 2 - if the member has partial Orders/Degrees/Grades and is not yet elevated to full membership and you wish to add more Orders/Degrees/Grades or is currently at a Candidate status and you wish to add one or all of the orders/degrees.

Because member has some of his Orders/Degrees/Grades selected or is currently at a Candidate status click on "Orders/Degrees /Grades Edit" which will bring up the Orders/Degrees/Grades screen.

System > Reports > Administrative > MJO Admin > Help > Person Maintenance - Orders/Degrees/Grade
System > Membership > Find a Member [Orders/Degree]

First: Last: Member#: National Body: [KTP - Grand College] Filter by: State of Residence:
National Number:

Found	Person	DOB	Home Address	City	State	Zip
1	Test, Corrie	01/01/1900	1101 Business Pkwy S	Westminster	MD	21157-3066

Your search found [1] member shown above. #0 People ID

- Profile View
- Profile Edit
- Address Edit
- Address View
- O.O.H.C.E.
- Orders/Degrees/Grades Edit**
- Honors Edit
- Elite Category Edit
- Jewels Edit
- Receipt RePrint
- Mailing Options Edit
- Mailing Options View
- Signature Maint
- Blue Lodge Edit
- Blue Lodge View
- Other Orgs Edit
- Other Orgs View

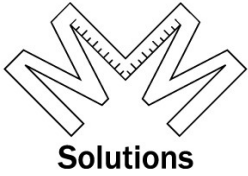
Orders: Test, Corrie

*National: [Knights Templar]

Date Order	State/Local	Comments
[Add]	[Order of the Red Cross]	
[Delete]		*Date Awarded: <input type="text"/>

Save Cancel

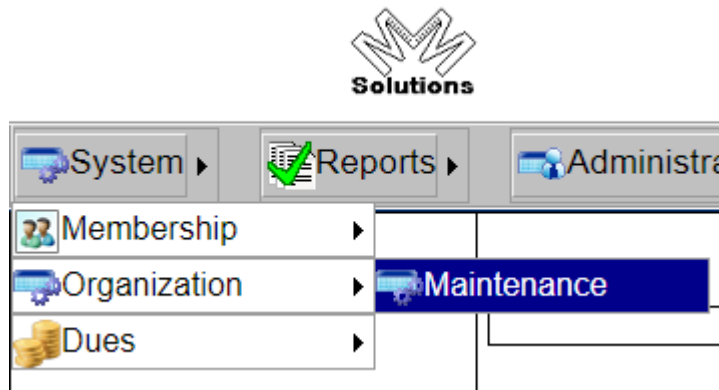
Please [click here](#) to return to the edit status screen.



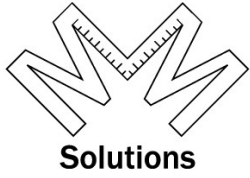
Masonic Membership Solutions User Guide

Organization Maintenance

Accessed by clicking on the *System* menu and choosing the *Organization* sub menu, and then selecting the *Maintenance* sub menu.



MMS			
National		Grand Encampment	
Knights Templar		*Grand Encampment: Knights Templar	
Grand Commandery		Grand Encampment Current Status	
-- focus above --		<input checked="" type="radio"/> Active <input type="radio"/> Inactive 6/21/1816	
Master Edit Addresses Edit Officers Edit Committees Edit Dues Profile Edit Fees Profile Edit Operational Settings Edit KTEF-Donations/Assessments Add Grand Commandery		Charter Date: 6/21/1816	
		History: Active effective 06/21/1816 - Charter: 06/21/18	
		Comment: <input type="text"/>	
		FedTDN: 23-7125380	
		Phone Number: 713-349-8700 <input type="checkbox"/> Intl	
		Fax Number: 713-349-8710 <input type="checkbox"/> Intl	
		Email: larry@gektusa.org	
		Conclave Start: 8/18/2018 mm/dd/yyyy	
		Conclave Ends: 8/22/2018 mm/dd/yyyy	
		Location: Indianapolis IN	



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Left-hand side navigation – Use the drop downs located on the left-hand side to select the “Body” you wish to view/edit.

NOTE: *These drop downs are populated based on user permissions. Therefore if you have rights to view/edit only 1 Commandery, the drop downs will NOT allow you to navigate to any other “body”.*


Core Functions (Left Hand Side Navigational Links)

- **Profile** – “Body” information such as Name, Number, Charter Date, Dues Cycle Date, Federal Tax ID #, etc
- *Screen will also display the current Recorder of the Commandery and will note if their signature image is on file to be used for annual Dues Cards*

Include signature on printed documents?
 If the current Recorder's signature is available (as shown in the box below), should this signature be affixed to MMS generated documents? (Example: Dues Cards)

Yes, include signature if available
 No, do not include signature

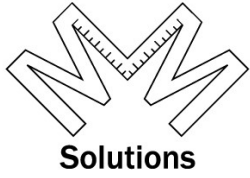
Current Recorder
 David Alfred Truax



Dues Information

This screen also accommodates a Department assignment for STATES only.

MMS	Grand Commandery
National	*Grand Commandery Illinois
Knights Templar	Grand Commandery Current Status
Grand Commandery	<input type="button" value="Edit"/> <input type="button" value="Save"/> <input type="radio"/> Active <input type="radio"/> Inactive 10/27/1857 <input type="button" value="Cancel"/> Charter Date 10/27/1857 History Prior [Active] effective 01/01/1900 - Charter: 01
Illinois	Comment FedTIN Phone Number 309-824-4720 <input type="checkbox"/> Int. Fax Number <input type="checkbox"/> Int. Email skeagle30@hotmail.com Conclave Start 7/30/2021 mmm/dd/yyyy Conclave Ends mmm/dd/yyyy Location Normal, Illinois <input type="button" value="Save"/> <input type="button" value="Cancel"/>
Commandery	Department East Central ** Select Department ** Add State to selected re East Central European & Africa Latin America & Caribbean Mid-Atlantic North Central Northeastern Northwestern South Central Southeastern Southwestern
-- focus above --	Note, this button does not save all data, just
Master View Master Edit Addresses Edit Addresses View Officers Edit Officers View Committees Edit Committees View Dues Profile Edit Dues Profile View Dues Dashboard Fees Profile Edit Fees Profile View Operational Settings Edit Operational Settings View KTEF-Donations/Assessments Clubs - Edit Legacy Entry Order Dues Cards RePrint Add Commandery	



Masonic Membership Solutions User Guide

Address

Official - Address where the Body meets. *This address is required.*

Shipping – Address where body would like all shipped items to be received if different from the Official address. *(This address is required for Annual Dues Card distribution)*

Dues Return Address – Address where body would like all Dues correspondence to be received if different than the Official address. *(This address is required if doing Annual Dues Cards)*

Mailing Address – Address where body would like all mailing correspondence to be received if different from the Official address. *This address is optional.*

The screenshot shows the MMS software interface. The top navigation bar includes System, Reports, Administrative, MJO Admin, and Help. The main content area is titled "Alabama, Knights Templar" and shows a table of addresses. The table has columns for Type, Postal Certified, Full Address, Updated, and By. The addresses listed are:

Type	Postal Certified	Full Address	Updated	By
C Official	✗	3430 Ratliff Rd Birmingham AL, 35210, USA	10/22/2020	jelkinton
C Dues Return				
C Fed Ex/UPS Shipping	✓	307 South Dr Fairhope AL, 36532-6311, USA	1/20/2021	mmartinez
C Mailing	✓	PO Box 100333 Birmingham AL, 35210-0333, USA	6/1/2020	cgroth

Below the table is an "Edit Address" form with fields for Country, Type, Address, City, State, and Code. The form also includes buttons for Edit Address, Remove, Mark as Returned, Certify, Save, Cancel, and Print Label.

If you need to edit an address make sure to click on Address Edit from left hand side navigation. Then simply click on the address you want to change and you will then be able to edit in the address area below.

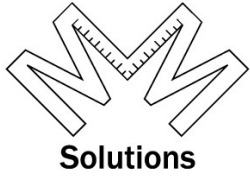
The screenshot shows the MMS software interface for "Illinois, Knights Templar". The table of addresses is as follows:

Type	Postal Certified	Full Address	Updated	By
C Official	✗	107 Sherman Street Delavan IL, 61734, USA	8/1/2014	rbigley1
C Dues Return				
C Fed Ex/UPS Shipping				
C Mailing	✓	PO Box 447 Delavan IL, 61734-0447, USA	8/1/2014	rbigley1

The "Edit Address" form below the table shows the following details:

- Country: USA
- Type: Official
- Address: 107 Sherman Street
- City: Delavan
- State: Illinois
- Zip: 61734

A red circle highlights the "Official" address in the table, and another red circle highlights the edit form. A blue box with white text reads: "Regardless if [C]ertified, [F]ailed, [O]verridden or [R]eturned, an OFFICIAL address is required and may not be blank."



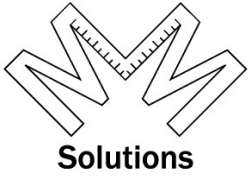
Masonic Membership Solutions User Guide

Officer – Screen where the user can update (view/edit) their offices (*Please refer to the Officer Module for more specific navigation of this screen*)

MMS	39 - Ascension, Missouri, Knights Templar		
National	Commandery Officers for: 39 - Ascension, Missouri, Knights Templar		
Knights Templar ▼	Show <input type="button" value="Current Officers"/> <input type="button" value="Active Past Officers"/> <input type="button" value="Inactive Past Officers"/>		<input type="button" value="Save All"/>
Grand Commandery	Switching tabs will cause all work to be verified and saved.		
Missouri ▼	* after title indicates only one office holder allowed at a time		
Commandery	Office Title Member Holding Office Start Date		
39 - Ascension ▼	Generalissimo* ▼	Paris Jr., Allan (Knighted) ▼	6/6/2017 ▼ <input type="button" value="Delete"/> <input type="button" value="View Member"/>
Master Edit	Captain General* ▼	Phillips, David R. (Knighted) ▼	6/6/2017 ▼ <input type="button" value="Delete"/> <input type="button" value="View Member"/>
Addresses Edit	Senior Warden* ▼	Sherman, William Joseph (Knighted) ▼	6/6/2017 ▼ <input type="button" value="Delete"/> <input type="button" value="View Member"/>
Officers Edit			
Fees Profile Edit			
Operational Settings Edit			
KTEF-Donations/Assessments			

Committees – Screen where the user can update (view/edit) committees (*Please refer to the Committee Module for more specific navigation of this screen*)

MMS	Knights Templar	
National	Committees maintenance	
Knights Templar ▼	Select a committee	Select a committee ▼
Grand Commandery	To add or manage members of a Committee you must first select the Committee in the pull down above.	
-- focus above -- ▼	IF YOU HAVE A COMMITTEE THAT IS NOT LISTED PLEASE CONTACT SYSTEM ADMIN.	
Master View		
Master Edit		
Addresses Edit		
Addresses View		
Officers Edit		
Officers View		
Committees Edit		
Committees View		
Dues Profile Edit		
Dues Profile View		



Masonic Membership Solutions User Guide

To add additional bodies Please contact your system administrator

System ▶ Reports ▶ Administrative ▶ Help ▶ Org Maintenance - Add
System ▶ Organization ▶ Maintenance [Add]

MMS Knights Templar

National Knights Templar

Knights Templar

Grand Commandery

-- focus above --

- Master Edit
- Addresses Edit
- Officers Edit
- Committees Edit
- Dues Profile Edit
- Fees Profile Edit
- Operational Settings Edit
- KTEF-Donations/Assessments
- Clubs - Edit

Add Grand Commandery

Add: Grand Commandery to Knights Templar

*Grand Commandery

Add: Grand Commandery to Knights Templar Current Status

Active Inactive

Charter Date

History

Comment

FedTIN

Phone Number Intl

Fax Number Intl

Email

Conclave Start mm/dd/yyyy

Conclave Ends mm/dd/yyyy

Location

Save

Cancel

Department **** Select Department ****

Dues Information

This state will use the system for annual dues cards

This state will use the system for dues cards on demand

This state will use the system for dues collection

Official Address

*Country USA Unknown

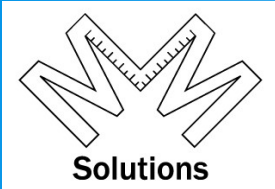
Type Official

*Address

*City

*State

*Zip



Masonic Membership Solutions User Guide

State and Local Officer Module

For the Officer Module we did not make modifications to the old module but we did a complete rewrite taking the input from many of our users who found the old module to be cumbersome, which we could not disagree with. The most important feature is you have all your officers displayed on one screen and broken up into three areas:

Current Officers – your current core of Officers

Active Past Officers – your Past Officers that are active within MMS (only contains officers with a title of Past or Emeritus as approved by Grand Encampment)

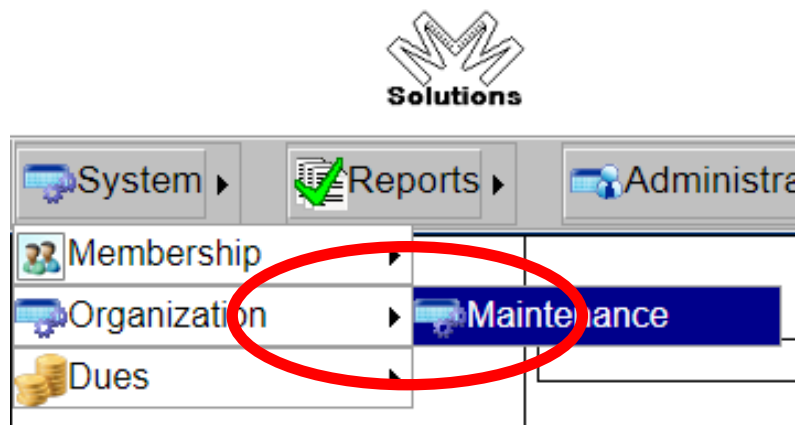
Inactive Past Officers – your Past Officers that are inactive within MMS (only contains officers with a title of Past or Emeritus as approved by Grand Encampment)

Within the Officer Module we have also removed the end date and are not tracking progression within the line – it is not important that John Smith was a Warder in 1970 and advanced to Junior Warden in 1971 but that John Smith is a Past Commander with Commander Term starting 6/1/1977.

Also along with the Officer Module we have also made changes to the reports for (Officer Roster / Organization Roster / Voting Delegates).

State Edit

1. Officers Edit by State
 - a. Go to System / Organization / Maintenance



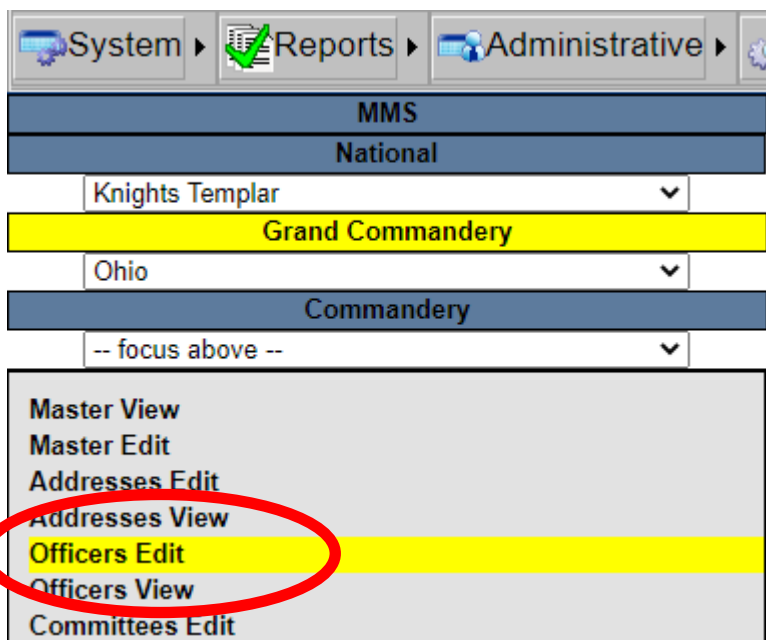


Masonic Membership Solutions User Guide

State Edit

- b. At this point no Local will be chosen since we are only working on the state level

Click on Officer-Edit on the left hand side of screen

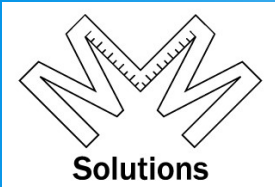


The new Officer Module is designed with (3) tabs at the top

1. Current Officers – your current core of Officers
2. Active Past Officers– your Past Officers that are active within MMS (only contains officers with a title of Past or Emeritus as approved by Grand Encampment)
3. Inactive Past Officers– your Past Officers that are inactive within MMS (only contains officers with a title of Past or Emeritus as approved by Grand Encampment)



Under the **Current Officers** tab (which is the default tab when the screen opens), the user is able to see, edit, and add all their current officer records.



Masonic Membership Solutions User Guide

To edit an office title, use the drop down to select a new one. **NOTE: The * after title indicates only one office holder allowed at a time!**

*** after title indicates only one office holder allowed at a time**

Office Title	Member Holding Office	Start Date		
Grand Commander*	Trent, Martin Robert (Knighted)	10/20/2018	Delete	View Member
Deputy Grand Commander*	Hager, Robert C. (Knighted)	10/20/2018	Delete	View Member
Grand Generalissimo*	Starr, Robert Thomas (Affiliated)	10/20/2018	Delete	View Member

Note: In the top section when you select from the member drop down list you will get only current or Past Officers of State – to add someone not in this drop down list, go to bottom of screen to the add section.

To edit a member who is holding a specific office title, use the drop down to select a new one.

*** after title indicates only one office holder allowed at a time**

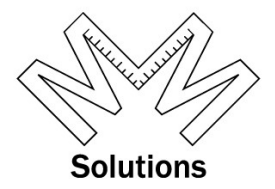
Office Title	Member Holding Office	Start Date		
Grand Commander*	Trent, Martin Robert (Knighted)	10/20/2018	Delete	View Member
Deputy Grand Commander*	Hager, Robert C. (Knighted)	10/20/2018	Delete	View Member
Grand Generalissimo*	Starr, Robert Thomas (Affiliated)	10/20/2018	Delete	View Member

To edit the Start Date for the member holding a specific office title, use the drop down and select a date.

NOTE: the date selected can NOT be more than 10 days in the future.

*** after title indicates only one office holder allowed at a time**

Office Title	Member Holding Office	Start Date		
Grand Commander*	Trent, Martin Robert (Knighted)	10/20/2018	Delete	View Member
Deputy Grand Commander*	Hager, Robert C. (Knighted)	10/20/2018	Delete	View Member
Grand Generalissimo*	Starr, Robert Thomas (Affiliated)	10/20/2018	Delete	View Member



Masonic Membership Solutions User Guide

You will see the **Red** error Message if any information is incorrect

*** after title indicates only one office holder allowed at a time**

Office Title	Member Holding Office	Start Date		
Grand Commander*	Koon II, William Howard (Knighthood)	Select Date	Delete	View Member
Deputy Grand Commander*	Hager, Robert C. (Knighthood)	10/20/2018	Delete	View Member

Must select a valid start date.

To delete a row all together, use the “Delete” button.

*** after title indicates only one office holder allowed at a time**

Office Title	Member Holding Office	Start Date		
Deputy Grand Commander*	Hager, Robert C. (Knighthood)	9/30/2018	Delete	View Member
Grand General		20/2018	Delete	View Member
Grand Captain		20/2018	Delete	View Member
Grand Senior W		20/2018	Delete	View Member
Grand Junior W		20/2018	Delete	View Member

Message from webpage

Are you sure you want to delete Deputy Grand Commander Hager, Robert C. (Knighthood)

Don't let this page create more messages

OK Cancel

When Deleting a member you will receive a message to re-confirm you want to delete the member. Click OK to Delete

Grand Commandery Officers for: Ohio, Knights Templar

Show

Officer Deleted

Switching tabs will cause all work to be verified and saved.

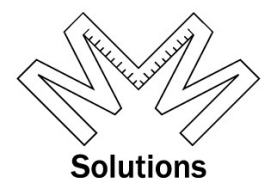
*** after title indicates only one office holder allowed at a time**

Office Title	Member Holding Office	Start Date		
Deputy Grand Commander*	Hager, Robert C. (Knighthood)	10/20/2018	Delete	View Member

Once all changes are made, click the “Save All” button at the top or bottom of the screen.

Show

Switching tabs will cause all work to be verified and saved.



Masonic Membership Solutions User Guide

If changes are all accurate you will see the “Officers Saved” message in Green

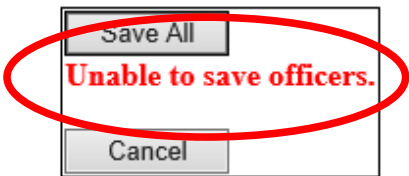
Show



Switching tabs will cause all work to be verified and saved.

If any changes are incorrect you will see the Red error message and “Unable to save officers” message in Red

Show



Switching tabs will cause all work to be verified and saved.

* after title indicates only one office holder allowed at a time

Office Title	Member Holding Office	Start Date
Deputy Grand Commander*	Hughes, Dennis Lee (Affiliated)	10/6/2019

*Future date not allowed. Can not select a date greater than 5/16/2019

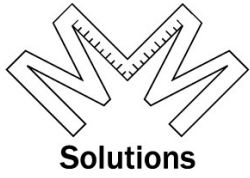
To add a new officer row to the list of officers, scroll down to the bottom of the screen and add the LOCAL Body first, the OFFICE Title, the member name, then start date. Then click the “Add” button.

Add a new member to a state-level office

Select Officer's Local Body:

Office Title: Select Member: Start Date:

Office Titles listed in blue will cause the selected member to replace the current office holder



Masonic Membership Solutions User Guide

NOTE: At this point the name in the “Select a Member” field will all be members of the Local Body you have selected.

*If a member’s name is printed in the drop down in **RED**, the member is deceased. If the member’s name is printed in the drop down in **GREY**, the member is alive but in an inactive status. If the member’s name is printed in the drop down in **BLACK**, the member is alive and in good standing.*

Save All Cancel

Add a new member to a state-level office

Select Officer's

Office Title:

Office Titles listed in blue will cause

Start Date:

office holder

- Select a member -
- Adams, Louis E. (Knighthood)
- Adams, Terrence William (Reinstated)
- Adkins, Robert P. (Deceased)
- Anderson, Gregory H. (Knighthood)
- Antell, James J. (Knighthood)
- Ashing, III, Charles W (Knighthood)
- Bailey, David Bruce (Candidate)
- Bake, William McKinley (Knighthood)
- Baloun, Bertram Anthony (Deceased)
- Barger, Larry Harold (Knighthood)

If you would like to go to the member’s record, click the View Member button. This feature is available on all 3 Tabs.

*** after title indicates only one office holder allowed at a time**

Office Title	Member Holding Office	Start Date	Delete	View Member
Grand Commander*	Trent, Martin Robert (Knighthood)	10/20/2018	Delete	View Member
Deputy Grand Commander*	Hager, Robert C. (Knighthood)	10/20/2018	Delete	View Member
Grand Generalissimo*	Starr, Robert Thomas (Affiliated)	10/20/2018	Delete	View Member

Before leaving this tab the system will remind you to save all changes made before continuing.

Grand Commander*

Generalissimo*

Captain General*

Senior War*

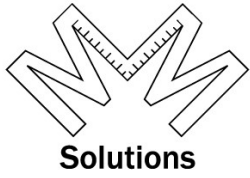
Junior War*

Relate*

Message from webpage

You will lose unsaved changes, are you sure?

OK Cancel



Masonic Membership Solutions User Guide

If the user clicks “OK”, the system will go directly to the member’s record under the O.O.H.C.E. screen and nothing you have done prior will be saved.

- Profile View
- Profile Edit
- Address Edit
- Address View
- O.O.H.C.E.**
- Orders/Degrees/Grades Edit
- Honors Edit
- Elite Category Edit
- Jewels Edit
- Receipt RePrint
- Mailing Options Edit
- Mailing Options View
- Signature Maint
- Blue Lodge Edit
- Blue Lodge View
- Other Orgs Edit
- Other Orgs View
- Memberships
- Full Financials

MemberBio

Orders/Degrees/Grades Earned					
Date	Order	National	Grand Commandery	Commandery	Comments
2/7/1990	Order of the Red Cross	Knights Templar	Ohio	78 - Logan	
2/7/1990	Order of Malta	Knights Templar	Ohio	78 - Logan	
2/14/1990	Order of the Temple (Knighthood)	Knights Templar	Ohio	78 - Logan	

Offices Held				
Office	Start	National	State	Local
Grand Commander	10/10/2020	Knights Templar	Ohio	
Aide de-Camp	10/10/2020	Knights Templar	Ohio	
Past Commander	06/16/1993	Knights Templar	Ohio	78 - Logan
Past Commander	06/08/2016	Knights Templar	Ohio	15 - Athens

Honors Received				
Date	Honor	National	State	Local
11/8/2011	Knight Commander of the Temple	Knights Templar	Ohio	78 - Logan
10/11/1996	Meritorious Service Award	Knights Templar	Ohio	78 - Logan

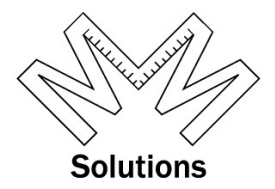
Committee Participation			
Committee	Committee Parent Organization	Start	Role

To get back to the Officer-Edit screen, simply click on any of the blue underlined Office Title under the “offices held” area.

Offices Held				
Office	Start	National	Grand Commandery	Commandery
Deputy Division Commander	10/07/2017	Knights Templar	Ohio	
Deputy Grand Commander	10/06/2018	Knights Templar	Ohio	
Junior Warden	06/19/2018	Knights Templar	Ohio	38 - Canton

You will now be back to Officers View Screen

Knights Templar	Office Title	Member Holding Office	Start Date
Grand Commandery	Grand Commander	Starr, Robert Thomas	10/10/2020
Ohio	Deputy Grand Commander	Edmiston III, George	10/10/2020
Commandery	Grand Generalissimo	Olson, Dale Allen	10/10/2020
-- focus above --	Grand Captain General	Ganion, Richard Lee	10/10/2020
Master View	Grand Senior Warden	Exline, Dale Alan	10/10/2020
Master Edit	Grand Junior Warden	Ensell, Ronald Lee	10/10/2020
Addresses Edit	Grand Prelate	Losasso, Donald Lee	10/10/2020
Addresses View	Grand Treasurer	Williams, Randy Allen	10/10/2020
Officers Edit	Grand Recorder	Johnson, Alfred Thomas	10/10/2020
Officers View	Grand Standard Bearer	Rentz, Larry Alan	10/10/2020
Committees Edit	Grand Sword Bearer	Leytze, David R	10/10/2020
Committees View			



Masonic Membership Solutions User Guide

Now lets review the Active Past Officers tab

Grand Commandery Officers for: Ohio, Knights Templar

Show

Switching tabs will cause all work to be verified and saved.

Under the Active Past Officers tab the user is able to see and edit their living Past Officers.

Grand Commandery Officers for: Ohio, Knights Templar

Show

Switching tabs will cause all work to be verified and saved.

[Sort By Office Rank](#) Sort By MemberName [A-Z](#) [Z-A](#) Sort By Date [Asc](#) [Desc](#)

*** after title indicates only one office holder allowed at a time**

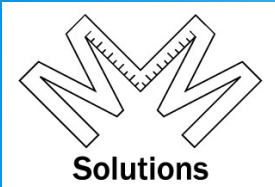
Office Title	Member Holding Office	Start Date	
Grand Prelate Emeritus	Forquer, Donald Richard	10/8/2016	Delete
Grand Prelate Emeritus	Gardner, Donald Bowers	10/9/2010	Delete
Grand Prelate Emeritus	Jackson, Edwin Earl	10/8/2011	Delete

The Active Past Officers & Inactive Past Officers tab can be sorted by Office rank, Member name or, Start date.

[Sort By Office Rank](#) Sort By MemberName [A-Z](#) [Z-A](#) Sort By Date [Asc](#) [Desc](#)

If you need to delete a row all together, use the “Delete” button.

Past Grand Commander	Boner, Franklin Cooper	10/11/2003	Delete	View Me
Past Grand Commander	Brady, Richard Jay	10/12/2013	Delete	View Me
Past Grand Commander	Clime, John Robert	10/8/2011	Delete	View Me



Masonic Membership Solutions User Guide

If you have made any changes, click the “Save All” button at the top or bottom of the screen.

Grand Commandery Officers for: Ohio, Knights Templar

Show

Switching tabs will cause all work to be verified and saved.

Sort By Office Rank Sort By MemberName [A-Z](#) [Z-A](#) Sort By Date [Asc](#) [Desc](#)

* after title indicates only one office holder allowed at a time

Office Title	Member Holding Office	Start Date		
Grand Prelate Emeritus	Forquer, Donald Richard	10/8/2016	<input type="button" value="Delete"/>	<input type="button" value="View Member"/>
Grand Prelate Emeritus	Gardner, Donald Bowers	10/9/2010	<input type="button" value="Delete"/>	<input type="button" value="View Member"/>
Grand Prelate Emeritus	Jackson, Edwin Earl	10/8/2011	<input type="button" value="Delete"/>	<input type="button" value="View Member"/>

To add a new out going Grand Commander to the list of Active Past Officers, scroll down to the bottom of the screen and add the LOCAL Body first, Then the OFFICE Title, the member name, then start date. Then click the “Add” button.

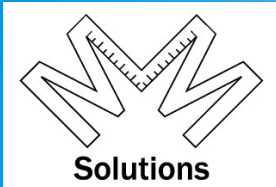
Add a new member to a state-level office

Select Officer's Local Body:

Office Title: Select Member: Start Date:

Office Titles listed in blue will cause the selected member to replace the current office holder

PLEASE NOTE: OUT GOING GRAND COMMANDERS MUST BE MADE A PAST GRAND COMMANDER..... THIS IS NOT DONE AUTOMATICALLY
You can also make him a PAST GRAND COMMANDER in the section above.



Masonic Membership Solutions User Guide

Now lets review the Inactive Past Officers tab

Grand Commandery Officers for: Ohio, Knights Templar

Show

Switching tabs will cause all work to be verified and saved.

Under the Inactive Past Officers tab the user is able to see and edit their deceased Past Officers and/or those past Officers that are in an inactive status condition. In addition, you have the ability to add a new officer to the list of officers shown. All options on this tab are the same as those for “Active Past Officers” tab

Grand Commandery Officers for: New York, Knights Templar

Show

Switching tabs will cause all work to be verified and saved.

[Sort By Office Rank](#) Sort By MemberName [A-Z](#) [Z-A](#) Sort By Date [Asc](#) [Desc](#)

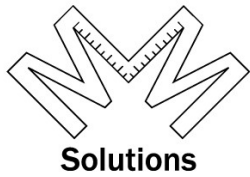
*** after title indicates only one office holder allowed at a time**

Office Title	Member Holding Office	Start Date	Delete	View Member
Grand Prelate Emeritus	Lang, Rev. Allen Charles	5/3/2010	<input type="button" value="Delete"/>	<input type="button" value="View Member"/>
Past Grand Commander	Beitter, Frederick A.	9/18/2016	<input type="button" value="Delete"/>	<input type="button" value="View Member"/>
Past Grand Commander	Cook, Robert Howard	9/21/1991	<input type="button" value="Delete"/>	<input type="button" value="View Member"/>
Past Grand Commander	Polla, Lawrence	9/17/1994	<input type="button" value="Delete"/>	<input type="button" value="View Member"/>
Past Grand Commander	Romaine, Warren Anthony	9/19/1992	<input type="button" value="Delete"/>	<input type="button" value="View Member"/>
Past Grand Commander	Wunsch Jr., Louis J.	9/15/2007	<input type="button" value="Delete"/>	<input type="button" value="View Member"/>

Add a new member to a state-level office

Select Officer's Local Body:

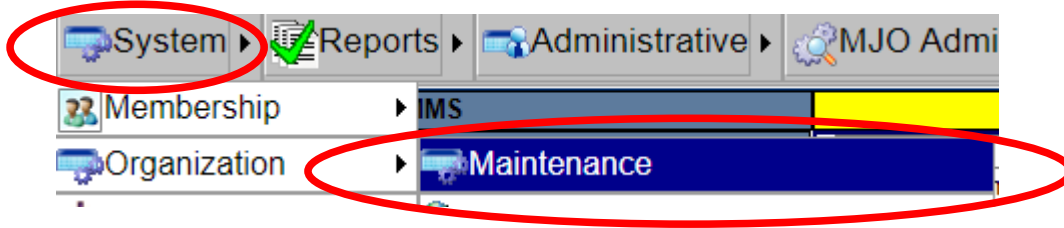
Office Title: Select Member: Start Date:



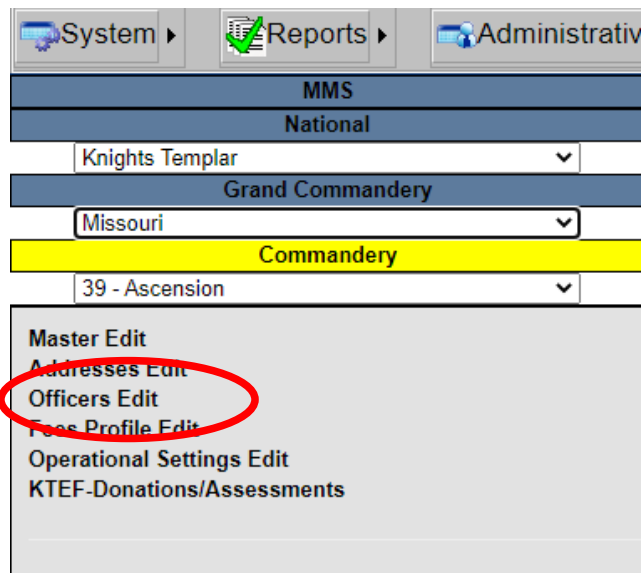
Masonic Membership Solutions User Guide

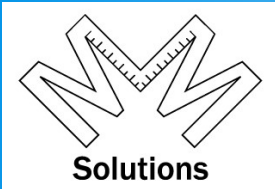
Officer Edit Local

1. Officers Edit Local
 - a. Go to System / Organization / Maintenance



- b. This is where you are going to want to chose a Local.
 1. Click on Officer-Edit on the left hand side of screen





Masonic Membership Solutions User Guide

The new Officer Module is designed with (3) tabs at the top

1. Current Officers – your current core of Officers
2. Active Past Officers– your Past Officers that are active within MMS (only contains officers with a title of Past or Emeritus as approved by Grand Encampment)
3. Inactive Past Officers– your Past Officers that are inactive within MMS (only contains officers with a title of Past or Emeritus as approved by Grand Encampment)

Grand Commandery Officers for: Ohio, Knights Templar

Show

Switching tabs will cause all work to be verified and saved.

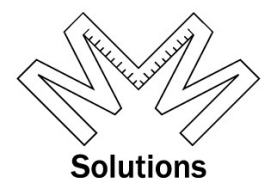
First we will Review the *Current Officers* tab.

Grand Commandery Officers for: Ohio, Knights Templar

Show

Switching tabs will cause all work to be verified and saved.

Under the *Current Officers* tab (which is the default tab when the screen opens), the user is able to see, edit, and add all their current officer records.



Masonic Membership Solutions User Guide

To edit an office title, use the drop down to select a new one. **NOTE: The * after title indicates only one office holder allowed at a time!**

Show

Switching tabs will cause all work to be verified and saved.

* after title indicates only one office holder allowed at a time

Office Title	Member Holding Office	Start Date		
Commander*	▼ Gilbert, James Keith (Knighted) ▼	6/6/2017 ▼	Delete	View Member
Generalissimo*	▼ McDaniel, David Paul (Knighted) ▼	6/6/2017 ▼	Delete	View Member
Captain General*	▼ Phillips, David R. (Knighted) ▼	6/6/2017 ▼	Delete	View Member

Note: In the top section when you select from the member drop down list you will get the full membership of the local body – to add someone not in this drop down list go to bottom of screen to the add section.

To edit a member who is holding a specific office title, use the drop down to select a new one.

Show

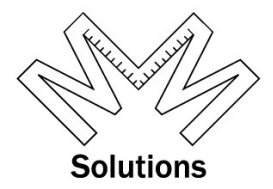
Switching tabs will cause all work to be verified and saved.

* after title indicates only one office holder allowed at a time

Office Title	Member Holding Office	Start Date		
Commander*	▼ Ferrier, Craig Eugene (Reinstated) ▼			
	▼ Ferrier, Ryan C. (Knighted) ▼			
	▼ Foster Jr., John Allen (Knighted) ▼			
	▼ Franklin Jr., Edward J. (Deceased) ▼			
	▼ Frazier, Jay Jansen (Knighted) ▼			
	▼ Frost, Marvin Walter (Affiliated) ▼			
	▼ Gates, Jesse B. (Suspended) ▼			
	▼ Gephardt, Robert P. (Knighted) ▼			
	▼ Gibbs, Donald Lewis (Deceased) ▼			
	▼ Gilbert, James Keith (Knighted) ▼	6/6/2017 ▼	Delete	View Member
	▼ Gilmore, Jr., Robert Blake (Knighted) ▼			

NOTE: At this point the name in the “Select a Member” field will all be members of the Local Body you have selected. If a member’s name is printed in the drop down in **RED**, the member is deceased. If the member’s name is printed in the drop down in **GREY**, the member is alive but in an inactive status. If the member’s name is printed in the drop down in **BLACK**, the member is alive and in good standing.

Note: Even though inactive members are shown, only current active members will show on the Current Officers tab.



Masonic Membership Solutions User Guide

To edit the Start Date for the member holding a specific office title, use the drop down and select a date.
NOTE: the date selected can NOT be more than 10 days in the future.

Show

Switching tabs will cause all work to be verified and saved.

*** after title indicates only one office holder allowed at a time**

Office Title	Member Holding Office	Start Date		
Commander*	Gilbert, James Keith (Knighted)	6/6/2017	Delete	View Member
Generalissimo*	McDaniel, David Paul (Knighted)	6/6/2017	Delete	View Member
Captain General*	Phillips, David R. (Knighted)	6/6/2017	Delete	View Member

You will see the **Red** error Message if any information is incorrect

*** after title indicates only one office holder allowed at a time**

Office Title	Member Holding Office	Start Date		
Commander*	Gilbert, James Keith (Knighted)	6/25/2020	Delete	View Member

***Future date not allowed. Can not select a date greater than 6/20/2019**

To delete a row all together, use the “Delete” button.

Show

Switching tabs will cause all work to be verified and saved.

*** after title indicates only one office holder allowed at a time**

Office Title	Member Holding Office	Start Date		
Commander*	Gilbert, James Keith (Knighted)	6/6/2017	Delete	View Member
Generalissimo*	McDaniel, David Paul (Knighted)	6/6/2017	Delete	View Member
Captain General*	Phillips, David R. (Knighted)	6/6/2017	Delete	View Member

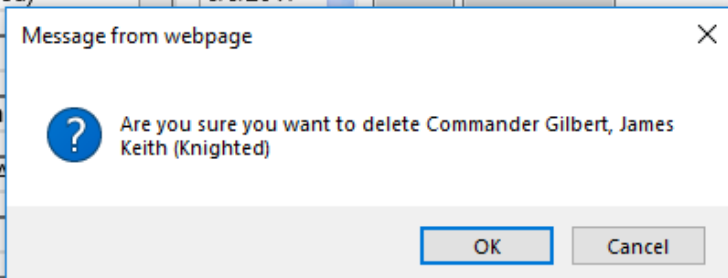


Masonic Membership Solutions User Guide

When Deleting a member you will receive a message to re-confirm you want to delete the member. Click OK to Delete

*** after title indicates only one office holder allowed at a time**

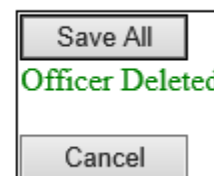
Office Title	Member Holding Office	Start Date		
Commander*	Gilbert, James Keith (Knighted)	6/6/2017	Delete	View Member
Generalissimo*	McDaniel, David Paul (Knighted)	6/6/2017	Delete	View Member
Captain General*	Phillips, David R. (Knighted)			
Senior Warden*	Sherman, William Joseph (Kn			
Junior Warden*	Cornilsen, Andrew Stephen (A			
Prelate*	Bedell, Gayle Don (Knighted)			
Treasurer*	Hardy, James D. (Knighted)	6/6/2017	Delete	View Member



Once you click OK you will see “Officer Deleted” in Green

Commandery Officers for: 39 - Ascension, Missouri, Knights Templar

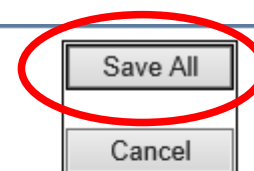
Show



Switching tabs will cause all work to be verified and saved.

Once all changes are made, click the “Save All” button at the top or bottom of the screen

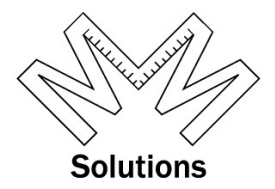
Show



Switching tabs will cause all work to be verified and saved.

*** after title indicates only one office holder allowed at a time**

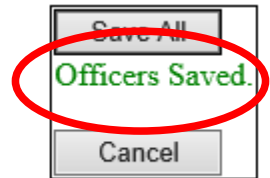
Office Title	Member Holding Office	Start Date		
Commander*	Gilbert, James Keith (Knighted)	6/6/2017	Delete	View Member
Generalissimo*	McDaniel, David Paul (Knighted)	6/6/2017	Delete	View Member
Captain General*	Phillips, David R. (Knighted)	6/6/2017	Delete	View Member



Masonic Membership Solutions User Guide

If changes are all accurate you will see the “Officers Saved” message in Green

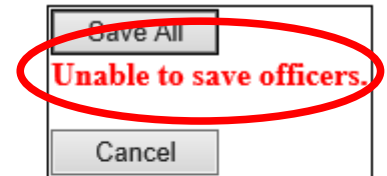
Show



Switching tabs will cause all work to be verified and saved.

If any changes are incorrect you will see the Red error message and “Unable to save officers” message in Red

Show



Switching tabs will cause all work to be verified and saved.

* after title indicates only one office holder allowed at a time

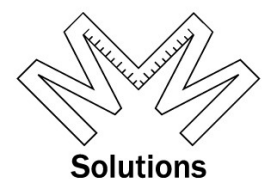
Office Title	Member Holding Office	Start Date
Generalissimo*	Paris Jr., Allan (Knighted)	6/1/2021

*Future date not allowed. Can not select a date greater than 6/20/2019

To add a new officer to the list of officers, scroll down to the bottom of the screen and add the OFFICE Title, the member name, then start date. Then click the “Add” button.

Add a new member to a local-level office

Office Titles listed in blue will cause the selected member to replace the current office holder



Masonic Membership Solutions User Guide

NOTE: At this point the name in the “Select a Member” field will all be members of the Local Body you have selected.

*If a member’s name is printed in the drop down in **RED**, the member is deceased. If the member’s name is printed in the drop down in **GREY**, the member is alive but in an inactive status. If the member’s name is printed in the drop down in **BLACK**, the member is alive and in good standing.*

Note: Even though inactive members are shown, only current active members will show on the Current Officers tab.

Add a new member to a local-level office

Office Titles listed in blue will cause a conflict with another office holder

Select a member

- Allen, Billy O. (Deceased)
- Ames, Jim L. (Suspended)
- Appleby, James W. (Demitted)
- Armfield Jr., Richard Beeson (Suspended)
- Austin, James B. (Demitted)
- Axley, Arthur H. (Demitted)
- Baker, Robert Earl (Deceased)
- Balay, Buford A. (Deceased)

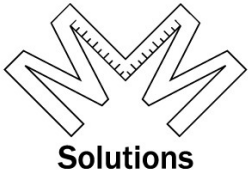
If you would like to go to the member’s record, click the View Member button. This feature is available on all 3 Tabs.

Show

Switching tabs will cause all work to be verified and saved.

* after title indicates only one office holder allowed at a time

Office Title	Member Holding Office	Start Date		
Commander*	Gilbert, James Keith (Knighted)	6/6/2017	Delete	View Member
Generalissimo*	McDaniel, David Paul (Knighted)	6/6/2017	Delete	View Member
Captain General*	Phillips, David R. (Knighted)	6/6/2017	Delete	View Member



Masonic Membership Solutions User Guide

Before leaving this tab the system will remind you to save all changes made before continuing.

* after title indicates only one office holder allowed at a time

Office Title	Member Holding Office	Start Date	
Generalissimo*	Paris Jr., Allan (Knighthood)	6/6/2017	Delete
Captain General*	Phillips, David P. (Knighthood)	6/6/2017	Delete
Senior Warden*	Sherman, William		
Junior Warden*	Cornilsen, Andrew		
Prelate*	Bedell, Gayle D		
Treasurer*	Hardy, James D		

Message from webpage

You will lose unsaved changes, are you sure?

OK Cancel

If the user clicks “OK”, the system will go directly to the member’s record under the O.O.H.C screen and nothing you have done prior will be saved.

Profile Edit
Address Edit
O.O.H.C.E.
Orders/Degrees/Grades Edit
Honors Edit
Elite Category Edit
Mailing Options Edit
Blue Lodge Edit
Other Orgs Edit
Memberships

National: Knights Templar

Orders/Degrees/Grades Earned

Date	Order	National	Grand Commandery	Commandery	Comments
4/7/1973	Order of the Red Cross	Knights Templar	Missouri	39 - Ascension	
4/7/1973	Order of Malta	Knights Templar	Missouri	39 - Ascension	
4/7/1973	Order of the Temple (Knighthood)	Knights Templar	Missouri	39 - Ascension	

Offices Held

Office	Start	National	Grand Commandery	Commandery
<u>Generalissimo</u>	06/06/2017	Knights Templar	Missouri	39 - Ascension

Honors Received
Committee Participation
Elite Categories

To get back to the Officer-Edit screen, simply click on any of the blue underlined Office Title under the “offices held” area.

Profile Edit
Address Edit
O.O.H.C.E.
Orders/Degrees/Grades Edit
Honors Edit
Elite Category Edit
Mailing Options Edit
Blue Lodge Edit
Other Orgs Edit
Memberships

National: Knights Templar

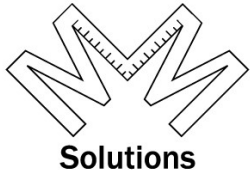
Orders/Degrees/Grades Earned

Date	Order	National	Grand Commandery	Commandery	Comments
4/7/1973	Order of the Red Cross	Knights Templar	Missouri	39 - Ascension	
4/7/1973	Order of Malta	Knights Templar	Missouri	39 - Ascension	
4/7/1973	Order of the Temple (Knighthood)	Knights Templar	Missouri	39 - Ascension	

Offices Held

Office	Start	National	Grand Commandery	Commandery
<u>Generalissimo</u>	06/06/2017	Knights Templar	Missouri	39 - Ascension

Honors Received
Committee Participation
Elite Categories



Masonic Membership Solutions User Guide

You will now be back to Officers Edit Screen

MMS **39 - Ascension, Missouri, Knights Templar**

National
Knights Templar

Grand Commandery
Missouri

Commandery
39 - Ascension

Master Edit
Address Edit
Officers Edit
Fees Profile Edit
Operational Settings Edit
KTEF-Donations/Assessments

Commandery Officers for: 39 - Ascension, Missouri, Knights Templar

Show

Switching tabs will cause all work to be verified and saved.

* after title indicates only one office holder allowed at a time

Office Title	Member Holding Office	Start Date		
Generalissimo*	Paris Jr., Allan (Knighted)	6/6/2017	Delete	View Member
Captain General*	Phillips, David R. (Knighted)	6/6/2017	Delete	View Member
Senior Warden*	Sherman, William Joseph (Knighted)	6/6/2017	Delete	View Member

Under the Active Past Officers tab the user is able to see and edit your living Past Officers.

Grand Commandery Officers for: Ohio, Knights Templar

Show

Switching tabs will cause all work to be verified and saved.

Sort By Office Rank Sort By MemberName [A-Z](#) [Z-A](#) Sort By Date [Asc](#) [Desc](#)

* after title indicates only one office holder allowed at a time

Office Title	Member Holding Office	Start Date		
Grand Prelate Emeritus	Forquer, Donald Richard	10/8/2016	Delete	View Member
Grand Prelate Emeritus	Gardner, Donald Bowers	10/9/2010	Delete	View Member
Grand Prelate Emeritus	Jackson, Edwin Earl	10/8/2011	Delete	View Member

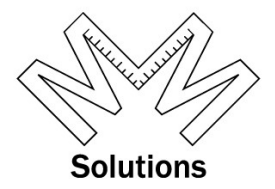
The Active Past Officers & Inactive Past Officers tab can be sorted by Office rank, Member name or, Start date.

Show

Switching tabs will cause all work to be verified and saved.

* after title indicates only one office holder allowed at a time

Office Title	Member Holding Office	Start Date		
Commander*	Parris, Dustin W. (Knighted)	1/1/2019	Delete	View Member



Masonic Membership Solutions User Guide

If you need to delete a row all together, use the “Delete” button

Grand Commandery Officers for: Ohio, Knights Templar

Show

Switching tabs will cause all work to be verified and saved.

[Sort By Office Rank](#) Sort By MemberName [A-Z](#) [Z-A](#) Sort By Date [Asc](#) [Desc](#)

*** after title indicates only one office holder allowed at a time**

Office Title	Member Holding Office	Start Date	Delete	View Member
Grand Prelate Emeritus	Forquer, Donald Richard	10/8/2016	Delete	View Member
Grand Prelate Emeritus	Gardner, Donald Bowers	10/9/2010	Delete	View Member
Grand Prelate Emeritus	Jackson, Edwin Earl	10/8/2011	Delete	View Member

If you have made any changes, click the “Save All” button at the top or bottom of the screen.

Grand Commandery Officers for: Ohio, Knights Templar

Show

Switching tabs will cause all work to be verified and saved.

[Sort By Office Rank](#) Sort By MemberName [A-Z](#) [Z-A](#) Sort By Date [Asc](#) [Desc](#)

*** after title indicates only one office holder allowed at a time**

Office Title	Member Holding Office	Start Date	Delete	View Member
Grand Prelate Emeritus	Forquer, Donald Richard	10/8/2016	Delete	View Member
Grand Prelate Emeritus	Gardner, Donald Bowers	10/9/2010	Delete	View Member
Grand Prelate Emeritus	Jackson, Edwin Earl	10/8/2011	Delete	View Member

To add a new out going Commander to the list of Active Past Officers, scroll down to the bottom of the screen and add the OFFICE Title, the member name, then start date. Then click the “Add” button.

[Add a new member to a state-level office](#)

Select Officer's Local Body:

Office Title: Select Member: Start Date:

Office Titles listed in blue will cause the selected member to replace the current office holder



Masonic Membership Solutions User Guide

PLEASE NOTE: OUT GOING COMMANDERS MUST BE MADE A PAST COMMANDER..... THIS IS NOT DONE AUTOMATICALLY
You can also make him a PAST COMMANDER in the section above.

Now lets review the Inactive Past Officers tab

Grand Commandery Officers for: Ohio, Knights Templar

Show

Switching tabs will cause all work to be verified and saved.

Under the Inactive Past Officers tab the user is able to see and edit their deceased Past Officers and/or those past Officers that are in an inactive status condition. In addition, you have the ability to add a new Inactive Past Officer to the list of officers shown. All options on this tab are the same as those for "Active Past Officers" tab

Show

Switching tabs will cause all work to be verified and saved.

[Sort By Office Rank](#) Sort By MemberName [A-Z](#) [Z-A](#) Sort By Date [Asc](#) [Desc](#)

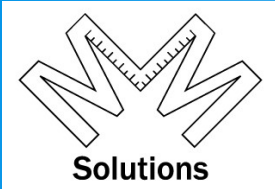
*** after title indicates only one office holder allowed at a time**

Office Title	Member Holding Office	Start Date		
Past Commander	Berryman Jr., Earl Lewis	1/1/1993	<input type="button" value="Delete"/>	<input type="button" value="View Member"/>
Past Commander	Gray, Richard E.	1/1/1969	<input type="button" value="Delete"/>	<input type="button" value="View Member"/>
Past Commander	Stoll, Raymond F.	1/1/2005	<input type="button" value="Delete"/>	<input type="button" value="View Member"/>

[Add a new member to a local-level office](#)

Select an office Select a member Select Date

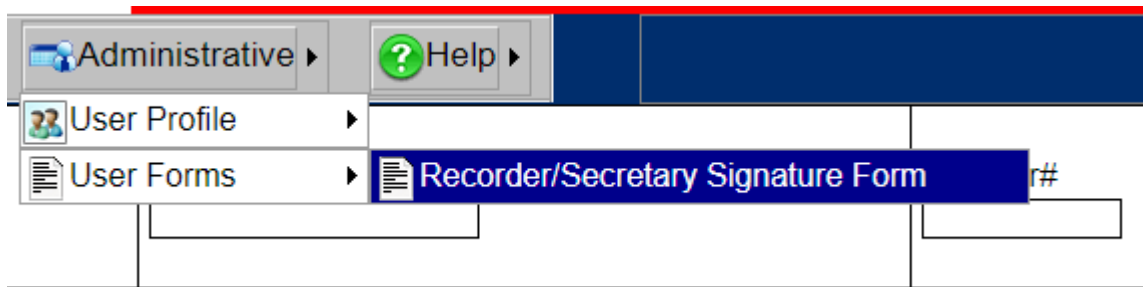
Office Titles listed in blue will cause the selected member to replace the current office holder



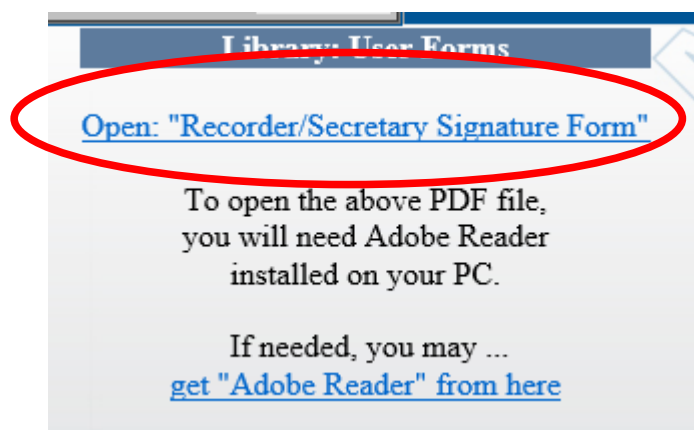
Masonic Membership Solutions User Guide

User Forms

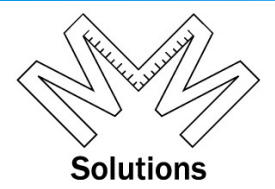
To access the Recorder Signature Upload form, click on *Administrative/User Forms/Recorder/Secretary Signature Form*



The form is stored in the database as a PDF document. To access it, click on the PDF name below



The form will open in PDF format and you will be able to print it using your Adobe print settings



Masonic Membership Solutions User Guide

NOTE: If a Recorder or Secretary signature has been uploaded into MMS, the signature image will appear in the Organizational Master-Edit core function screen.

Masonic Membership Solutions Signature Form

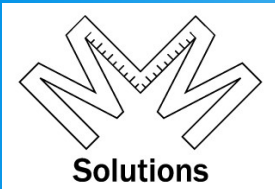
Instructions:

1. Please use BLACK ink only (NO felt tip pens) to sign your name in all 3 areas below.
2. To ensure your signature is a viable image, please use the entire area provided without marking outside of the designated boxed area.
3. Once this form is completed please scan this document and send to DuesCards@mjodata.com
4. Once we confirm we have the Correct Recorder/Secretary for your body we will add the signature to MMS.

Please Sign Below

NAME: (Please Print) _____

<p style="text-align: center;">Blue Lodge</p> <p>State: _____</p> <p>Lodge #: _____</p> <p>Lodge Name: _____</p> <p>Member #: _____</p>	<p style="text-align: center;">Council</p> <p>State: _____</p> <p>Council #: _____</p> <p>Council Name: _____</p> <p>Member #: _____</p>	<p style="text-align: center;">Chapter</p> <p>State: _____</p> <p>Chapter #: _____</p> <p>Chapter Name: _____</p> <p>Member #: _____</p>
<p style="text-align: center;">Commandery</p> <p>State: _____</p> <p>Commandery #: _____</p> <p>Commandery Name: _____</p> <p>Member #: _____</p>	<p style="text-align: center;">SRICF - The High Council</p> <p>College: _____</p> <p>_____</p> <p>Member #: _____</p>	

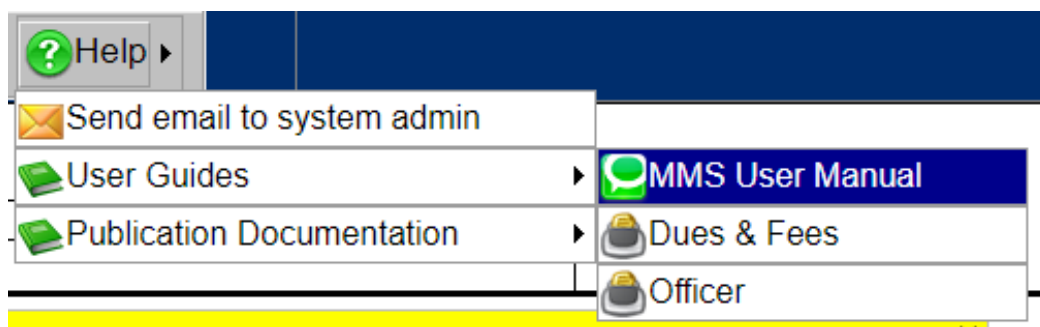


Masonic Membership Solutions User Guide

Help Menu

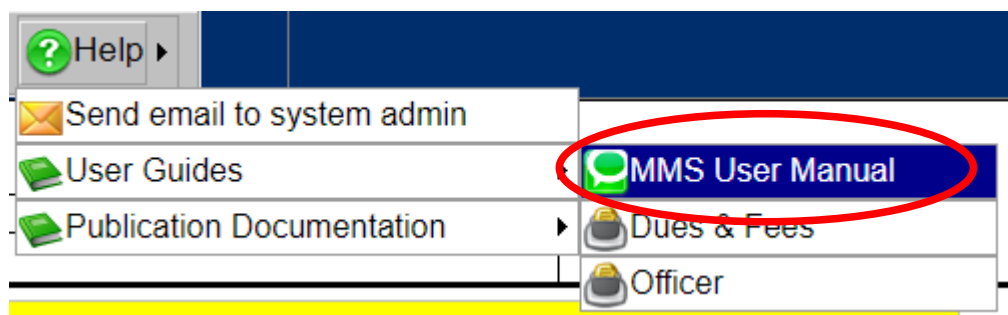
All users have the ability to access the MMS Quick Service Guides for all 3 modules if the database: *Membership, Donations, and Dues/Fees*.

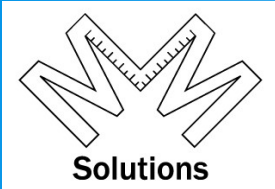
Go to *Help/User Guides* menu item



In addition all users have the ability to access documentation notes from the most recent publication and all previous ones dated since version 2.0.3 which was launched in January 2011.

For the most current release notes, go to *Help/ User Guides/ MMS User Manual* menu item.





Masonic Membership Solutions User Guide

Once you click on the menu item you will be directed the PDF link to open the User Manual.

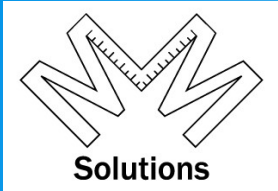
Documentation - Quick Start Guide

Help Guide

[Open: "MMSUserManual.pdf"](#)

To open the above PDF file,
you will need Adobe Reader
installed on your PC.

If needed, you may ...
[get "Adobe Reader" from here](#)



Masonic Membership Solutions User Guide

Once you Open the PDF you will be brought to the User Manual. You can either scroll down to go from page to page or you can search the manual by clicking on the top left of the page if you are looking for a specific area where you need specific help.

MMSUserManual.pdf | 1 / 67 | 100%

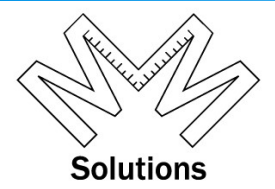
**Masonic Membership Solutions
User Guide**

Support for the MMS system is:

MMS: Masonic Membership Solutions

Chapters, Councils and Other Masonic Bodies
Phone : (214) 888-0220
Administrator: Robert Bigley & Marci Martinez
Email: manager@MMS1.us

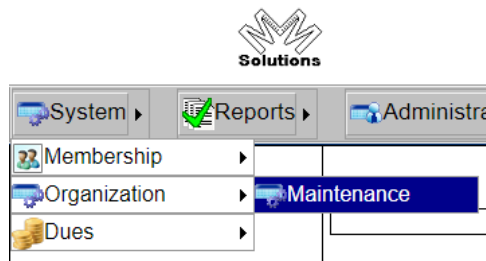
**Grand Encampment of Knights Templar
Commanderies**
Phone: (713) 349-8700
Administrator: John Elkinton
Email: john@gektusa.org



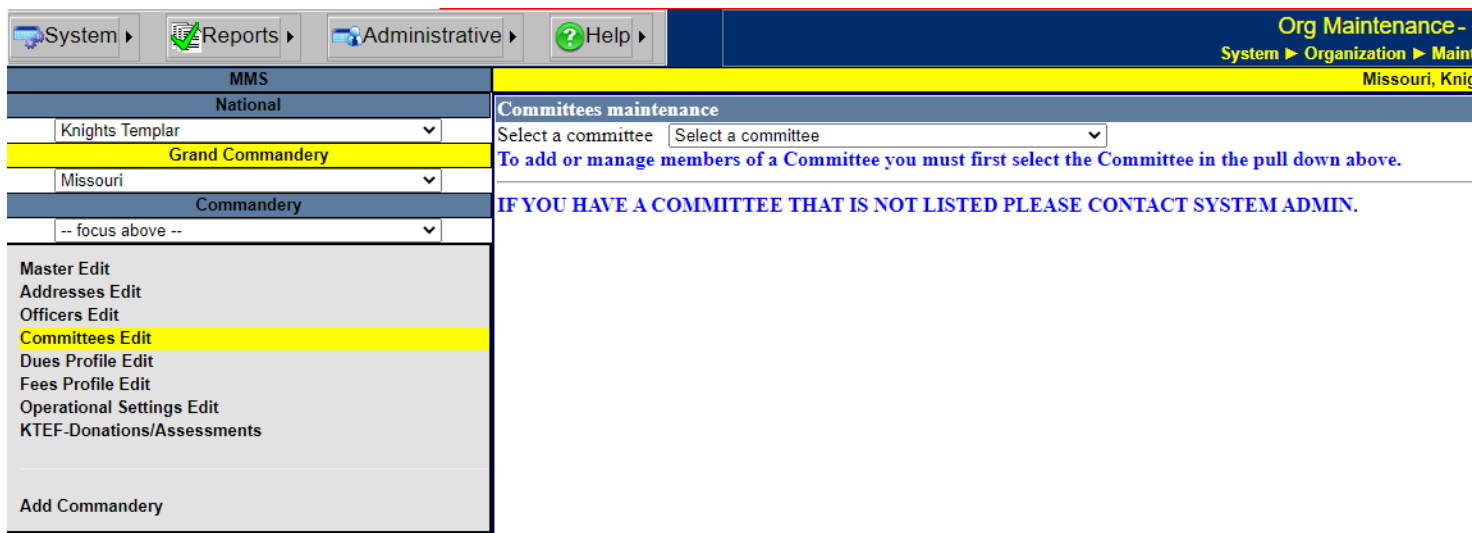
Masonic Membership Solutions User Guide

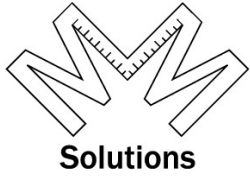
Committees

To access, click on the **System/Organization/Maintenance**



Select the appropriate **National, State and local** then Choose **Committee Edit** on left hand side of the screen

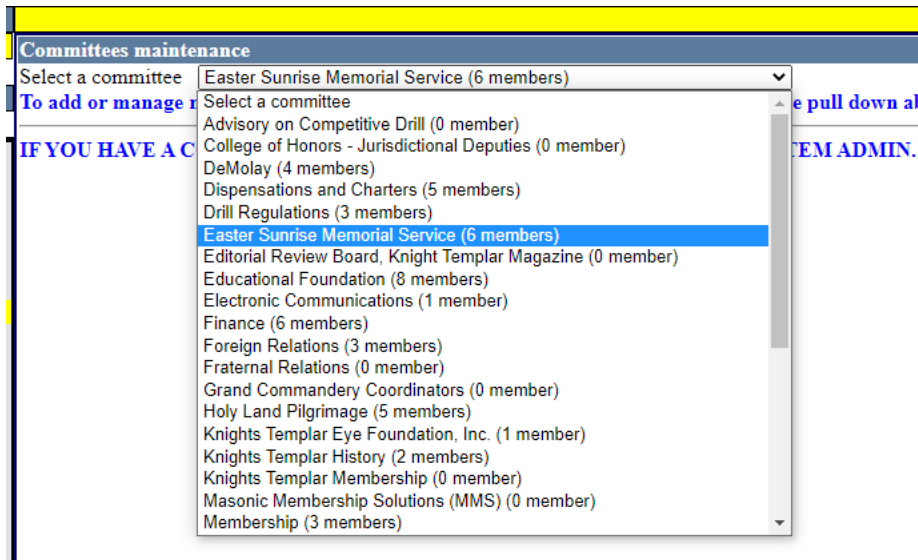




Masonic Membership Solutions User Guide

Once you have clicked on **Committee Edit** then use the dropdown to choose the committee you would like to assign.

****NOTE - If there is for Example (6 Members) next to the Committee name that indicates how many people are in the Committee and they will be shown on the bottom of the next screen******



Once you select a Committee you can assign members to the committee.

Illinois, Knights Templar

Committees maintenance

Select a committee

To add or manage members of a Committee you must first select the Committee in the pull down above.

IF YOU HAVE A COMMITTEE THAT IS NOT LISTED PLEASE CONTACT SYSTEM ADMIN.

By Laws Committee for Illinois, Knights Templar

Find Memberships meeting ALL of the below parameters

First Corrie	Last Groth	Member#	Filter by: State of Residence	<input type="button" value="Search"/>	<input type="button" value="Clear"/>
-----------------	---------------	---------	-------------------------------	---------------------------------------	--------------------------------------

Limit search to members in the following Commandery

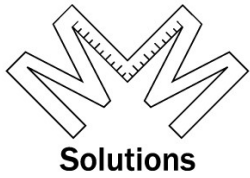
selected member(s) as

Roles with blue and an asterisk only allow a single member to hold it at any time.

Date: Comments:

Returned [1] of [1] found

Member Name	MMS#	Status	Body	Birth Date	Knighted Date	Add to Committee?
Grothusen, Victor L.	1299232	Knighted	18 - Rock Island	08/15/1931	01/06/1975	Deceased



Masonic Membership Solutions User Guide

When searching for a member type in their first and last name, or you can also search by member number.

Once you click Search there will be a list of potential matches or an exact match that will show up at the bottom.

Illinois, Knights Templar

Committees maintenance
 Select a committee
 To add or manage members of a Committee you must first select the Committee in the pull down above.

IF YOU HAVE A COMMITTEE THAT IS NOT LISTED PLEASE CONTACT SYSTEM ADMIN.
 By Laws Committee for Illinois, Knights Templar

Find Memberships meeting ALL of the below parameters

First Corrie	Last Groth	Member#	Filter by State of Residence	<input type="button" value="Search"/>	<input type="button" value="Clear"/>
-----------------	---------------	---------	------------------------------	---------------------------------------	--------------------------------------

Limit search to members in the following Commandery

selected member(s) as

 Roles with blue and an asterisk only allow a single member to hold it at any time.

Date: Comments:

Returned [1] of [1] found

Member Name	MMS#	Status	Body	Birth Date	Knighthood Date	Add to Committee?
Grothusen, Victor L.	1299232	Knighthood	18 - Rock Island	08/15/1931	01/06/1975	Deceased

When you choose the member you are looking for click on the check mark next to their name.

Committees maintenance
 Select a committee
 To add or manage members of a Committee you must first select the Committee in the pull down above.

IF YOU HAVE A COMMITTEE THAT IS NOT LISTED PLEASE CONTACT SYSTEM ADMIN.
 By Laws Committee for Illinois, Knights Templar

Find Memberships meeting ALL of the below parameters

First Robert	Last Test	Member#	Filter by State of Residence	<input type="button" value="Search"/>	<input type="button" value="Clear"/>
-----------------	--------------	---------	------------------------------	---------------------------------------	--------------------------------------

Limit search to members in the following Commandery

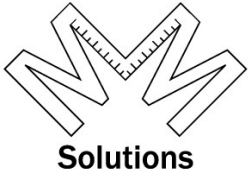
selected member(s) as

 Roles with blue and an asterisk only allow a single member to hold it at any time.

Date: Comments:

Returned [20] of [380] found, please narrow your search criteria if you don't find who you were seeking.

Member Name	MMS#	Status	Body	Birth Date	Knighthood Date	Add to Committee?
Alley, Robert Arnold	1299232	Affiliated	36 - Bethel	12/11/1936	11/11/1989	<input checked="" type="checkbox"/>
Anderson, Robert E.		Affiliated	35 - St Bernard	08/13/1919		<input type="checkbox"/>
Backer, Robert George		Knighthood	25 - Calvary	07/30/1947	04/03/2010	<input type="checkbox"/>
Bakker, Robert		Affiliated	36 - Bethel	08/08/1983	11/15/2014	<input type="checkbox"/>
Banning, Robert E.		Affiliated	37 - Melita	08/07/1933		<input type="checkbox"/>
Barber, Robert E.		Knighthood	2 - Tancred	07/18/1935	08/10/2013	<input type="checkbox"/>
Beaty, Robert Cress		Knighthood	8 - Galesburg	07/15/1948	01/20/2007	<input type="checkbox"/>



Masonic Membership Solutions User Guide

If you click add it will tell you that you need to select the role as well as the option to choose the Commandery

Find Memberships meeting ALL of the below parameters

First Robert	Last Test	Member#	Filter by State of Residence	Search	Clear
-----------------	--------------	---------	------------------------------	--------	-------

Limit search to members in the following Commandery
All Illinois Commanderies

Add selected member(s) as
Select a role
Select a role
Chairman*
Co-Chairman
Assistant Chairman*
Vice Chairman*
Treasurer*
Secretary*
Member
Editor

Date: [] Comments: []

Returned [20] of [380] found, please narrow your search. If you don't find who you were seeking.

Member Name	MMS#	Status	Body	Birth Date	Knighthood Date	Add to Committee?
-------------	------	--------	------	------------	-----------------	-------------------

When Selecting your role Please note - Roles with blue and an asterisk only allow a single member to hold it at any time

Add selected member(s) as
Select a role
Select a role
Chairman*
Co-Chairman
Chairman Emeritus*
Assistant Chairman*
Vice Chairman*
Treasurer*
Secretary*
Member
ex-officio

Once all the information has been filled in click Add

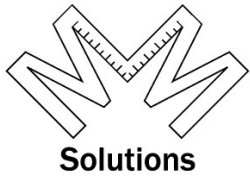
Find Memberships meeting ALL of the below parameters

First LILY	Last Groth	Member#	Filter by State of Residence	Search	Clear
---------------	---------------	---------	------------------------------	--------	-------

Limit search to members in the following Commandery
2 - Mobile

Add selected member(s) as
Co-Chairman

Date: 11/17/2020 Comments: Documentation Example



Masonic Membership Solutions User Guide

Honors Edit

When adding Honors to a members record you must first pull up the member. Once you have the members record up you will then look on the left hand side of the screen to see the different Core Functions you can choose from. To Add, Edit or even Delete an Honor you will choose the Honors Edit Function.

Found 1 member shown above.

Person	DOB	Home Address	City	State	Zip
Test, Corrie	06/12/1979	1101 Business Pkwy S	Westminster	MD	21157-3066

- Profile Edit
- Address Edit
- A.O.H.C.E.
- Orders/Degrees/Grades Edit
- Honors Edit**
- Elite Category Edit
- Mailing Options Edit
- Blue Lodge Edit
- Other Orgs Edit
- Memberships

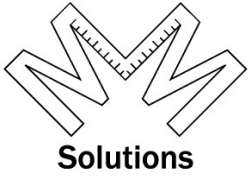
Honors: Test, Corrie

National: Knights Templar

Select to edit/delete	Date	Honor	National	State	Local
<input type="button" value="Edit"/>	<input type="text" value="Date Awarded"/>	<input type="text" value="Honor"/>	<input type="text" value="National"/>	<input type="text" value="State"/>	<input type="text" value="Local"/>

Once you click on Honors Edit you can then choose the national body you would like to add Honors to. Depending on your Permissions will depend on what national bodies you can add Honors to.

Select to edit/delete	Date	Honor	National	State	Commandery
<input type="button" value="Select"/>	4/1/2021	General Grand Chapter Ep...	Knights Templar		
<input type="button" value="Select"/>	10/4/2011	Knight Commander of the T...	Knights Templar	Illinois	36 - Bethel
<input type="button" value="Select"/>	8/10/2015	Knight Grand Cross of the Temple	Knights Templar	Illinois	36 - Bethel



Masonic Membership Solutions User Guide

Each National body has its own Honors to choose from as well as each state and local. When adding an Honor Click on the Add button

Honors: Test, Corrie

National

Select to edit/delete	Date	Honor	National	State	Commandery
<input type="button" value="Select"/>	7/5/2021	Honor Commandery Award	Knights Templar	Missouri	3 - DeMolay

Date Awarded:
mm/dd/yyyy

*Honor:

Awarded By: _____

Once you click add you will be able to choose the Honor from the drop down.

Honors: Test, Corrie

National

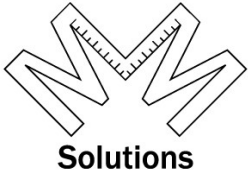
Select to edit/delete	Date	Honor	National	State	Commandery
<input type="button" value="Select"/>	7/5/2021	Honor Commandery Award	Knights Templar	Missouri	3 - DeMolay

Date Awarded:
mm/dd/yyyy

*Honor:

- Select an Honor
- Meritorious Service Award
- Grand Commanders Service Award
- Lewis and Clark Award
- Order of the White Star
- Honor Commandery Award
- Knight of Siloam

Awarded By: _____



Masonic Membership Solutions User Guide

After the Honor has been selected you will see the State and Local noted where member belongs, select the correct body to assign where the Honor was earned. Sometimes there maybe more then one state or local to choose from.

Honors: Test, Corrie

National: **Knights Templar**

Select to edit/delete	Date	Honor	National	State	Local
<input type="button" value="Edit"/> <input type="button" value="Add"/> <input type="button" value="Delete"/>	<input type="text" value="7/5/2021"/>	<input type="text" value="Honor Commandery Award"/>	<input type="text" value="Knights Templar"/>	<input type="text" value="Missouri"/>	<input type="text" value="3 - DeMolay"/>

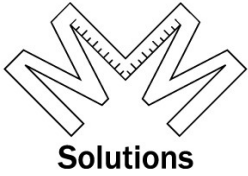
Once all the correct information has been selected click save. The Honor will then show above with the date earned, and the location.

Honors: Test, Corrie

National: **Knights Templar**

Select to edit/delete	Date	Honor	National	State	Commandery
<input type="button" value="Select"/>	<input type="text" value="7/5/2021"/>	<input type="text" value="Honor Commandery Award"/>	<input type="text" value="Knights Templar"/>	<input type="text" value="Missouri"/>	<input type="text" value="3 - DeMolay"/>

Awarded By: **Riss, York**



Masonic Membership Solutions User Guide

If for some reason you need to delete an Honor you will want to click on the **Select** button next to the honor. Once you click select you can also Edit anything you may need to at that time or delete the honor.

Honors: Test, Corrie

National: Knights Templar ▼

Select to edit/delete	Date	Honor	National	State	Commandery
Select	7/5/2021	Honor Commandery Award	Knights Templar	Missouri	3 - DeMolay

Edit **Add**
Delete
Save
Cancel

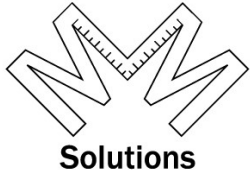
Date Awarded: 7/5/2021 ▼
mm/dd/yyyy

*Honor: Honor Commandery Award ▼

State	Local
Missouri ▼	3 - DeMolay ▼

Awarded By: Riss, York

If there is an honor not in the dropdown that should be there, please contact your system administrator.

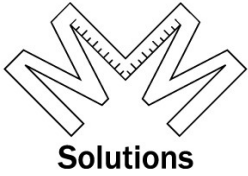


Masonic Membership Solutions User Guide

Elite Category Edit

When adding an Elite Category to a members record you must first pull up the member. Once you have the members record up you will then look on the left hand side of the screen to see the different Core Functions you can choose from. To Add, Edit or even Delete an Elite Category you will choose the Elite Category Edit.

Once you click on Elite Category Edit you can then choose the national body you would like to add an Elite Category to. Depending on your Permissions will depend on what national bodies you can add to.



Masonic Membership Solutions User Guide

Each National body has its own Elite Categories to choose from as well as each state and local. When adding an Elite Category Click on the Add button

Elite Category is used to track Life Members - Perpetual Members - Prepaid Members - Endowed Members and different levels of members (e.g. 50 Year Member).

National:

Select to edit/delete	Date	Elite Category	National	State	Commandery	Category#
<input type="button" value="Select"/>	1/25/2010	25 Year Member	Knights Templar	Missouri	67 - Poplar Bluff	
<input type="button" value="Select"/>	1/25/2010	25 Year Member	Knights Templar	Missouri	12 - St Graal	
<input type="button" value="Select"/>	12/31/2006	Endowed Member	Knights Templar	Missouri	12 - St Graal	117
<input type="button" value="Select"/>	12/31/2006	Endowed Member	Knights Templar	Missouri	67 - Poplar Bluff	118

Date Assigned:

*Elite Category:

Category#:

Number is optional and only used if you are tracking within your own jurisdiction.

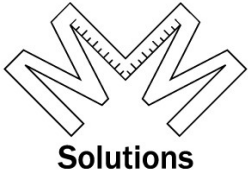
Assigned By:

Once you click add you will be able to choose the Elite Category from the drop down.

Date Assigned:

*Elite Category:

- Select an Elite Category
- 25 Year Member
- 40 Year Member
- 50 Year Member
- Endowed Member
- Life Member - Local Program
- Life Member-State Program
- Perpetual Member



Masonic Membership Solutions User Guide

After the Elite Category has been selected you will see the State and Local noted where member belongs, select the correct body to assign where Elite Category was earned. Sometimes there maybe more than one state or local to choose from.

Elite Category: Test, Corrie

Elite Category is used to track Life Members - Perpetual Members - Prepaid Members - Endowed Members - levels of members (e.g. 50 Year Member).

National:

Select to edit/delete	Date	Elite Category	National	State	Local	Category#
<input type="button" value="Edit"/> <input type="button" value="Add"/> <input type="button" value="Delete"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>	Date Assigned: 8/24/2021	*Elite Category: 25 Year Member		State: Missouri	Local: 3 - DeMolay	Category#:

Number is optional and only used if you are tracking within your own jurisdiction.

Assigned By: _____

Once all the correct information has been selected click save. The Elite Category will then show above with the date earned, and the location.

Elite Category: Test, Corrie

Elite Category is used to track Life Members - Perpetual Members - Prepaid Members - Endowed Members - levels of members (e.g. 50 Year Member).

National:

Select to edit/delete	Date	Elite Category	National	State	Commandery	Category#
<input type="button" value="Select"/>	8/24/2021	25 Year Member	Knights Templar	Missouri	3 - DeMolay	

Number is optional and only used if you are tracking within your own jurisdiction.

Assigned By: _____



Masonic Membership Solutions User Guide

If for some reason you need to delete an Elite Category you will want to click on the **Select** button next to the Elite Category. Once you click select you can also Edit anything you may need to at that time or delete the Elite Category.

Elite Category is used to track Life Members - Perpetual Members - Prepaid Members - Endowed Members and different levels of members (e.g. 50 Year Member).

National

Select to edit/delete	Date	Elite Category	National	State	Commandery	Category#
<input type="button" value="Select"/>	8/24/2021	25 Year Member	Knights Templar	Missouri	3 - DeMolay	

Date Assigned:
mm/dd/yyyy

*Elite Category:

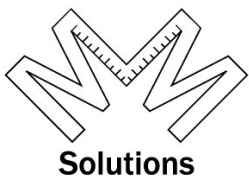
State	Local
Missouri <input type="button" value="v"/>	3 - DeMolay <input type="button" value="v"/>

Category#:

Number is optional and only used if you are tracking within your own jurisdiction.

Assigned By:

If there is an elite category not in the dropdown that should be there, please contact your system administrator.



Masonic Membership Solutions User Guide

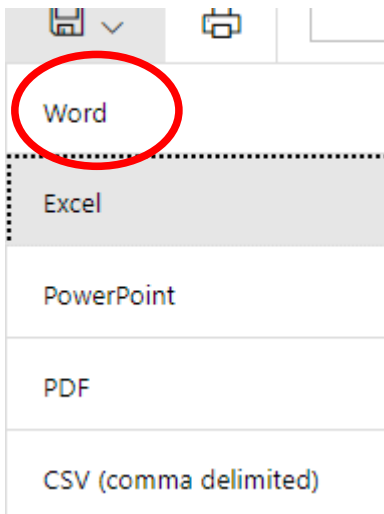
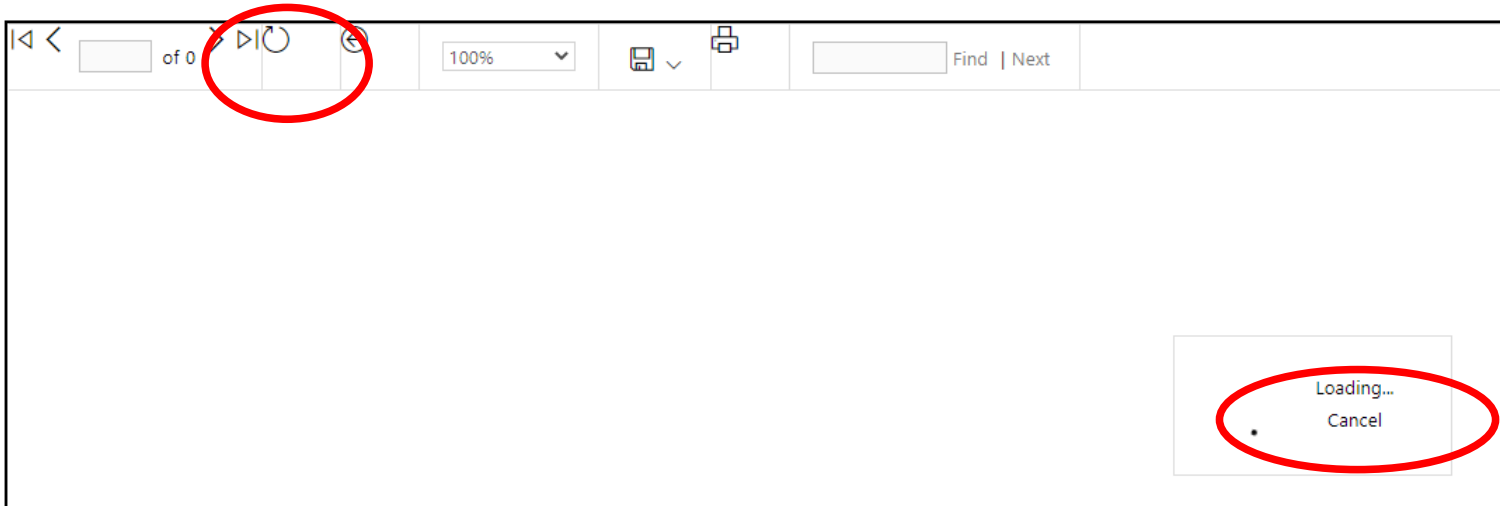
Report Printing

Anytime you run a report, there will always be a header that shows different things you can do with a report.

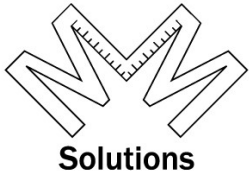


This area will allow you to move to a different page

This is your refresh button. If running a report and you need to cancel, you can click the **"Cancel"** while loading then change your parameters.



The save button will give you different options you can use to save a report.



Masonic Membership Solutions User Guide

When Clicking on the Print Icon this will show a Pop-up for Paper size and Orientation... Once you click Print, the report will convert to a PDF and then you can print out the report.

User Access Report Parameters Used: Ohio, Knights Templar Groups: All Active Users Only Activity Period: 1/21/2021 to 1/21/2021

User's Last, First	User Name	E-mail Address	Active	Status Changed	Changed By
Knights Templar					
Ohio				0 changes	154 unique users
GRAND COMMANDERY					
* ADAMS, HENRY	hadams2	hadams1@aol.com	Y	02/02/2013	jelkinton
02/02/2013 N/A 08/16/2020 YR - National EDIT					
Number of logins for hadams2: 0					
Number of status changes by hadams2: 0					
* Adams, Kate	kadams2	sk1710@aol.com	Y	06/20/2019	jelkinton
06/20/2019 N/A 06/10/2020 YR - National EDIT					
Number of logins for kadams2: 0					
Number of status changes by kadams2: 0					
* Bigley, Robert	rbigley1	robertb@k Stef.us	Y	09/23/2010	jelkinton
09/23/2010 N/A 01/18/2021 YR - System Administrator					
Number of logins for rbigley1: 0					
Number of status changes by rbigley1: 0					
* Bolstad, Jeffrey	jbolstad	jeff.bolstad.b603@statefarm.com	Y	05/09/2016	jelkinton
05/09/2016 N/A N/A YR - National VIEW					
Number of logins for jbolstad: 0					
Number of status changes by jbolstad: 0					
* Brady, Richard	rbrady	drbrady4@zoominternet.net	Y	06/21/2013	jelkinton
06/21/2013 N/A N/A YR - State VIEW					
Number of logins for rbrady: 0					
Number of status changes by rbrady: 0					
* Broccoli, Karly	kbroccoli	broccolikarly@gmail.com	Y	09/11/2020	mmartinez
09/11/2020 N/A 09/23/2020 KTEF - Manager					
Number of logins for kbroccoli: 0					
Number of status changes by kbroccoli: 0					
* Butterfield, Richard	rbutterfield	corsair2@swcp.com	Y	05/26/2015	jelkinton
05/26/2015 N/A N/A YR - National VIEW					
Number of logins for rbutterfield: 0					
Number of status changes by rbutterfield: 0					
* Cardenas, Una	ucardenas	una@gektusa.org	Y	03/22/2010	jelkinton
03/22/2010 N/A 01/21/2021 YR - National EDIT					
Number of logins for ucardenas: 0					
Number of status changes by ucardenas: 0					
* Coelho, Joaquim	jcoelho	marcim@k Stef.us	Y	12/16/2020	mmartinez
12/16/2020 N/A N/A YR - National VIEW					
Number of logins for jcoelho: 0					
Number of status changes by jcoelho: 0					

* In first column signifies access to other local commanderies
N/A - data is not available

1/21/2021 12:46:38 PM Page: 1 of 23 pages. UserAccess2

Print 23 sheets of paper

Destination: CutePDF Writer

Pages: All

Copies: 1

Color: Color

More settings

Paper size: Letter

Pages per sheet: 1

Quality: 600 dpi

Scale: Fit to paper

Print using system dialog... (Ctrl+Shift+P)

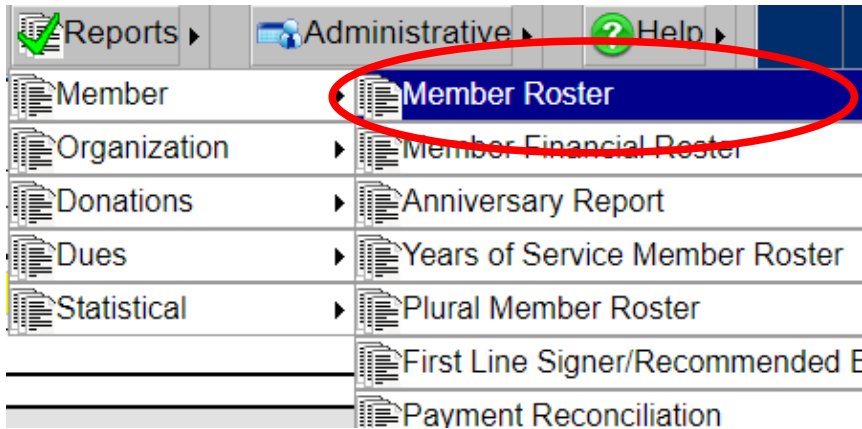
User Access Report Parameters Used: Ohio, Knights Templar Groups: All Active Users Only Activity Period: 1/21/2021 to 1/21/2021

User's Last, First	User Name	E-mail Address	Active	Status Changed	Changed By
--------------------	-----------	----------------	--------	----------------	------------

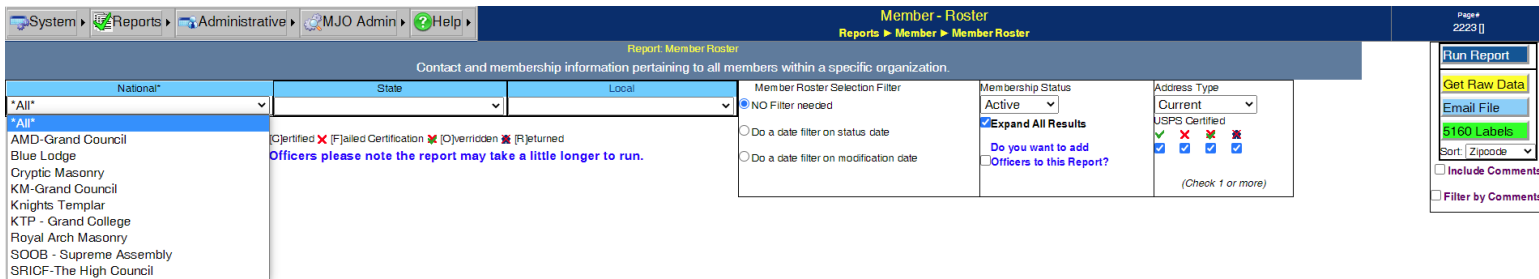


Masonic Membership Solutions User Guide

Member Roster



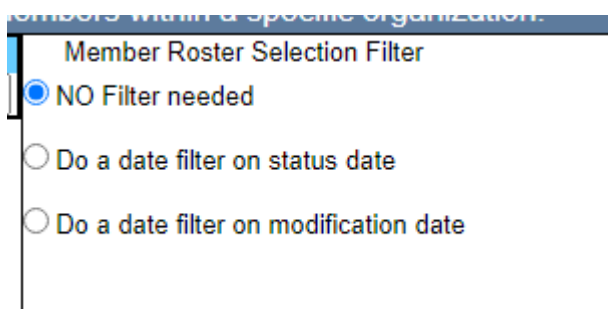
When running a member roster there are many options to select if you are searching for additional data.

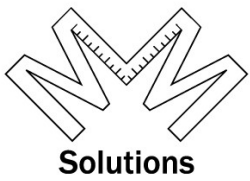


First, as with any report, you will need to choose your National, State, and Local if all 3 apply.

(Typically this will already be filled in for you according to your permissions)

There are 3 filter selections you can choose from. This will always default to **NO filter needed** but you also have the option to **Do a date filter on status date** or you can **Do a date filter on modification date**





Masonic Membership Solutions User Guide

Another option is to run a roster by the membership status. Once you click the arrow down you can choose any status to run the report on. If you want to add officers you can check the box to add officers.

Membership Status
Active
 Expand All Results
Do you want to add
 Officers to this Report?

Membership Status
Active
Active
All
Add-Adj
Affiliated
Candidate
Candidate-Inactive
Deceased
DelAdj-Active
DelAdj-InActive
Demitted
Expelled
Knighted
Petitioner
Reinstated
Rejected
Suspended

Another option is to filter by address. If you are looking for certified, overridden, returned, or not certified addresses you can sort that way after choosing what address you are searching for.

Address Type
Current
Current

Home/Primary
Alternate
Seasonal

Address Type
Current
USPS Certified

(Check 1 or more)

The last few options you can add is to sort by **Zipcode** or **Last Name** by clicking the dropdown arrow which only applies to 5160 labels.

There is also the option to **Include Comments** and then you can **Filter by Comment**.

Once you have applied all filters you are looking to add you can then **Run Report**.

Depending on Permissions you can also **Get Raw Data**

Run Report
Get Raw Data
Email File
5160 Labels
Sort: Zipcode
 Include Comments
 Filter by Comments



Masonic Membership Solutions User Guide

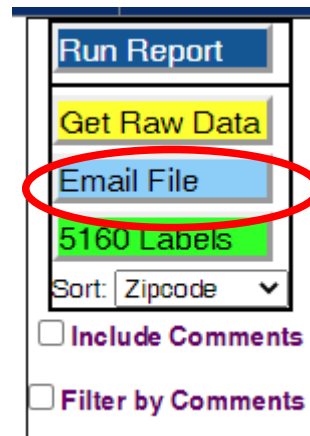
Once you run the report, this is what the header will look like and the information that is provided.

Member's Name (Last, First Middle)	Member#	Birth	Death	Age	Status	Status Date	Modified Date
CFOR Kind Address			LS,P,AP,GMC,GCC		Red Cross	Malta	Knighted
Work Email	Home Email		Home#		Cell#		Work#
Plural State	Commandery	LS P AP GMC GCC	Member#		Status	Status Date	
Knights Templar							1,529
							1,529
							63

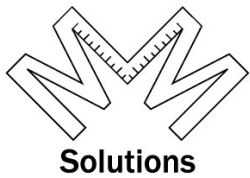
Another option is to run an email file. This will pull a list of all members that have an email in the system. If a member does **not** have an email listed in the system they will **not** show on the list.

If a member has a work and a personal email or just one or the other, they will appear on the list. The email file is also already deduped. So, if a person is a member in multiple bodies, they will only appear on the file one time.

This can also help you create an email file since it is run off the live MMS database using all the standard filters and status.

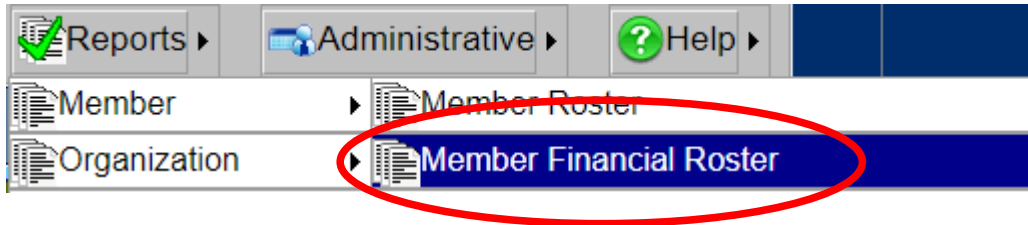


Membership Num	Full Name LFM	Home Email	Work Email	First Name	Middle Name	Last Name	Suffix	Status Date	Status	Last Mod Date
1515258	Test, Corrie	cgroth@mjdodata.com		Corrie		Test		01/01/2023	Knighted	01/06/2023



Masonic Membership Solutions User Guide

Member Financial Roster



System | Reports | Administrative | Help

Member Financial - Roster
Reports | Member | Member Financial Roster

Page# 2261

Report: Member Financial Roster
Contact, membership and financial information pertaining to all members within a specific organization.

National* | State | Local | Membership Status | Address Type | Financial Status

All | | | Active | Current | [B]alance Owed

USPS Certified: [C]ertified [F]ailed Certification [O]verridden [R]eturned

Financial Status: Account has [B]alance Due [N]o Balance [C]redit Balance

If you've selected Include Financial Details, please note the report may take a little longer to run.

[N]o Balance
 [C]redit Balance
(Check 1 or more above)
 Include Financial Details
 Expand All

Run Report

First you will need to choose your National, State, and Local if all 3 apply.
(Typically this will already be filled in for you according to your permissions)

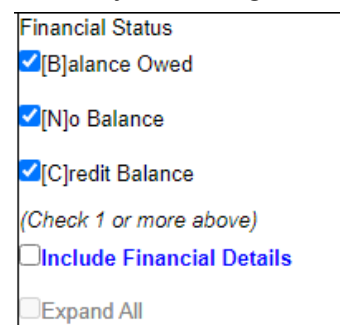
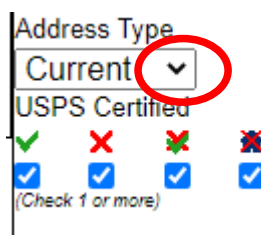
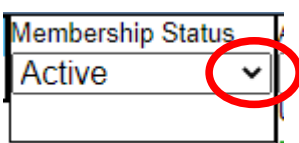
This report will provide contact, membership and financial information pertaining to all members within a specific organization.

This report also has a few filters that you can use to locate the exact information you are looking for.

Member Status you can click on arrow to choose a status to filter.

Address Type you can click the drop down and filter from there as well

Financial Status you can check balance owed, credits given and so on by checking a box next to what status you are searching for.





Masonic Membership Solutions User Guide

Once you run the report, the headers will display as followed.

Member Financial Report								Count: 224	
Report Parameters Used: Commandery: 10 - Cyrene, Alabama & [Current] & [C]ertified [F]ailed [O]verridden [R]eturned & [B]alance Due [N]o Balance [C]redit Balance									
Knights Templar » Grand Commandery » Commandery						Balance Sum		Count	
Member Name			Member Num	Birth Date	Death Date	Bialance	Status	Status Date	Member Date
CFOR	Kind	Address			Email		Home Phone		
Knights Templar						\$8656.00			1
[REDACTED]						\$8656.00			1
[REDACTED]						\$8656.00			224



Masonic Membership Solutions User Guide

Anniversary Report

This report will give you members birthdays by month or a date range. In addition, you can run a report to get dates for when your members received their highest order.

You will need to choose your National, State, and Local if all 3 apply.
(Typically this will already be filled in for you according to your permissions)

The screenshot shows the 'Reports - Anniversary' interface. It includes a navigation bar with 'System', 'Reports', 'Administrative', and 'Help'. The main title is 'Reports - Anniversary' with a sub-path 'Reports > Member > Anniversary Report'. Below the title, there are filters for 'National*' (set to '*All*'), 'State', and 'Local'. A 'Which Anniversary?' section has radio buttons for 'Birthday' and 'by DateRange'. The 'by DateRange' option is selected, and there is a '*Select*' dropdown menu. Other options include 'Membership Status' (set to 'Active'), 'Address Type' (set to 'Current'), and 'USPS Certified' (checked). A 'Run Report' button is visible on the right side.

With this report there are several options to choose from.

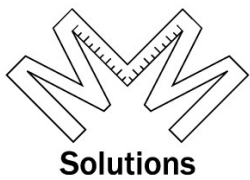
Which Anniversary - The report can be ran for a birthday or a members highest order.

This screenshot shows the 'Which Anniversary?' section with two radio button options: 'Birthday' and 'Knighthood'. The 'Birthday' option is selected.

This screenshot shows the 'Which Anniversary?' section with two radio button options: 'Birthday' and 'Knighthood'. The 'Knighthood' option is selected.

Date select - After choosing Anniversary you can filter by Month or a date range.

This screenshot shows the 'Date select' options. There are two radio button options: 'by Month' and 'by DateRange'. The 'by DateRange' option is selected. Below the 'by DateRange' option, there are two input fields labeled 'From:' and 'Thru:'. A red circle highlights the dropdown arrow of the '*Select*' dropdown menu.



Masonic Membership Solutions User Guide

Member Status - Click on arrow to choose a status to filter.

Address Type - Click the drop down and filter from there as well. If you are looking for certified, overridden, returned, or not certified addresses you can sort that way after choosing what address you are searching for.

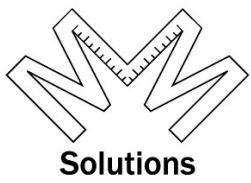
One of the options you can add is to sort by **Zipcode** or **Last Name** by clicking the dropdown arrow, which only applies to 5160 labels.

Once you have applied all filters you can then **Run Report**.

Depending on Permissions you can also **Get Raw Data**.

After you have set all the parameters and run the report, the information will display as followed.

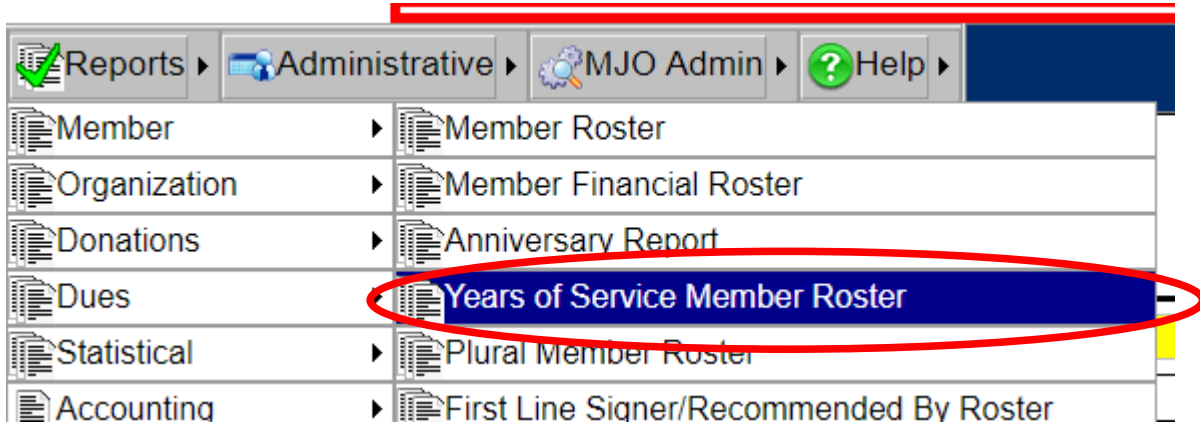
Member's Name (Last, First Middle)	Member#	Birth	Age	Status	Status Date	Modified Date
CFOR Kind Address		LS,P,AP,GMC,GCC		Red Cross	Malta	Knighthood
Work Email Home Email		Home#		Cell#		Work#
Plural State Commandery	LS P AP GMC GCC	Member#		Status	Status Date	
Knights Templar						68
[Redacted]						68
[Redacted]						31



Masonic Membership Solutions User Guide

Years of Service Member Roster

This report allows a user to see members within different ranges of service time. Below are just a few examples of how a user may want to view their data and/or run the report:



1. To see all of your current members who are at 25 years of ACTIVE service, you would type 25.0 to 25.9 into the Years Of Services boxes.

Report: Years of Service Member Roster
 Report of members, who have been in good-standing based on years of service requested for this report. Service years are across Local Bodies and account for a break in service. If you find any discrepancies, please contact your System Administrator

Grand Commandery*	State	Commandery [NUMBER]	Years of Service
Knights Templar	Ohio	*All*	25.0 to 25.9

Years of Service example - If you are looking for all members that are in year 49 but not yet 50 you would supply 49.0-49.9

Run Report
5160 Labels
Sort: Zipcode

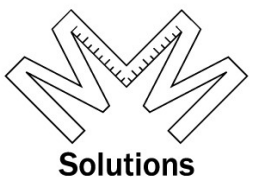
2. To see your current members who are ALMOST at 50 years of ACTIVE service, you would enter 49.0 to 49.9 into the Years Of Service boxes.

Report: Years of Service Member Roster
 Report of members, who have been in good-standing based on years of service requested for this report. Service years are across Local Bodies and account for a break in service. If you find any discrepancies, please contact your System Administrator

Grand Commandery*	State	Commandery [NUMBER]	Years of Service
Knights Templar	Ohio	*All*	49 to 49.9

Years of Service example - If you are looking for all members that are in year 49 but not yet 50 you would supply 49.0-49.9

Run Report
5160 Labels
Sort: Zipcode



Masonic Membership Solutions User Guide

3. To see your current members who are AT (or over) 50 years of ACTIVE service, you would enter 50.0 to 50.9 (or any number larger than 50.9) into the Years Of Service boxes.

Grand Commandery*	State	Commandery [NUMBER]	Years of Service
Knights Templar	Ohio	*All*	50 to 50.9

Years of Service example – If you are looking for all members that are in year 49 but not yet 50 you would supply 49.0-49.9

It is important to understand HOW the report calculates ACTIVE service. This is NOT based solely on a Knighting Date in the system. This is because we need to account for members who had a break in service for any time after being knighted. Therefore the system calculates all **active** membership using the status date field and accounts for service breaks.

Example #1:

The screen shot below shows this member at 51 years of ACTIVE service.

Years of Service Member Roster - Parms: Ohio, Knights Templar, Knights Templar - 51.0 - 51.9 years

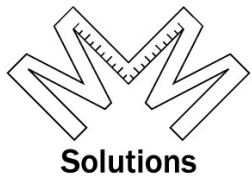
Knights Templar, Grand Commandery, Commandery										Count	
Member's Name (Last, First Middle)	CFOR	Kind	Address	Years Service	Age	MMS#	Birth	Status	Status Date	Knighted Date	
Work Email	Home Email	Home#	Cell#	Work#							
Knights Templar											46
Ohio											46
2 - Lancaster				51	85		7/17/1937	Knighted	11/20/1971	11/20/1971	1
C	Home										
6 - Reed											1

His Knighting date and status effective date are both 11/20/1971

Orders: [Redacted]

*National Knights Templar

Date	Order	State/Local
01/01/1900	Order of the Red Cross	2 - Lancaster, Ohio
01/01/1900	Order of Malta	2 - Lancaster, Ohio
11/20/1971	Order of the Temple (Knighted)	2 - Lancaster, Ohio



Masonic Membership Solutions User Guide

He has had NO BREAK of service since that date, making him at 51 years of service.

Close

Status	* Effective Date	Status	Reason	Comments	Modified Date	Archived By	First Line Signer
C	11/20/1971	Knighthood		System Upload	1/1/1900	System	

Example #2:

The screen shot below shows this member at 50 years of ACTIVE service. Lets look at his data to support that.

Years of Service Member Roster - Params: Alabama, Knights Templar, Knights Templar - 50.0 - 50.9 years

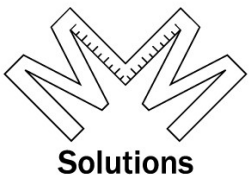
Knights Templar, Grand Commandery, Commandery									Count		
Member's Name (Last, First Middle)	CFOR	Kind	Address	Years Service	Age	MMS#	Birth	Status	Status Date	Knighthood Date	
Work Email	Home Email	Home#	Cell#	Work#							
Knights Templar											2
Alabama											2
2 - Mobile											1
[Redacted]				50	90	[Redacted]	2/15/1933	Knighthood	3/11/1973	3/11/1973	
C Home											
25 - Dothan											1

His Knighthood date and status effective date are both 3/11/1973

Orders: [Redacted]

*National

Date	Order	State/Local
01/01/1900	Order of the Red Cross	2 - Mobile, Alabama
01/01/1900	Order of Malta	2 - Mobile, Alabama
03/11/1973	Order of the Temple (Knighthood)	2 - Mobile, Alabama



Masonic Membership Solutions User Guide

He Demitted from Jackson-13 on 12/22/2011 which, at first, looks like he would NOT qualify as a 50 year member.

Person [Redacted]							
<input type="button" value="Edit"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>							
Past & Present Membership Status History							
	*	Status Effective Date	Status	Reason	Comments	Modified Date	Archived By
	C	12/22/2011	Demitted			01/06/2012	rhoover
	P	9/26/1963	Knighthood		System Upload	01/01/1900	System

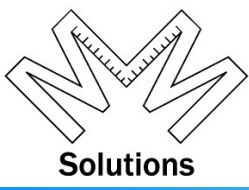
But, in the meantime, he Affiliated into Lookout-14 on 10/21/2001. This active time overlaps with his Jackson-13 membership, allowing him to have 50 years of ACTIVE service.

Person [Redacted]							
<input type="button" value="Edit"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>							
Past & Present Membership Status History							
	*	Status Effective Date	Status	Reason	Comments	Modified Date	Archived By
	C	10/21/2001	Affiliated			01/06/2012	rhoover

Example #3:

The screen shot below shows this member is at 50 years of ACTIVE service.

Years of Service Member Roster - Params: 36 - Lexington, Tennessee - 50.0 - 999.9 years																														
Knights Templar, State, Commandery																														
Member's Name (Last, First Middle)	CFOR	Kind	Address	Years	Member#	Birth	Death	Status	Status Date	Knighthood Date	Count																			
			Work Email			Home Email	Home#	Cell#	Work#																					
<input type="checkbox"/> Knights Templar <ul style="list-style-type: none"> <input type="checkbox"/> Tennessee <ul style="list-style-type: none"> <input type="checkbox"/> 36 - Lexington <ul style="list-style-type: none"> Maness, Roy <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">C</td> <td style="width: 10%;">Home</td> <td style="width: 30%;">16250 Highway 412 E, Lexington, TN 38351-7711</td> <td style="width: 10%; text-align: center;">50</td> <td style="width: 10%;">1407048</td> <td style="width: 10%;">05/23/1928</td> <td style="width: 10%;"></td> <td style="width: 10%;">Reinstated</td> <td style="width: 10%;">01/01/1964</td> <td style="width: 10%;">10/31/1958</td> </tr> </table> Reed, George Lee <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">C</td> <td style="width: 10%;">Home</td> <td style="width: 30%;">143 New Renfroe St, Lexington, TN 38351-1351</td> <td style="width: 10%; text-align: center;">52</td> <td style="width: 10%;">1407079</td> <td style="width: 10%;">04/10/1928</td> <td style="width: 10%;"></td> <td style="width: 10%;">Knighthood</td> <td style="width: 10%;">11/30/1961</td> <td style="width: 10%;">11/30/1961</td> </tr> </table> 										C	Home	16250 Highway 412 E, Lexington, TN 38351-7711	50	1407048	05/23/1928		Reinstated	01/01/1964	10/31/1958	C	Home	143 New Renfroe St, Lexington, TN 38351-1351	52	1407079	04/10/1928		Knighthood	11/30/1961	11/30/1961	5 5 5
C	Home	16250 Highway 412 E, Lexington, TN 38351-7711	50	1407048	05/23/1928		Reinstated	01/01/1964	10/31/1958																					
C	Home	143 New Renfroe St, Lexington, TN 38351-1351	52	1407079	04/10/1928		Knighthood	11/30/1961	11/30/1961																					



Masonic Membership Solutions User Guide

He was Knighted on 10/31/1958

Orders/Degrees: [Redacted]

*National **Knights Templar**

Date	Order/Degree	National	State	Local
1/1/1900	Order of the Red Cross	Knights Templar	Tennessee	36 - Lexington
1/1/1900	Order of Malta	Knights Templar	Tennessee	36 - Lexington
10/31/1958	Order of the Temple (Knighted)	Knights Templar	Tennessee	36 - Lexington

*Order/Degree [Dropdown]
*Date Awarded [Dropdown]

Delete

If you wish to edit or delete any order, click on order row.

But his membership starts at a Reinstatement date of 1/1/1963

Person: [Redacted]

Past & Present Membership Status History

*	Status Effective Date	Status	Reason	Comments	Modified Date	Archived By
C	1/1/1963	Reinstated		System Upload	01/01/1900	rbigley1

* [C]urrent [P]ast

This shows that this member has a break of service from his Knighting Date to his first activity status on his record – which is his Reinstatement date. But since his Reinstatement date is used to determine years of active service, this member qualifies as 51 years of active service as shown on the report.

Example #4:

The screen shot below shows this person is NOT at 50 years of ACTIVE service.

He was Knighted on 11/5/1962

Orders/Degrees: **Campbell Sr., Ernest Chester**

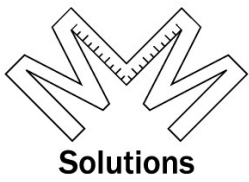
*National **Knights Templar**

Date	Order/Degree	National	State	Local
1/1/1900	Order of the Red Cross	Knights Templar	Alabama	2 - Mobile
1/1/1900	Order of Malta	Knights Templar	Alabama	2 - Mobile
11/5/1962	Order of the Temple (Knighted)	Knights Templar	Alabama	2 - Mobile

*Order/Degree [Dropdown]
*Date Awarded [Dropdown]

Delete

If you wish to edit or delete any order, click on order row.



Masonic Membership Solutions User Guide

But his membership starts at a Reinstatement date of 12/23/1989

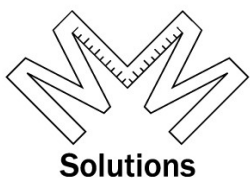
Past & Present Membership Status History							
	Status	Effective Date	Status	Reason	Comments	Modified Date	Archived By
C		12/23/1989	Reinstated		System Upload	01/01/1900	mallen

This shows that this member has a break of service from his Knighting Date to his first activity status on his record – which is his Reinstatement date. Since the calculation of Service Years is done by using the Reinstatement date only, this member does not qualify for 50+ years of active service.

******Please understand this report is based 100% on system data only. If you find any discrepancies with your results, please contact your System Administrator so DATA can be adjusted accordingly and correctly.******

Once a member qualifies for the service range supplied when the report was requested, the member will appear on all individual Commandery listings where he is an active Plural Member.

***Example: If a member is Active in 3 Commanderies and he qualifies for Service Years based on the range supplied, he will appear on the report for all 3 Commanderies**



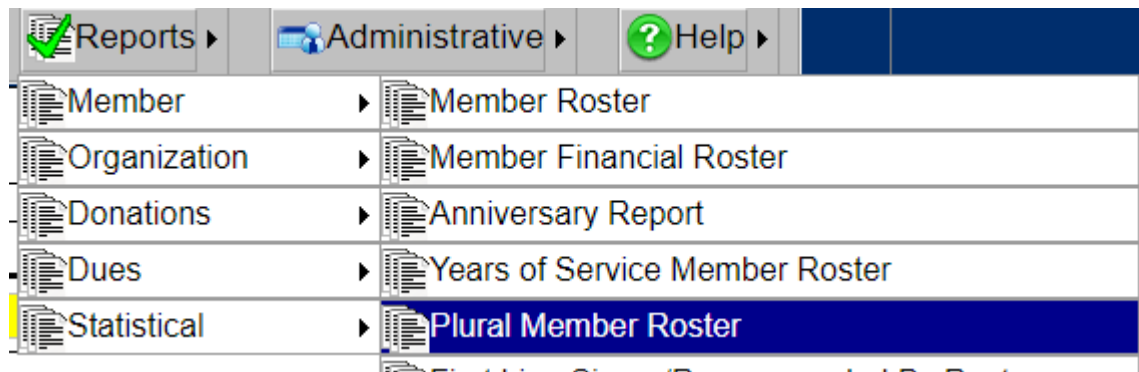
Masonic Membership Solutions User Guide

Plural Member Roster

This report consists of all members that are active in more than one local.

First, as with any report, you will need to choose your National, State, and Local if all 3 apply.

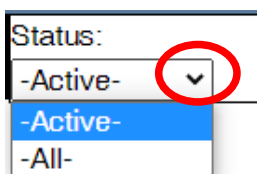
(Typically this will already be filled in for you according to your permissions)

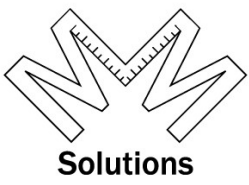


Report: Plural Member Roster				Run Report	
A report consisting of all members that are active in more than one local commandery.					
Grand Encampment	Grand Commandery*	Commandery [NUMBER]	Status:	Sort: Last Name	
Knights Templar	Missouri	3 - DeMolay	-Active-		

Once you have chosen the National, State and Local, you also have the option to choose status. Choose from Active or All.

Once all selections are made then **Run Report**.



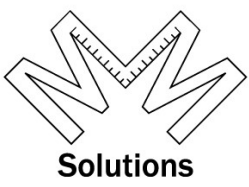


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Once you have run the report, the members names will display along with their multiple memberships. Their status in each location will also be displayed. See example below.

Plural Member Report							Parameters= 3 - DeMolay, Missouri, Knights Templar, Status:Active		RecCount = 2	
Member's Name		DOB		Address						
State	Local			Member#	Status Date	Status				
Timothy, Timothy, David		09/05/1968		XXXXXXXXXX						
Missouri	3 - DeMolay			1500490	09/28/2020	Affiliated				
Missouri	35 - Oriental			1500250	08/29/2020	Reinstated				

11/19/2021 11:11:29 AM Page: 1 of 1 pages. PluralMemberReport2

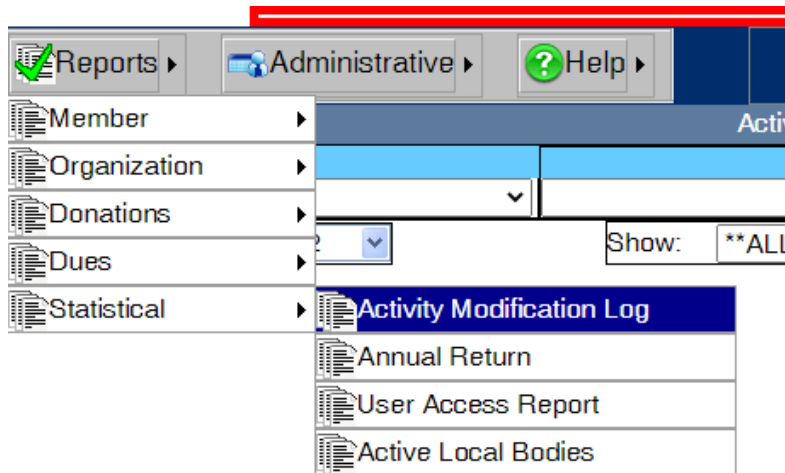


Masonic Membership Solutions User Guide

Activity Modification Log

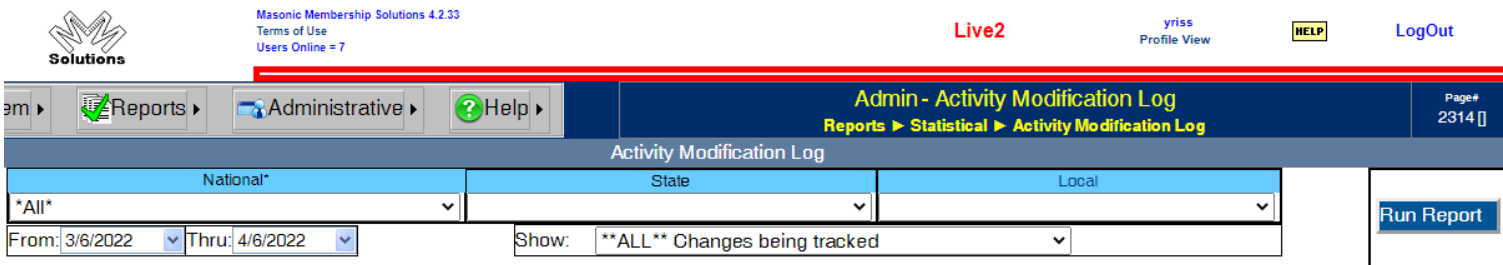
Reports - Statistical - Activity Modification Log

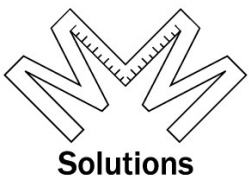
This report helps track any changes made to a members record. Secretaries and Recorders, can keep track of their data and any changes that are made and by whom.



First, as with any report, you will need to choose your National, State, and Local if all 3 apply.

(Typically this will already be filled in for you according to your permissions)





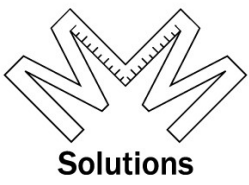
Masonic Membership Solutions User Guide

Once you choose your National, State and/or Local you can then choose a date range. There is also a dropdown where you can narrow down what you are looking for.

Grand Encampment*		Grand Commandery		Commandery [NUMBER]
Knights Templar		Missouri		3 - DeMolay
From:	3/6/2022	Thru:	4/6/2022	Show: **ALL** Changes being tracked
				<ul style="list-style-type: none"> **ALL** Changes being tracked **ALL** People: Changes People: changed Birth date People: changed Death date People: changed Email Home People: changed Email Work People: changed Phone Home People: changed Phone Work People: changed Phone Cell People: Allow KTEF Solicitation changed People: How to view magazine changed People: changed Salutation People: changed LastName People: changed MiddleName People: changed FirstName People: changed Suffix People: changed JobStatusID People: changed JobCode People: changed Employer People: changed Title

Below is an example of what the report looks like when returned. You can see that the address was changed by NCOA. This report will track any changed information.

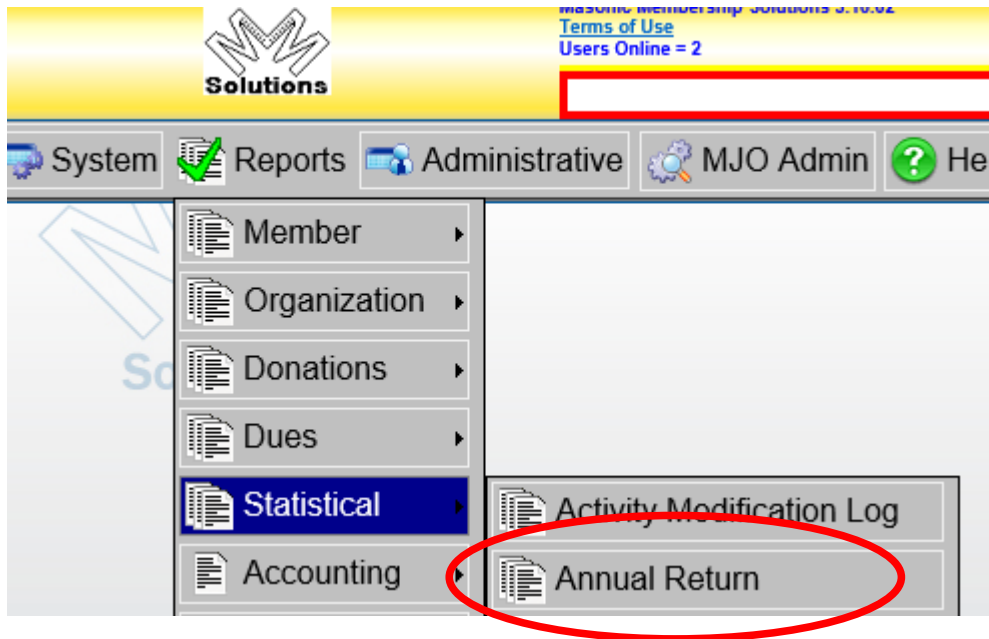
1 of 1		100%	Find Next
Changed Data Tracking Report		Report Parameters Used: Show: **ALL** Changes being tracked, From: 3/6/2022-thru-4/6/2022, For Members In: Commandery - 3 - DeMolay, Missouri, Report By: Riss, York	
Member Name	When Changed	What Changed	
Membership#	Before Change	After Change	
User ID	User's Group	User's Last, First	Transaction Group#
██████████	03/29/2022 00:00:00A	People Addresses: Home/Primary changed	
██████████	[C] 91 ██████████	[C] ██████████ MO 65234 2884	
NCOA	NCOA Address Change,		
4/6/2022 2:15:18 PM		Page: 1 of 1 pages.	ACDreport01



Masonic Membership Solutions User Guide

Annual Return

Reports / Statistical / Annual Return



Once the report opens, the user will see a red message stating that running the report with a Thru Date of today will cause the report to be marked as a preliminary report and can NOT be used as the official report for the Commandery.

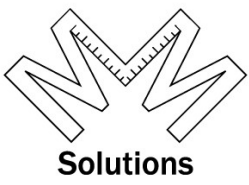
Report - Annual Return
Membership information to complete and file the Annual Return within a specific organization

National*	State	Local
All		

Report Format: Please Select a National Body first
From Date: 1/1/2019
Thru Date: 3/20/2019

Run Report

Because you have selected today as your "Thru Date" all reports are considered to be preliminary. Final reports are run after the "Thru Date". This allows you up to midnight to make changes to your database before the Annual Return is considered closed.



Masonic Membership Solutions User Guide

Preliminary

Annual Statistical Report - Start: 1/1/2019 End: 3/20/2019
Grand Encampment of Knights Templar
Grand Commandery of Alabama
Stationed at Birmingham, AL

Total Working Commanderies = _____ (Future publications will include this number)

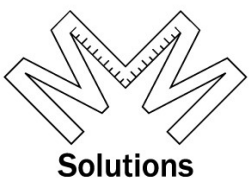
The following is a recapitulation of membership activity during the specified reporting period.

Total number members on last return =		1,189
Total number KNIGHTED =	0	
Total number AFFILIATED =	0	
Total number DEINSTATED =	0	

The user must select a From Date and a Thru Date. Note: the Thru Date MAY NOT be in the future

From Date	Thru Date
1/1/2019	3/21/2019

The user must also select the appropriate Report Format. Different Organizations will have different formats.



Masonic Membership Solutions User Guide

Statistical Report Only – This is formatted to be a 1 page (8-1/2 x 11 printed) document that gives the overall breakdown of the Commanderies memberships and exemptions for the Return.

Preliminary

Annual Statistical Report - Start: 1/1/2019 End: 3/21/2019

York Rite

Grand Encampment of Knights Templar

Stationed at Bellaire, TX

Total Working Commanderies = _____ (Future publications will include this number)

The following is a recapitulation of membership activity during the specified reporting period.

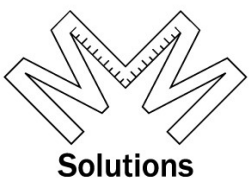
Total number members on last return =		<u>78,798</u>
Total number KNIGHTED =	<u>428</u>	
Total number AFFILIATED =	<u>334</u>	
Total number REINSTATED =	<u>166</u>	
Total number ADD ADJUSTMENT =	<u>0</u>	
Total Gain (+)	<u>928</u>	
Total number DEMITTED =	<u>485</u>	
Total number SUSPENDED =	<u>859</u>	
Total number DECEASED =	<u>624</u>	
Total number EXPELLED =	<u>0</u>	
Total number DELETE ADJUSTMENT =	<u>8</u>	
Total Loss (-)	<u>1,976</u>	
Net Gain (Net Loss) =		<u>(1,048)</u>
Total number of members (including Dual and Plural) on this report as of		<u>77,750</u>

KNIGHTS TEMPLAR EYE FOUNDATION

Living/Active Life Sponsors =	<u>40,739</u>
Living/Active Associate Patrons =	<u>481</u>
Living/Active Patrons =	<u>286</u>
Total Deductions	<u>41,506</u>

Note: A "Living/Active" member may be counted only once for an Eye Foundation deduction even if the member has purchased multiples within a level or across levels.

Example: If member has 2 Life Sponsors, 1 Associate Patron and 3 Patrons he is counted as 1 in Life Sponsor or if member has 2 Associate Patrons and 1 Patron he is counted as 1 in Associate Patron.



Masonic Membership Solutions User Guide

NOTE: If for any reason, a user sees a red number on the right side of this report, they must call their System Administrator because there is a problem with their data.

Example

Total number of members
(including Dual and Plural) 03/20/2013 = 93 * 92
on this report as of

* Your Annual Return can not calculate correctly because of a data issue, please call your System Administrator.

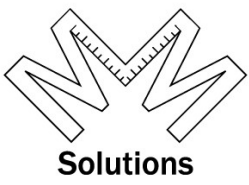
Annual Report Detail Only – Part 1 Statistical – This report matches the *Activity Report – Based on Modified Date* and will be a supporting document to use when validating your membership totals on the *Statistical Report Only* format (mentioned above)

Grand Commandery*	State	Commandery [NUMBER]
Knights Templar	Kentucky	28 - Ashland

Report Format	From Date	Thru Date
Annual Report Detail Only - Part 1 Statistical	1/1/2012	12/31/2012

Annual Report Detail Only											Modified Date
All activity is based on the modified date (when updated) that falls within requested date range											Modified Date
Part 1 Statistical	Active Members At Start	Knights (+)	Demit (-)	Affiliate (+)	Suspend (-)	Reinstate (+)	Expel (-)	DelAdj (-)	Died (-)	AddAdj (+)	Active Members At-End
Knights Templar	133	+2	-2		-3				-7		123
Kentucky	133	+2	-2		-3				-7		123
28 - Ashland	133	+2	-2		-3				-7		123
Adams, Howard C.	1319383								12/20/11		12/27/12
Bailey, Homer	1319388				06/30/12						06/30/12
Bush, Cecil Maynard	1319407								02/18/12		02/18/12
Caskey, Kristin M.	1319413				06/30/12						06/30/12
Church, Beachal R.	1319417								03/16/12		03/16/12

Call Admin
92
92
92



Masonic Membership Solutions User Guide

Annual Report Detail Only – Part 2 KTEF Deductions - This report matches the *KTEF Exemption Roster* and will be a supporting document to use when validating your exemption totals on the *Statistical Report Only* format (mentioned previously)

Grand Commandery*	State	Commandery NUMBER
Knights Templar	Kentucky	28 - Ashland

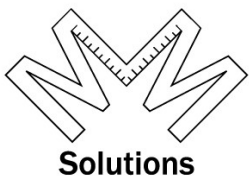
Report Format: Annual Report Detail Only - Part 2 KTEF Deductions
 From Date: 1/1/2019 Thru Date: 3/21/2019

Because you have selected today as your "Thru Date" all reports are considered preliminary. Final reports are run after the "Thru Date". This allows you up to make changes to your database before the Annual Return is considered

Navigation: 1 of 1 | 100% | Find | Next | Select a format | Export

Preliminary

Annual Report Detail Only – Part 2 KTEF Deductions										From:1/1/2019	Thru:3/21/2019		
Knights Templar, State, Commandery													
Last, First Middle	Exemption Effective	Receipt#	Birthdate	Sponsorship Kind	City	State	Member#	Status	Status Date	LastMod	Members with Exemptions		
							LS	AP	P				
Kentucky							20	3					23
28 - Ashland							20	3					23
Allen, Burton Edward	04/09/2008	273765	09/09/1939	Life Sponsors-88	Ashland	KY	1319384	Knighted	10/22/1994				
Bell, Ronald D.	02/11/1971	34660	03/22/1937	Life Sponsors-88	Ashland	KY	1319392	Knighted	09/21/1962				
Berry, William Everett	12/27/1993	197054	05/30/1945	Life Sponsors-88	Flatwoods	KY	1319394	Knighted	10/23/1982				
Bryant, Jeffrey	04/19/2006	266104	07/09/1964	Life Sponsors-88	Flatwoods	KY	1319402	Knighted	02/20/1999				

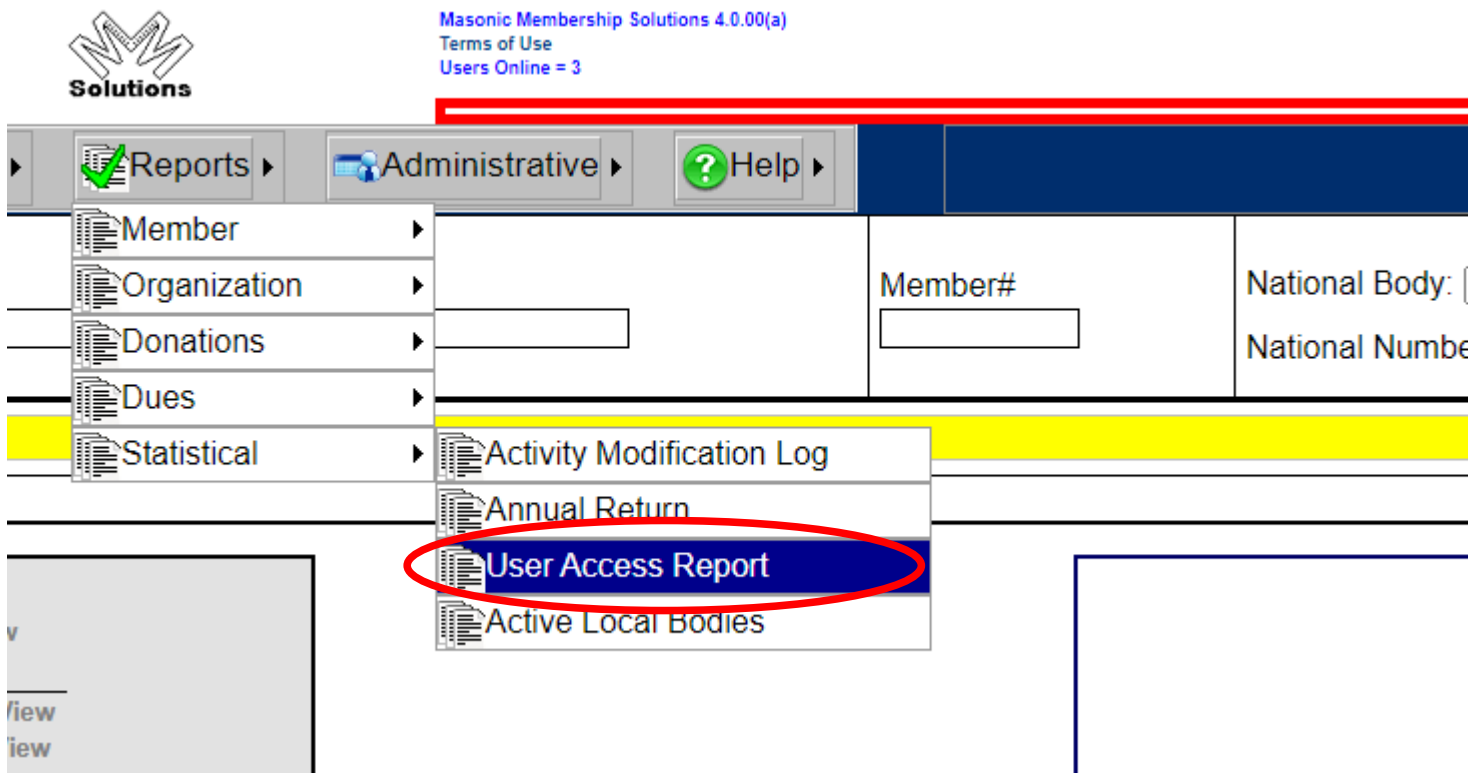


Masonic Membership Solutions User Guide

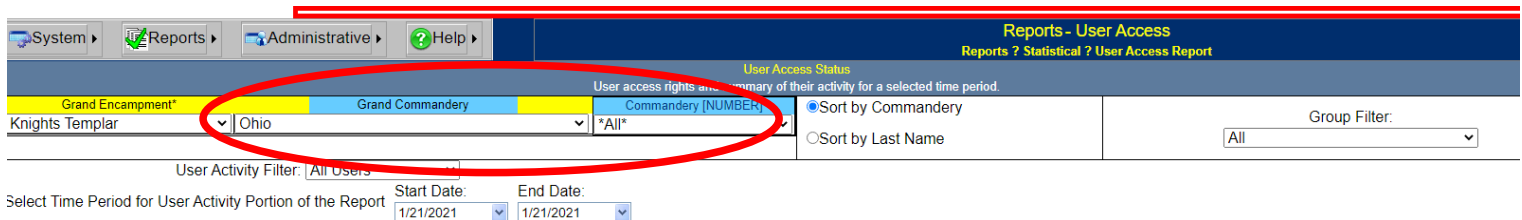
Reports

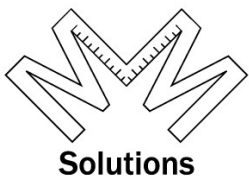
User Access Report

This report is only available to Grand Recorders.
Go to Reports / Statistical / User Access Report



A. As a Grand Recorder, you have the option of running this report for your whole State or at each Local level





Masonic Membership Solutions User Guide

B. In addition, you can sort the data in the report by Commandery or Last Name order.

System | Reports | Administrative | Help

Reports - User Access
Reports ? Statistical ? User Access Report

User Access Status
User access rights and summary of their activity for a selected time period.

Grand Encampment* | Grand Commandery | Commandery (NUMBER) | Sort by Commandery
Knights Templar | Ohio | *All* | Sort by Last Name

Group Filter: All

User Activity Filter: All Users

Select Time Period for User Activity Portion of the Report
Start Date: 1/21/2021 | End Date: 1/21/2021

C. The report allows you to filter based on activity made by a user who is either **Active** or **Inactive** or **ALL** (which is the default option).

User Activity Filter: All Users

User Activity Filter: Active Users Only

User Activity Filter: Inactive Users Only

D. Lastly, the report allows you to filter the data/activity based on a specific date range.

System | Reports | Administrative | Help

Reports - User Access
Reports ? Statistical ? User Access Report

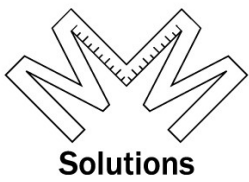
User Access Status
User access rights and summary of their activity for a selected time period.

Grand Encampment* | Grand Commandery | Commandery (NUMBER) | Sort by Commandery
Knights Templar | Ohio | *All* | Sort by Last Name

Group Filter: All

User Activity Filter: All Users

Select Time Period for User Activity Portion of the Report
Start Date: 1/21/2021 | End Date: 1/21/2021



Masonic Membership Solutions User Guide

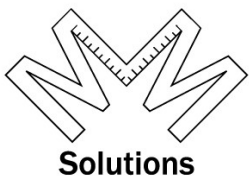
**Sample of report for activity from all active users (in all MMS groups)
within Ohio on January 21, 2021.**

User Access Report							Parameters Used: Ohio, Knights Templar Groups: All Active Users Only Activity Period: 1/21/2021 to 1/21/2021		
Knights Templar, State, Commandery									
User's Last, First	User Name	E-mail Address	Active	Status Changed	Changed By				
Date Account Created	First User Login	Most Recent Login	User's Group Access						
<input type="checkbox"/> Knights Templar 0 changes 154 unique users									
<input type="checkbox"/> Ohio 0 changes 154 unique users									
<input type="checkbox"/> GRAND COMMANDERY 58 users									
* ADAMS, HENRY	hadams2	hadams1@aol.com	Y	02/02/2013	jelkinton				
02/02/2013	N/A	08/16/2020	YR - National EDIT						
Number of logins for hadams2: 0				Number of status changes by hadams2: 0					
* Adams, Kate	kadams2	sk1710@aol.com	Y	06/20/2019	jelkinton				
06/20/2019	N/A	06/10/2020	YR - National EDIT						
Number of logins for kadams2: 0				Number of status changes by kadams2: 0					
* Bigley, Robert	rbigley1	robertb@ktef.us	Y	09/23/2010	jelkinton				
09/23/2010	N/A	01/18/2021	YR - System Administrator						
Number of logins for rbigley1: 0				Number of status changes by rbigley1: 0					
* Bolstad, Jeffrey	jbolstad	jeff.bolstad.b603@statefarm.com	Y	05/09/2016	jelkinton				
05/09/2016	N/A	N/A	YR - National VIEW						
Number of logins for jbolstad: 0				Number of status changes by jbolstad: 0					
* Bradv Richard	rbradv	drbradv4@zoominternet.net	Y	06/21/2013	ielkinton				

The following data is shown:

- Users Last and First full name
- User name for logging in
- Email Address for this user
- Active flag – **N** not active or **Y** active
 - o How to get an N
 - If the email on file has been sent to and it has been returned as “undeliverable”
 - If we have been informed that the person is no longer the Recorder or the person currently assigned access should not have access
 - If we have seen NO activity in 12 months prior to Aug 1, 2014
- Status Changed – when the Active Flag was last modified
- Changed by – who was the last person to modify the Active Flag
- Date Account Created – the date the account was created
- First User Login – the date the user first logged into the system
- Most Recent Login – the date the user last logged into the system
- User's Group – what access group the user is in
- Number of status changes by <username>: xxxx
 - XXXX = this number is only tracking the status changes

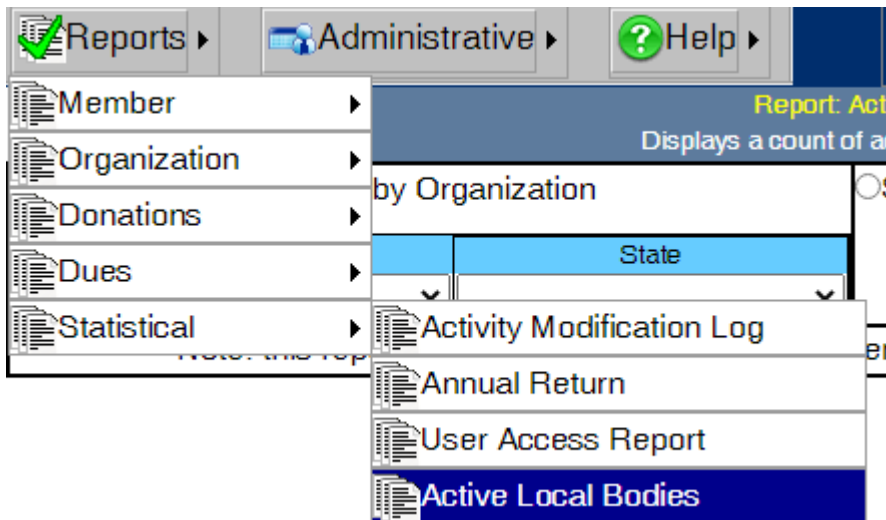
(Knighthood / Affiliation / Reinstated / Suspended / Demitted)



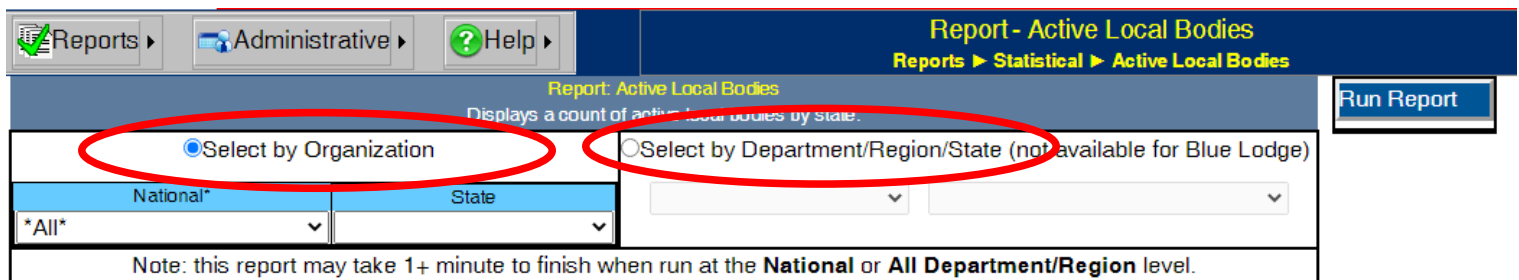
Masonic Membership Solutions User Guide

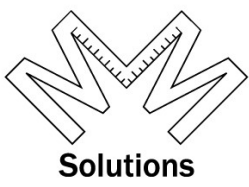
Active Local Bodies

This report can be run for your National or by your Department/ Regions.



First choose if you want to run by National or by your Department/ Regions.





Masonic Membership Solutions User Guide

Below is an example of Knights Templar Missouri. There are 26 active bodies in Missouri.

Report: Active Local Bodies
Displays a count of active local bodies by state.

Select by Organization Select by Department/Region/State (not available for Blue Lodge)

Grand Encampment* Grand Commandery
Knights Templar Missouri

Note: this report may take 1+ minute to finish when run at the National or All Department/Region level.

1 of 1 100% Find | Next

Active Commandery Count - Parms: Missouri

Grand Commandery	Active Commandery Count
Missouri	26
Total:	26

4/6/2022 2:38:20 PM Page 1 of 1 ActiveLocals

The next example shows Active Local Bodies run by Departments. Once you choose your National you can then click the drop down to choose your department.

Report: Active Local Bodies
Displays a count of active local bodies by state.

Select by Organization Select by Department/Region/State (not available for Blue Lodge)

National* State
All Knights Templar

All Departments
All Departments

Asia Pacific
East Central
European & Africa
Latin America & Caribbean
Mid-Atlantic
North Central
Northeastern
Northwestern
South Central
Southeastern

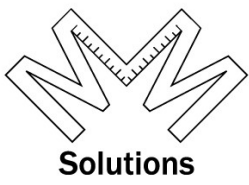
Note: this report may take 1+ minute to finish when run at the National or All Department/Region level.

1 of 1 100% Find | Next

Active Commandery Count - Parms: Asia Pacific

Grand Commandery	Active Commandery Count
GE Subordinate - Asia Pacific	2
Philippines	20
Total:	22

4/6/2022 2:40:21 PM Page 1 of 1 Active

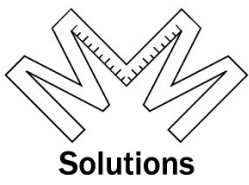


Masonic Membership Solutions User Guide

Data Checks

This report has many different filtering options. This is also a great way to check your data and find what information you may need for your members or to confirm you have the correct information.

One of the first options is to pull your report based on a members status by clicking on the dropdown. For example if you only want to see members that are Active just choose Active from the drop down.



Masonic Membership Solutions User Guide

There are also many other options to filter this report by. Once you choose from the list click next to the option you want. The dot next to that option will turn blue.

- USPS Certified: [C]ertified [F]ailed Certification [O]verridden [R]eturned
- Missing Birthdate
 - Birthdate Verification needed - date indicates age over 100
 - USA Address – Failed Certification
 - Bad USA Address – Returned Undeliverable
 - Missing Order of the Temple Date
 - No Phone - Members without Home and Work and Cell
 - No Email - Members without Home or Work Email

After all your selections have been made you can run your report.

Reports > Member > Member Data Checks

Report: Data Check Report
A list of members with certain error conditions.

Grand Encampment* Grand Commandery Commandery [NUMBER] Membership Status Address Type

USPS Certified: [C]ertified [F]ailed Certification [O]verridden [R]eturned

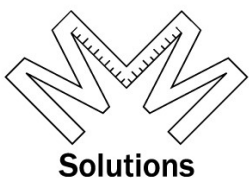
- Missing Birthdate
- Birthdate Verification needed - date indicates age over 100
- USA Address – Failed Certification
- Bad USA Address – Returned Undeliverable
- Missing Order of the Temple Date
- No Phone - Members without Home and Work and Cell
- No Email - Members without Home or Work Email

Run Report
Get Raw Data

1 of 1 | 100% | Find | Next

Data Check: Missing DOB - Parms: 109 - Melrose, Texas, Knights Templar - Status: Active Kind: Current AddrCert: C F O R

Member's Name (Last, First Middle)	Member#	Birth	Age	Status	Status Date	Modified Date	
CFOR	Kind	Address	Home Email	LS,PAP,GMC,GCC	Home#	Red Cross	
Work Email	Plural	State	Commandery	LS P AP GMC GCC	Member#	Status	Status Date
Work#	Cell#	Work#	Knighthood	Malta	Knighthood	Malta	Knighthood
<input checked="" type="checkbox"/> Knights Templar							
<input checked="" type="checkbox"/> Texas							
<input checked="" type="checkbox"/> 109 - Melrose							
Farza, Ranita Y	1500004	unknown		Knighthood	06/19/2018	06/20/2018	



Masonic Membership Solutions User Guide

Order/Degree Progression Report

Reports - Member - - Order/Degree Progression Status

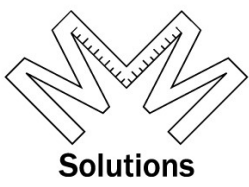
In this report you have the ability to pull a report for your members by Membership Status.

For example If you are looking for Members that have more orders to receive you can run the report and see who may be eligible to earn their next order.

You can run a report for Knights Templar looking for members who are Malta and not yet Temple.

Once the report has been run you will receive the list of members who still need to be Knighted.

Member's Name (Last, First Middle)	Member#	Birth	Age	Status	Status Date	Modified Date
CFOR Kind Address		LS,P,AP,GMC,GCC		Red Cross	Malta	Knighed
Work Email Home Email		Home#		Cell#		Work#
Plural State Commandery	LS P AP GMC GCC	Member#		Status	Status Date	
Knights Templar						1
Alabama						1
2 - Mobile						1
gt_test	1515247	unknown		Candidate	12/02/2022	12/13/2022
F Home		unknown, unknown, unknown 00000, unknown		02/21/2023	02/21/2023	



Masonic Membership Solutions User Guide

Once you have run the report you can then Click on the members name and go to the members profile.



Found	Person	DOB	Home Address	City	State	Zip
1	gt, test	01/01/1900	unknown	unknown	unknown	00000

Your search found [1] member shown above.

- Profile View
- Profile Edit**
- Address Edit
- Address View
- O.O.H.C.E.
- Orders/Degrees/Grades Edit
- Honors Edit

Save
Cancel

Prefix

*Last

*First

Middle

Suffix

From the Profile page you can then go to the Orders/Degrees/Grades Edit to review the orders or add a degree or order.

Found	Person	DOB	Home Address	City	State	Zip
1	gt, test	01/01/1900	unknown	unknown	unknown	00000

Your search found [1] member shown above. ## People ID: 256

- Profile View
- Profile Edit
- Address Edit
- Address View
- O.O.H.C.E.
- Orders/Degrees/Grades Edit**
- Honors Edit
- Elite Category Edit
- Jewels Edit
- Receipt RePrint
- Mailing Options Edit
- Mailing Options View
- Signature Maint

Orders: gt, test
If yo
Or

*National:

Date	Order	State/Local	Comments
02/21/2023	Order of the Red Cross	2 - Mobile, Alabama	
02/21/2023	Order of Malta	2 - Mobile, Alabama	

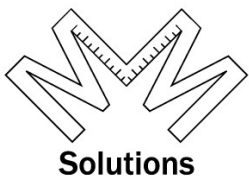
Add

Delete

Save

Cancel

Comments



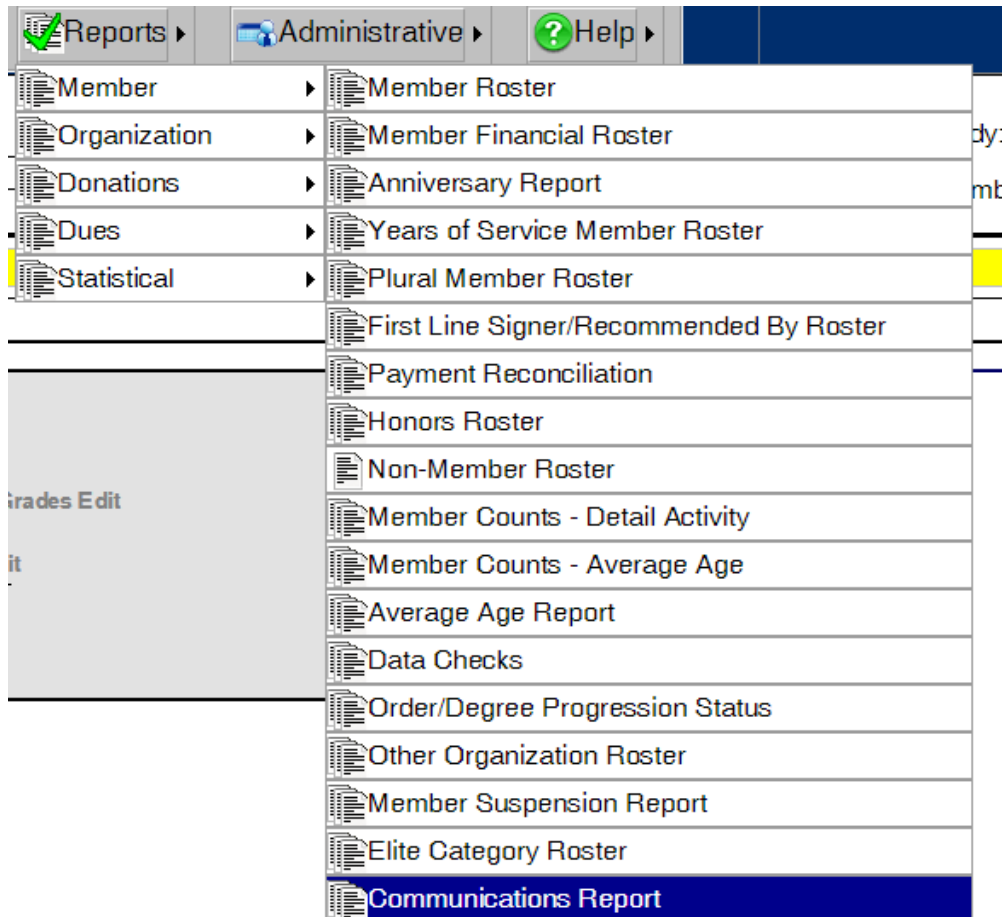
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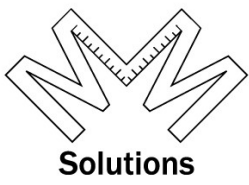
Communication Report

This report is found under Reports / Member / Communication Report

This report is designed to show the counts and types of email addresses and phone numbers for your members.

This will also show for the Knights Templar report ONLY how members will receive their Knights Templar magazine whether by US mail or by viewing On-line.





Masonic Membership Solutions User Guide

This Report can be run by National / All or State level

You can also run by Department / Region / State

Report: Communication Report
Displays totals of members and communications methods.

Select by Organization Select by Department/Region/State (not available for Blue Lodge)

National*	State	<input type="text"/>	<input type="text"/>
All			
<ul style="list-style-type: none"> *All* AMD-Grand Council Blue Lodge Cryptic Masonry KM-Grand Council Knights Templar KTP - Grand College Royal Arch Masonry SOOB - Supreme Assembly SRICF-The High Council 			

Select by Organization Select by

Grand Encampment*	Grand Commandery
Knights Templar	Alabama

1 of 1 100% Find | Next

Parms - Alabama, Knights Templar

Commandery	Active Member Count	No Phone	With a Phone	Home Phone Only	Work Phone Only	Cell Phone Only	Home Work Phone Only	Home Cell Phone Only	Work Cell Phone Only	Home Work Cell Phone	No Email	With an Email	Home Email Only	Work Email Only	Home and Work Email	KT MAG Mail	KT MAG On-Line
Total	978	375	603	266	6	219	3	98	3	8	458	520	501	9	10	947	31
2 - Mobile	179	87	92	40	4	36	0	10	0	2	48	131	128	0	3	177	2
4 - Montgomery	66	8	58	11	0	31	0	14	0	2	20	46	45	0	1	65	1
7 - Huntsville	87	12	75	34	1	22	2	16	0	0	33	54	52	0	2	83	4

If you are looking for who does not have email or phone numbers you can go to Reports / Member / Data Checks