

## Lodge Membership Introduction and Overview

Lodge Membership is designed to track: Candidate progress, Member Committees, Awards, Concordant Bodies, Proficiencies, Chairs, Dues payments, Visitors and Meetings. It is **NOT an accounting system**.

The program is designed to perform many functions automatically while giving you the flexibility to override changes it may make. For example, if a member makes a payment before the Membership Start Date, the system will calculate that the payment is "Late". If the payment is within the Membership Start and End dates, the membership may still be deemed 'Late' IF the Dues Over/Under balance is < \$0.

However, in the scenario above, you can 'override' the 'Current' or 'Late' designation by adjusting the 'Year' or the 'Over/Under' balance figures according to your needs. (More on that later)

It is highly recommended that you 'experiment' with the Lodge Membership sample data. Take a look at the reports. Add and Delete a member. Pretend you are adding Dues payments or updating Candidate progress.

### IMPORT DATA:

if you have entered data from an earlier version, you can import that data into the current version. When you import data, all the 'existing' data will be erased and then the imported data will be brought in.

Exit
Lodge Setup & Dues

Categories	Amount
1) MM	\$40.00
2) PAST MSTR	\$45.00
3) ASSMT	\$50.00
4) GL Fee	\$60.00
5) DISTR FEE	\$5.00
6) WORPHNS	\$10.00

Lodge Name	Soloman Lodge No 77				
Lodge Address	222 East Elm St				
Unit					
Lodge City	Ferguson				
ST/Postal Code	MO	63602	Lodge Phone	(208)123-4567	
Lodge Country					

Years Missed until NPD 3

Add New 'Type'

Start Date	1/1/2013	Current Year	2013
End Date	1/1/2014		

Note: Enter the Type of Membership and the associated 'Categories' for each Type of Membership. The 'Type' you enter here will become the Membership Type on the Membership page.

Membership Type	MM	PAST MSTR	ASSMT	GL Fee	DISTR FEE	WORPHNS
X 50 YR MEMBERSHIP \$65.00	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
X HONORARY \$110.00	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
X LIFE MEMBER \$170.00	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				
X MASTER MASON \$160.00	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No
X PAST MASTER \$170.00	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No				

After importing, you should go into Lodge Setup (show above), and make sure that the Lodge Name, Address etc. is correct and make sure that the Dues Categories (upper right corner) and Membership Types are as you want them. Also, make sure you indicate the Start Date and End Date for your lodge's membership year. (These dates are used to help determine if a member is "Current" or "Late").

## If you are NOT importing data:

In the event that you are not importing data, you will need to remove the sample data so that you can start entering Lodge , Member, Visitor and Meeting information To do this just select, from the menu at the top of the screen: [MENU]: [Edit/Delete All Members, Visitors, Meetings and Categories.](#)

## Navigating:

There are several ways to get around in Lodge Membership.

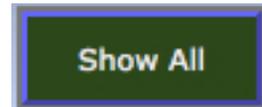
First, on the left side of the screen, you can just click on a Member's name . This will put the appropriate Member Details in the main screen. (In the picture on the right, I clicked on Charles Cordegan's name to see his detail to the right. If you do not see a member's name, just use the 'elevator' control to scroll down the list.

The screenshot shows the 'Member' details for Charles Cordegan. The interface includes a navigation bar at the top with tabs for Members, Visitors, Lodge Setup, Meeting, Calendar, and Form Letter. Below this is a 'Navigation' section with 'Active' and 'Inactive' radio buttons, and a 'Show All' button. The main area displays member information: Name (Cordegan, Charles X.), Member Number (2423423233), Birth Place (Detroit, Michigan), Married (Married), Spouse (Roberta), Street (3737 Wheatley Ln), City (Bellingham, WA), ZIP (98226-8606), and phone numbers. A 'Notes' section is visible at the bottom, showing a table of membership records.

Date	Membership Year	Amount Paid	MM	PAST	ASSMT	GL Fee	D
Jan 01, 2013	2013	\$1,110.00			\$50.00	\$60.00	
May 01, 2011	2011	\$110.00			\$50.00	\$60.00	

Exhibit (1)

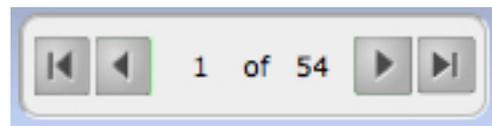
If you still do not see a member's name, select the



Button.

Doing this will show all Members and Candidates who are either Active or Inactive.

Second, you can use the Navigation buttons to browse through any 'set' of records. ("Active Members" or "Inactive Candidates are examples of 'sets' of records)



# Dues Payments:

**Member or Candidate?** Member  
 Member Number: 1233465  
 Birth Place: 2011Knoxville, TN  
 Married: Married  
 Spouse: Betty  
 Street: 122 w alamo st  
 Unit: Unit 22  
 City: Bellingham ST WA ZIP: 98225  
 Phone: (360) 333-4444 (208) 676-8554  
 Email: DaveyC@alamo.com  
 DOB: Mar 03, 1917 Age: 95  
 Dues Status: Current  
 Dues Paid Thru: 2013  
 Mem'sp Type: LIFE MEMBER  
 Active

Date	Membership Year	Amount Paid	MM	PAST	ASSMT	GL Fee	DISTR FEE	WORPHNS	Amt Due	Donation	Over/Under
LIFE MEMBER \$45.00 \$50.00 \$60.00 \$5.00 \$10.00 <b>-\$281.00</b>											
Jan 07, 2013	2013			\$45.00	\$50.00	\$60.00	\$5.00	\$10.00	\$170.00		-\$170.00
Oct 11, 2012	2012	\$170.00		\$45.00	\$50.00	\$60.00	\$5.00	\$10.00	\$170.00		
Jan 05, 2011	2011	\$333.00		\$45.00	\$50.00	\$60.00	\$5.00	\$10.00	\$170.00	\$163.00	
Jan 06, 2010	2010	\$133.00		\$45.00	\$50.00	\$38.00			\$170.00		-\$37.00
Jan 13, 2009	2009	\$133.00		\$45.00	\$50.00	\$38.00			\$170.00		-\$37.00
Feb 06, 2008	2008	\$200.00		\$45.00	\$50.00	\$60.00	\$5.00	\$10.00	\$170.00	\$30.00	
Jan 07, 2007	2007	\$133.00		\$45.00	\$50.00	\$38.00			\$170.00		-\$37.00

## Exhibit (2)

In Exhibit (2) above, when a dues date is first entered (Jan 07, 2013) Lodge Membership notes what type of Membership the member has (Life Member) and looks up the appropriate Categories from Lodge Setup and assigns the appropriate amounts for that type of Membership. The total for that type of membership is in the Amt. Due column (\$170).

Date	Membership Year	Amount Paid	MM	PAST	ASSMT	GL Fee	DISTR FEE	WORPHNS	Amt Due	Donation	Over/Under
LIFE MEMBER \$45.00 \$50.00 \$60.00 \$5.00 \$10.00 <b>-\$131.00</b>											
Jan 07, 2013	2013	\$150.00		\$45.00	\$50.00	\$55.00			\$170.00		-\$20.00

## Exhibit (3)

### Payment:

If a PARTIAL payment is made for \$150 the funds are allocated from left to right until the amount paid is fully allocated. In Exhibit (3), the first \$45 goes to PAST, the next \$50 goes to ASSMT and the balance of \$55 is allocated to GL Fee. NOTE: The allocation order is dictated by the sequence of the Category accounts you setup in Lodge Setup. If you don't like the allocation order, Lodge Setup is the place to change it.

Referencing Exhibit (2) above, notice how Jan 07, 2007 Brother Crocket made a partial payment of \$150 that is short by \$37. This amount is noted in the far right column as - \$37.00. After the payment, the Summary Over/Under field at the top of the Over/Under column is -\$131.00 ( $-\$281.00 + \$150.00 = -\$131.00$ ) and is the new total necessary to bring Brother Crocket Current.

## Over Payment:

To continue with the payments of David Crockett, let's assume that he pays \$300 on Jan 07, 2013. Initially, the payment looks like this:

Notes		Dues	Membership	Chairs	Proficiency	Committee	Awards	Concordant				
Jan 01, 2013 - Jan 01, 2014		Year: 2013	LIFE MEMBER									
			\$45.00	\$50.00	\$60.00	\$5.00	\$10.00				-\$111.00	
Date	Membership Year	Amount Paid	MM	PAST	ASSMT	GL Fee	DISTR FEE	WORPHNS	Amt Due	Donation	Over/Under	
Jan 07, 2013	2013	\$300.00		\$45.00	\$50.00	\$60.00	\$5.00	\$10.00	\$170.00	\$130.00		

Realizing that most 'over payments' are made by brothers who wish to apply the excess (\$130) as a Donation, this is what Lodge Membership does. (see above)

To 'correct' the over payment and apply it to the Over/Under account, just delete the donation amount. (see below)

Notes		Dues	Membership	Chairs	Proficiency	Committee	Awards	Concordant				
Jan 01, 2013 - Jan 01, 2014		Year: 2013	LIFE MEMBER									
			\$45.00	\$50.00	\$60.00	\$5.00	\$10.00				\$19.00	
Date	Membership Year	Amount Paid	MM	PAST	ASSMT	GL Fee	DISTR FEE	WORPHNS	Amt Due	Donation	Over/Under	
Jan 07, 2013	2013	\$300.00		\$45.00	\$50.00	\$60.00	\$5.00	\$10.00	\$170.00		\$130.00	

Notice that this puts David Crockett's account 'Over' by \$19. At this point you can choose to put \$19 back into the Donation account (which will zero the Over/Under Summary) or let it stay in Over/Under to be applied toward next years dues. Your choice. (see below)

Notes		Dues	Membership	Chairs	Proficiency	Committee	Awards	Concordant				
Jan 01, 2013 - Jan 01, 2014		Year: 2013	LIFE MEMBER									
			\$45.00	\$50.00	\$60.00	\$5.00	\$10.00					
Date	Membership Year	Amount Paid	MM	PAST	ASSMT	GL Fee	DISTR FEE	WORPHNS	Amt Due	Donation	Over/Under	
Jan 07, 2013	2013	\$300.00		\$45.00	\$50.00	\$60.00	\$5.00	\$10.00	\$170.00	\$19.00	\$111.00	

## Determining “Current” or “Late” Dues Status:

After the Amount Paid is entered, Lodge Membership calculates the Membership Status as either “Current” or “Late”. That calculation is made by answering 2 questions: a) “Is the Membership Year (2013 in the example above) equal to or greater than the Dues Membership Year entered in Lodge Setup and duplicated on the Dues Tab as ‘Year’ (2013) and b) “Is there an Over/Under Summary amount that is equal to or greater than zero. (In other words, “Is the member current in his dues payments?)

If the answer to both questions is ‘yes’ then the member is “Current”. Otherwise, if either question is ‘No’, then the member is “Late”

Member Profile: John Marian Wayne, Married, Spouse: Lois, Street: 2434 Buckaroo Road, City: Black Diamond, WA, ZIP: 98010. Membership: MASTER MASON. Dues Status: Late. Dues Paid Thru: 2013. DOB: Mar 03, 1944, Age: 68.

Date	Membership Year	Amount Paid	MM	PAST	ASSMT	GL Fee	DISTR FEE	WORPHNS	Amt Due	Donation	Over/Under
Jan 10, 2013	2013	\$175.00	\$40.00		\$50.00	\$60.00		\$10.00	\$160.00		\$15.00
Jan 11, 2012	2012	\$110.00	\$40.00		\$50.00	\$20.00			\$160.00		-\$50.00
Jan 04, 2011	2011	\$100.00	\$40.00		\$50.00	\$10.00			\$160.00		-\$60.00
Jan 05, 2010	2010	\$200.00	\$40.00		\$50.00	\$60.00		\$10.00	\$160.00		\$40.00
<b>MASTER MASON</b> \$40.00    \$50.00    \$60.00    \$10.00 <b>-\$55.00</b>											

In the example above, Brother Wayne is “Late” because while his Membership Year is equal to the Membership Year set in Lodge Setup (2013), his failure to make a full payment (Over/Under Summary is **-\$55**) means that he owes the lodge \$55. Therefore he is “Late”.

Member Profile: John Marian Wayne, Married, Spouse: Lois, Street: 2434 Buckaroo Road, City: Black Diamond, WA, ZIP: 98010. Membership: MASTER MASON. Dues Status: Late. Dues Paid Thru: 2012. DOB: Mar 03, 1944, Age: 68.

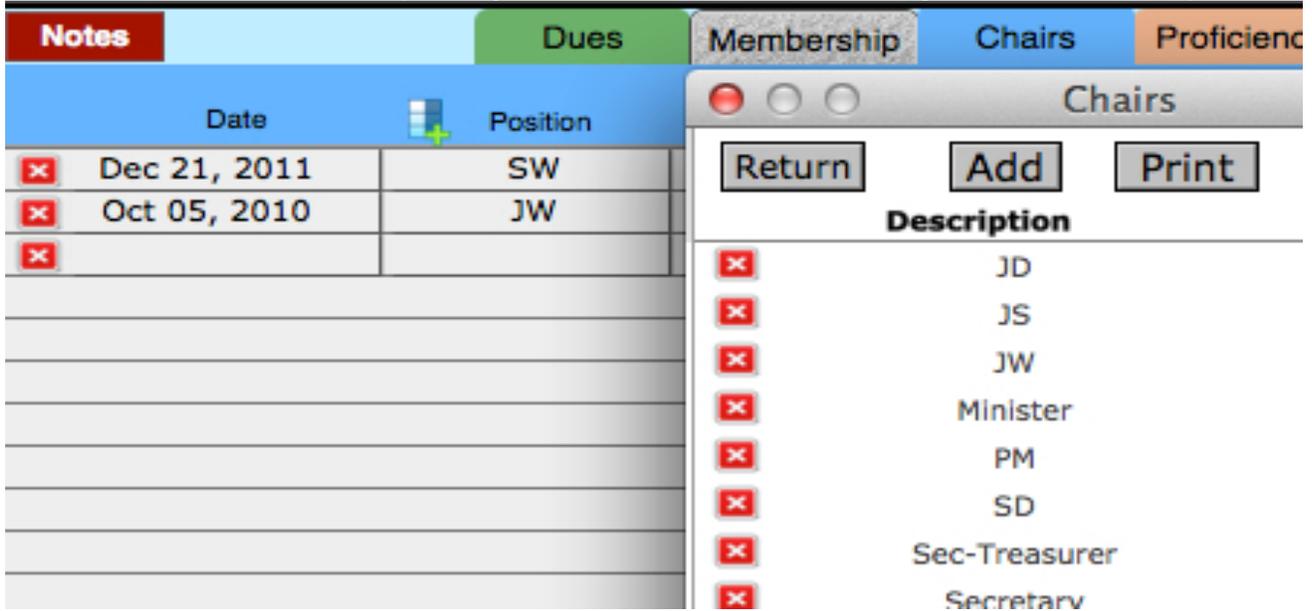
Date	Membership Year	Amount Paid	MM	PAST	ASSMT	GL Fee	DISTR FEE	WORPHNS	Amt Due	Donation	Over/Under
Jan 11, 2012	2012	\$180.00	\$40.00		\$50.00	\$60.00		\$10.00	\$160.00		\$20.00
Jan 04, 2011	2011	\$100.00	\$40.00		\$50.00	\$10.00			\$160.00		-\$60.00
Jan 05, 2010	2010	\$200.00	\$40.00		\$50.00	\$60.00		\$10.00	\$160.00		\$40.00
<b>MASTER MASON</b> \$40.00    \$50.00    \$60.00    \$10.00 <b>-\$60.00</b>											

Or, in the example above, Brother Wayne is still late because while the Over/Under Summary is zero (not showing a total), the latest Membership Year (2012) is less than the current Membership Year specified in Lodge Setup (2013).

A special' symbol:

In the Chairs, Proficiency, Committee, Awards and Concordant tabs, there is a special icon: 

In the Chairs tab, for example, if you click the 'Position' field you will see a dropdown



The screenshot shows a software interface with several tabs: Notes, Dues, Membership, Chairs, and Proficiency. The 'Chairs' tab is active. Below the tabs is a table with columns 'Date' and 'Position'. The 'Date' column has three rows with dates: 'Dec 21, 2011', 'Oct 05, 2010', and an empty row. The 'Position' column has two rows with values 'SW' and 'JW', and an empty row. To the right of the table is a dropdown menu titled 'Chairs' with buttons 'Return', 'Add', and 'Print'. Below the buttons is a list of positions with a red 'x' icon next to each: JD, JS, JW, Minister, PM, SD, Sec-Treasurer, and Secretary.

Date	Position
Dec 21, 2011	SW
Oct 05, 2010	JW

**Chairs**

Return Add Print

**Description**

- JD
- JS
- JW
- Minister
- PM
- SD
- Sec-Treasurer
- Secretary

list of the Chairs.

If you do not like the listing, you can change it by pressing the special symbol.

