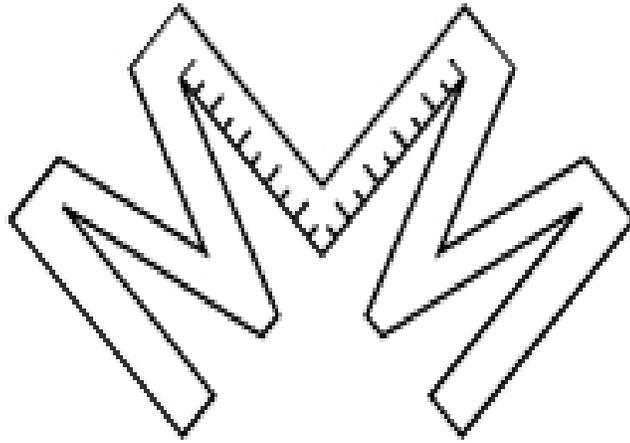


Masonic Membership Solutions



Solutions.

Quick Service Guide Membership Module

*A step-by-step user reference guide for easy
navigation through
Adding a New Membership & Editing Status in
MMS-YRIS.*

*Published August 2015
Version 3.0*

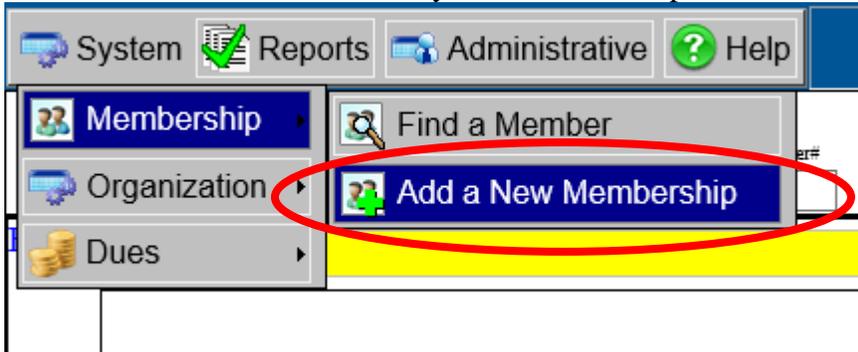


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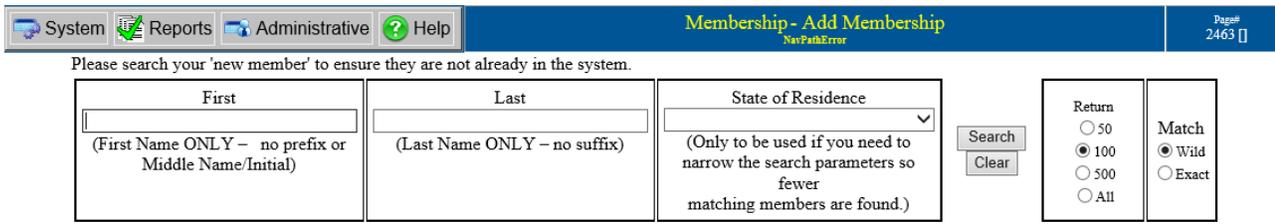
Add a Member

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.

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. Also note a space for “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.



Membership - Add 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)	State of Residence <input type="text"/> (Only to be used if you need to narrow the search parameters so fewer matching members are found.)	<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 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.

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, click on that record.

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

<input type="text" value="Robert"/> <small>(First Name ONLY – no prefix or Middle Name/Initial)</small>	<input type="text" value="Bigley"/> <small>(Last Name ONLY – no suffix)</small>	<input type="text" value="State of Residence"/> <small>(Only to be used if you need to narrow the search parameters so fewer matching members are found.)</small>	<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
--	--	--	---	---	--

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:**

Your search returned 1 people. I would like to ADD a new person and membership to the database **Use the scrollbar at the right to view all matches.**

Bigley, Robert W.	101 Regent Ct, Southlake, TX 76092-7124	Born 09/11/1948
Knights Templar	Illinois 1 - Apollo	Affiliated on 05/01/2015 Member# 1483864
Knights Templar	Illinois 15 - Sycamore	Affiliated on 05/15/2015 Member# 1483858
Knights Templar	Illinois 36 - Bethel	Knighthood on 05/07/2014 Member# 1300450
Knights Templar	Kansas 1 - Leavenworth	Affiliated on 05/07/2015 Member# 1483801
Knights Templar	Texas 106 - Park Place	Affiliated on 08/04/2014 Member# 1479858

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.

With the member below, you are appending a member and his membership to the database in the following body:

Selected person:

Bigley, Robert W. (Robert)	101 Regent Ct, Southlake, TX 76092-7124	Born 09/11/1948
Knights Templar	Illinois 1 - Apollo	Affiliated on 05/01/2015 Member# 1483864
Knights Templar	Illinois 15 - Sycamore	Affiliated on 05/15/2015 Member# 1483858
Knights Templar	Illinois 36 - Bethel	Knighthood on 05/07/2014 Member# 1300450
Knights Templar	Kansas 1 - Leavenworth	Affiliated on 05/07/2015 Member# 1483801
Knights Templar	Texas 106 - Park Place	Affiliated on 08/04/2014 Member# 1479858

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.

Return to list of matches Cancel

With the member below, you are appending a member and his membership to the database

In the following body:

National	State	Local
Knights Templar	Oklahoma	3 - Oklahoma

Select Status -
 Affiliated
 Reinstated

Continue Cancel

Person:

Bigley, Robert W. (Robert)	101 Regent Ct, Southlake, TX 76092-7124	Born 09/11/1948
Knights Templar	Illinois	1 - Apollo
Knights Templar	Illinois	15 - Sycamore
Knights Templar	Illinois	36 - Bethel
Knights Templar	Kansas	1 - Leavenworth
Knights Templar	Texas	106 - Park Place

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.

With the member below, you are appending a member and his membership to the database

In the following body:

National	State	Local
Knights Templar	Oklahoma	3 - Oklahoma

Affiliated

Use the Affiliated selection when affiliating an existing member to another body.

Caution - You are about to add new record to the system for:
Bigley, Robert W. [DOB] 09/11/1948
 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
bigley II, Rob W	01/19/1948	1483979	Reinstated	unknown, unknown, unknown 00000-, unknown
bigley, marci	01/01/1948	1483900	Affiliated	unknown, unknown, unknown 00000-, unknown
bigley, robert	01/01/1948	1483911	Candidate	unknown, unknown, unknown 00000-, unknown
bigley, robert	01/01/1949	1483981	Candidate	unknown, unknown, unknown 00000-, unknown
bigley, robert	01/01/1948	1483983	Candidate	unknown, unknown, unknown 00000-, unknown

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

Continue & Save record

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

Cancel

Person:

Bigley, Robert W. (Robert)	101 Regent Ct, Southlake, TX 76092-7124	Born 09/11/1948
Knights Templar	Illinois	1 - Apollo
Knights Templar	Illinois	15 - Sycamore
Knights Templar	Illinois	36 - Bethel
Knights Templar	Kansas	1 - Leavenworth
Knights Templar	Texas	106 - Park Place

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.

Bigley, Robert W. [DOB] 09/11/1948 [Home] 101 Regent Ct, Southlake, TX 76092-7124

National Body: Knights Templar

Current Date of Birth Listed: 09/11/1948 Change Date of Birth to: 9/11/1948

Orders	Date	State	Local	Comments
Order of the Red Cross	04/29/1972	Illinois	37 - Melita	
Order of Malta	04/29/1972	Illinois	37 - Melita	
Order of the Temple (Knighted)	05/07/2014	Illinois	37 - Melita	

Affiliated: [dropdown] Oklahoma State: 3 - Oklahoma

First Line Signer: [Select a member]

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.

This 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		Illinois	37 - Melita	
Order of Malta		Illinois	37 - Melita	
Order of the Temple		Illinois	37 - Melita	

Affiliated: [dropdown] Oklahoma State: 3 - Oklahoma

First Line Signer: [Select a member]

Save Cancel Reset

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" in the previous screen you will be taken back to the Edit Status screen, which will confirm everything has been added as you have entered it.

Bigley, Robert W. [DOB] 09/11/1948 [Home] 101 Regent Ct, Southlake, TX 76092-7124

Knights Templar

Member#	Grand Commandery	Commandery	Status	Status Date	Comment	Modified Date	Modified By
1484088	Oklahoma	3 - Oklahoma	Affiliated	6/29/2015		7/29/2015	yrial

Profile: Bigley, Robert W.; [3 - Oklahoma, Oklahoma, Knights Templar, York Rite] [Membership# 1484088]

Date of Birth: 9/11/1948
 Status: Affiliated
 Status Date: 6/29/2015
 First Line Signer: Abbott, Eric L.

If record is in Error and you need removed permanently with a Delete Adjustment - Contact System Administrator.
A dues card request has been generated. A dues card for the current year will be mailed to the mailing address of the Commandery in the next processing cycle.

Reprint dues card? Yes No

On this screen besides changing a member's status, you are allowed to change the status date and the 1st 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.

Example 2 - No Match

Because 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 <input type="text" value="Robert"/> <small>(First Name ONLY - no prefix or Middle Name/Initial)</small>	Last <input type="text" value="Bigleyted"/> <small>(Last Name ONLY - no suffix)</small>	State of Residence <input type="text" value=""/> <small>(Only to be used if you need to narrow the search parameters so fewer matching members are found.)</small>	<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
---	---	--	---	--	---

No matches were found

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

OR

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

First <input type="text" value="Robert"/> <small>(First Name ONLY - no prefix or Middle Name/Initial)</small>	Last <input type="text" value="Bigley"/> <small>(Last Name ONLY - no suffix)</small>	State of Residence <input type="text" value=""/> <small>(Only to be used if you need to narrow the search parameters so fewer matching members are found.)</small>	<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
---	--	--	---	--	---

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](#)
[Use the scrollbar at the right to view all matches](#)

Your search returned 1 people.

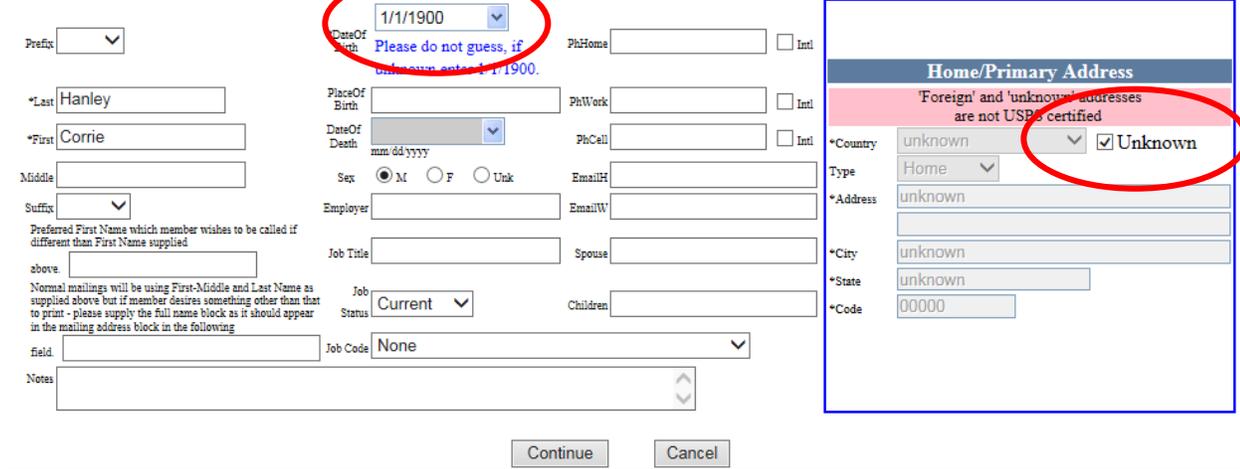
Bigley, Robert W.	101 Regent Ct, Southlake, TX 76092-7124			Born 09/11/1948
Knights Templar	Illinois	1 - Apollo	Affiliated on 05/01/2015	Member# 1483864
Knights Templar	Illinois	15 - Sycamore	Affiliated on 05/15/2015	Member# 1483858
Knights Templar	Illinois	36 - Bethel	Knighthood on 05/07/2014	Member# 1300450
Knights Templar	Kansas	1 - Leavenworth	Affiliated on 05/07/2015	Member# 1483801
Knights Templar	Texas	106 - Park Place	Affiliated on 08/04/2014	Member# 1479858

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 with 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

Normal mailings will be using First-Middle and Last Name as supplied above but if member desires something other than that to print - please supply the full name block as it should appear in the mailing address block in the following
field

Notes

DateOf Birth Please do not guess, if unknown enter 1/1/1900.

PlaceOf Birth

DateOf Death

Sex M F Unk

Employer

Job Title

Job Status

Job Code

PhHome

PhWork

PhCell

EmailH

EmailW

Spouse

Children

Home/Primary Address

Foreign and unknown addresses are not USPS certified

*Country Unknown

Type

*Address

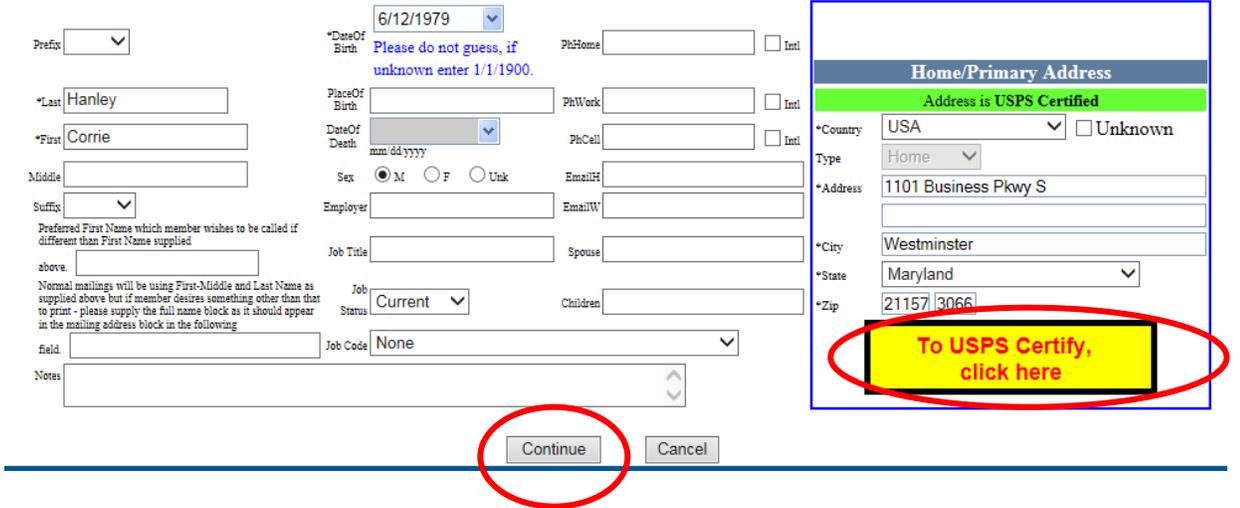
*City

*State

*Code

Continue Cancel

... 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

Normal mailings will be using First-Middle and Last Name as supplied above but if member desires something other than that to print - please supply the full name block as it should appear in the mailing address block in the following
field

Notes

DateOf Birth Please do not guess, if unknown enter 1/1/1900.

PlaceOf Birth

DateOf Death

Sex M F Unk

Employer

Job Title

Job Status

Job Code

PhHome

PhWork

PhCell

EmailH

EmailW

Spouse

Children

Home/Primary Address

Address is USPS Certified

*Country Unknown

Type

*Address

*City

*State

*Zip

To USPS Certify, click here

Continue Cancel

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

Once you have clicked “*Continue*” from the previous page 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 in 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
<div style="border: 1px solid black; padding: 2px;"> --select national body -- Cryptic Masonry Knights Templar Royal Arch Masonry </div>	<input type="text" value="▼"/>	<input type="text" value="▼"/>

Continue Cancel

Selected person:

Hanley, Corrie	1101 Business Pkwy S, Westminster, MD 21157-3066	Born 06/12/1979
----------------	--	-----------------

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.

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
Knights Templar	Maryland	17 - Carroll

Continue Cancel

-- Select Status --
 Petitioner/Candidate
 Knighted - All Orders Required
 Affiliated
 Reinstated

Person:

Hanley, Corrie	1101 Business Pkwy S, Westminster, MD 21157-3066	Born 06/12/1979
----------------	--	-----------------

Note: If you select:

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

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

“*Affiliated*”- used when a member is *Affiliating* but 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.

With the member below, you are appending a member and his membership to the database

In the following body:

National	State	Local
Knights Templar	Oklahoma	3 - Oklahoma

Affiliated

Use the Affiliated selection when affiliating an existing member to another body.

Caution - You are about to add new record to the system for:
Bigley, Robert W. [DOB] 09/11/1948

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
bigley II, Rob W	01/19/1948	1483979	Reinstated	unknown, unknown, unknown 00000-, unknown
bigley, marci	01/01/1948	1483900	Affiliated	unknown, unknown, unknown 00000-, unknown
bigley, robert	01/01/1948	1483911	Candidate	unknown, unknown, unknown 00000-, unknown
bigley, robert	01/01/1949	1483981	Candidate	unknown, unknown, unknown 00000-, unknown
bigley, robert	01/01/1948	1483983	Candidate	unknown, unknown, unknown 00000-, unknown

<p>I have double checked and none of the above Commandery Members are the same membership I am adding.</p> <p style="text-align: center; color: green; font-weight: bold;">Continue & Save record</p>	<p>I've reviewed the above. The new membership does appear to already exist in the Local Body. I will not add a membership at this time or I need to do further investigation.</p> <p style="text-align: center;">Cancel</p>
---	--

Person:

Bigley, Robert W. (Robert)	101 Regent Ct, Southlake, TX 76092-7124	Born 09/11/1948
Knights Templar	Illinois	1 - Apollo
Knights Templar	Illinois	15 - Sycamore
Knights Templar	Illinois	36 - Bethel
Knights Templar	Kansas	1 - Leavenworth
Knights Templar	Texas	106 - Park Place

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"



Because you have selected **“Petitioner/Candidate”** status option you will be taken to the Add 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)

This 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

PPH Hanley, Corrie [DOB] 06/12/1979 [Home] 1101 Business Pkwy S, Westminster, MD 21157-3066

National Body: Knights Templar

Current Date of Birth Listed: 06/12/1979 Change Date of Birth to: 6/12/1979

Date	State	Local	First Line Signer	Comments
Petitioner 4/27/2015	Marland	17 - Carroll	Select a member	
Candidate				

Please select a first line signer.

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	State	Local	Comments
Order of the Red Cross				
Order of Malta				
Order of the Temple (Knighthood)				

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

Date	State	Local	Comments
Knighthood			

First Line Signer:

Save Cancel Reset

Because you have selected **“Knighting- All 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.

This 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

Orders	Date	State	Local	Comments
Order of the Red Cross	Select a date			
Order of Malta				
Order of the Temple (Knighthd)				

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

Date	State	Local	Comments
Knighthd			

First Line Signer: Bankert, George Raymor

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 back to the Edit Status screen, which will confirm everything has been added as you have entered it.

Bigley, Robert W. [DOB] 09/11/1948 [Home] 101 Regent Ct, Southlake, TX 76092-7124

Knights Templar

Member#	Grand Commandery	Commandery	Status	Status Date	Modified Date	Modified By
1484088	Oklahoma	3 - Oklahoma	Affiliated	6/29/2015	7/29/2015	ymal

Profile: Bigley, Robert W. [DOB] 09/11/1948 [Home] 101 Regent Ct, Southlake, TX 76092-7124 [Membership# 1484088]

Date of Birth: 9/11/1948

Status: Affiliated * Status Date: 6/29/2015 First Line Signer: Abbott, Eric L.

If record is in Error and you need removed permanently with a Delete Adjustment - Contact System Administrator.
A dues card request has been generated. A dues card for the current year will be mailed to the mailing address of the Commandery in the next processing cycle.

Reprint dues card? Yes No

Comments: On this screen besides changing a member's status, you are allowed to change the status date and the 1st 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.

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)*

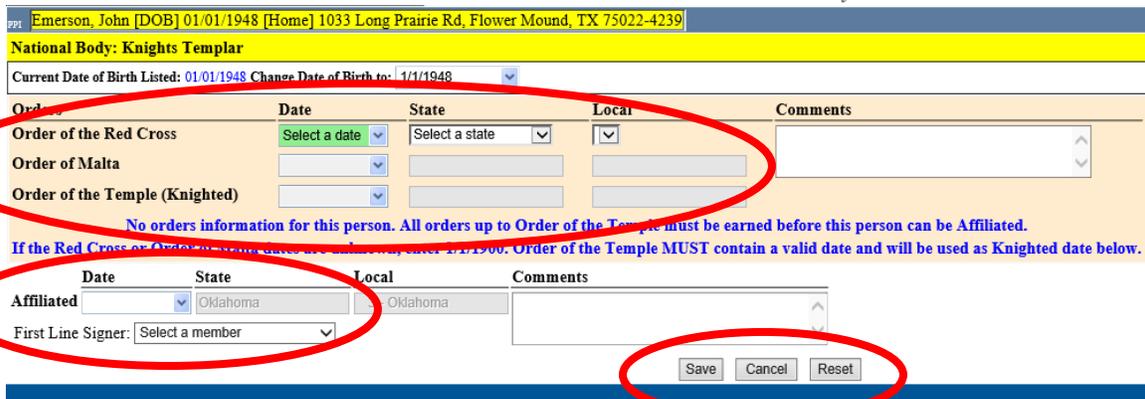
The member status that you have selected prior to this screen appears bottom left. Because this member was not originally found in the database and you have elected to add the member data as well as the membership you still must enter in the order dates and where they were taken. In this screen you have 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.

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.

This 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



Emerson, John [DOB] 01/01/1948 [Home] 1033 Long Prairie Rd, Flower Mound, TX 75022-4239

National Body: Knights Templar

Current Date of Birth Listed: 01/01/1948 Change Date of Birth to: 1/1/1948

Order	Date	State	Local	Comments
Order of the Red Cross	Select a date	Select a state		
Order of Malta				
Order of the Temple (Knighted)				

No orders information for this person. All orders up to Order of the Temple must be earned before this person can be Affiliated.
If the Red Cross or Order of Malta is entered after 1/1/1900, Order of the Temple MUST contain a valid date and will be used as Knighted date below.

Date	State	Local	Comments
Affiliated	Oklahoma	Oklahoma	

First Line Signer: Select a member

Save Cancel Reset

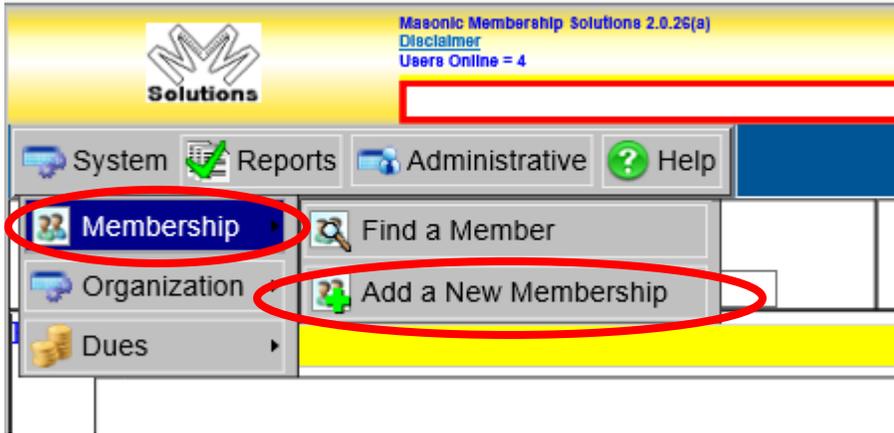
At any time prior to selecting **“Save”** you can click on **“Reset”** this will erase all your information entered but will keep you on this window, or if you select **“Cancel”** it will cancel out of everything you have done and back you out of this screen.

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

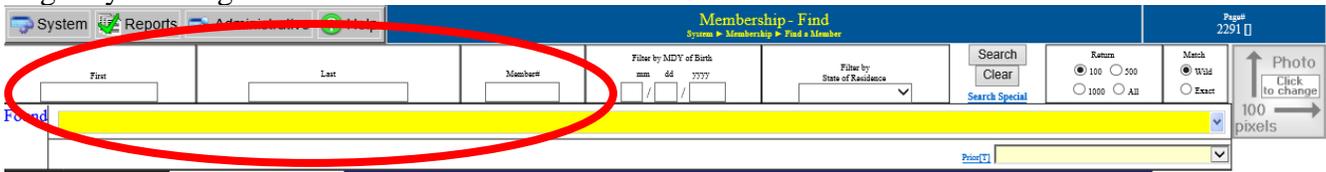


Edit Status Function

If you want to edit an existing Members Status you first must search for the record by Name or Membership Number. To Find a member begin by either clicking on the logo (top left) or click on "System then Membership" and select "Find a Member" sub menu.

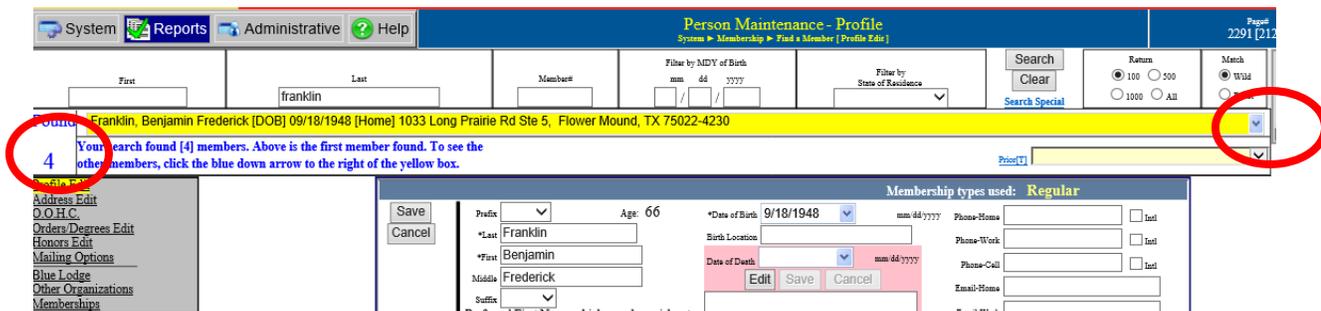


Begin by entering the members name or member number.



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, if you get too many then increase your search by adding additional characters. Also note a space for "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.

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.



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

System		Reports	Administrative	Help	Person Maintenance		
First	Last	Member#	Filter by MDY of Birth				
	franklin		mm	dd	yyyy		
Found 4 members. Above is the first member found. To see the other members, click the blue down arrow to the right of the yellow box.							
Franklin, Benjamin Frederick [DOB] 09/18/1948 [Home] 1033 Long Prairie Rd Ste 5, Flower Mound, TX 75022-4230							
Person	DOB	Home Address	City	State	Zip		
Franklin, Benjamin Frederick	9/18/1948	1033 Long Prairie Rd Ste 5	Flower Mound	TX	75022-4230		
Franklin, Lawrence R.	7/25/1927	3117 Osprey Rd	Louisville	KY	40213-1226		
Franklin, Leonard Dudley	11/21/1970	6895 Caitlin St	San Bernardino	CA	92407-19		
Franklin, Robert J.	6/12/1930	3235 Florida St	Pomona	CA	91767-10		

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.

System		Reports	Administrative	Help	Person Maintenance - Profile		
First	Last	Member#	Filter by MDY of Birth		Filter by State of Residence		
	franklin		mm	dd	yyyy		
Found 4 members. Above is the first member found. To see the other members, click the blue down arrow to the right of the yellow box.							
Franklin, Benjamin Frederick [DOB] 09/18/1948 [Home] 1033 Long Prairie Rd Ste 5, Flower Mound, TX 75022-4230							
<div style="display: flex; justify-content: space-between;"> <div style="border: 2px solid red; border-radius: 50%; padding: 5px;"> <ul style="list-style-type: none"> Profile Edit Address Edit O.O.H.C. Orders/Degrees Edit Honors Edit Mailing Options Blue Lodge Other Organizations Memberships </div> <div style="flex-grow: 1;"> <p>Membership types used: Regular</p> <p>Save Cancel</p> <p>Prefix: [v] Age: 66 *Date of Birth: 9/18/1948 mm dd yyyy Phone-Home [] last</p> <p>*Last: Franklin Birth Location: [] last</p> <p>*First: Benjamin Date of Death: [] mm dd yyyy Phone-Work [] last</p> <p>Middle: Frederick Edit Save Cancel Phone-Cell [] last</p> <p>Suffix: [v] Email-Home [] last</p> <p>Preferred First Name which member wishes to be called if different than First Name supplied above. Email-Work [] last</p> <p>Gender: <input checked="" type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Unknown</p> <p>Spouse's Name: [] last</p> <p>Children: [] last</p> <p>Job Status: Current</p> <p>Employer: [] last</p> <p>Job Title: [] last</p> <p>Job Code: None</p> <p>Notes: [] last</p> </div> </div>							

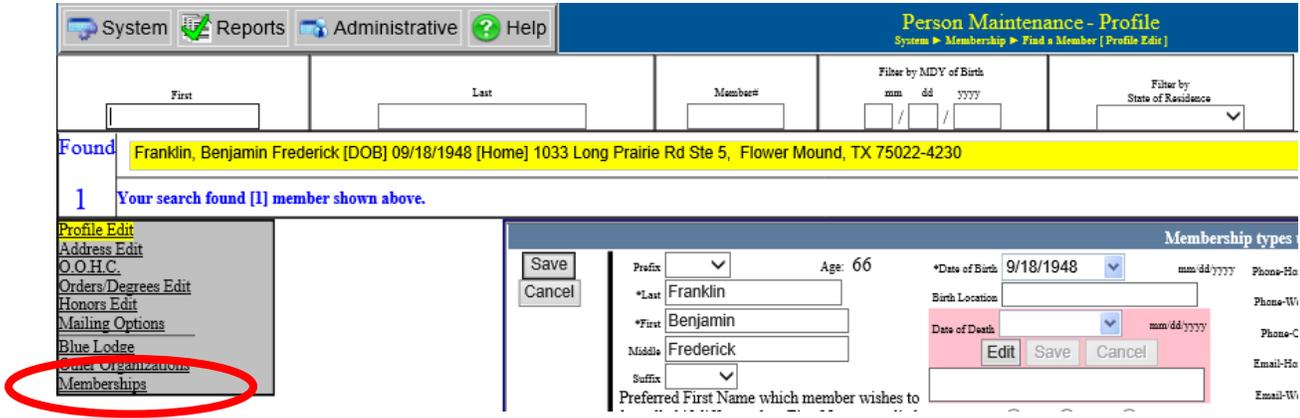
Depending on what you are wanting to do you will have two options.

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

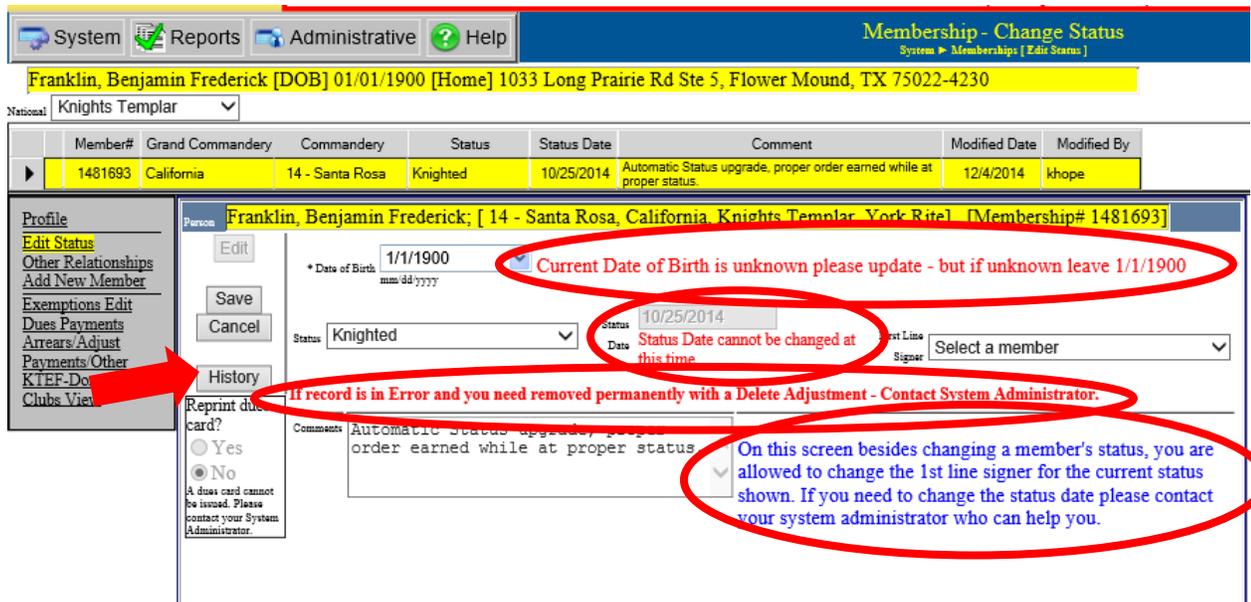
Example 2 - if the member has partial Orders/Degrees and not yet elevated to full membership and you wish to add more Orders/Degrees or he is currently at a Candidate status and you wish to add one or all of the Orders/Degrees.

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

Click on "Memberships"



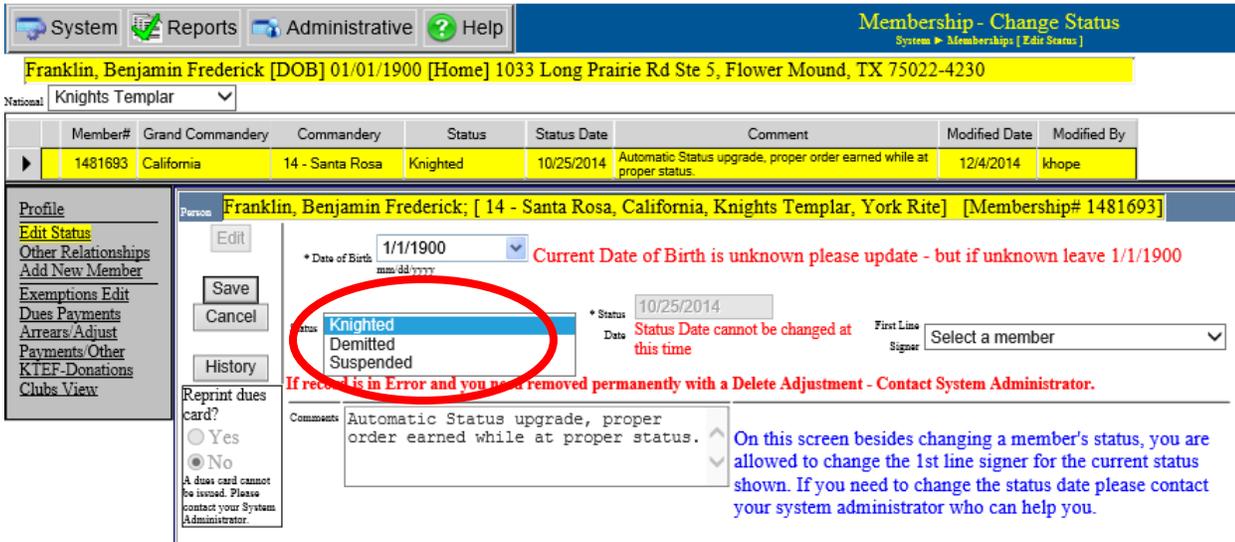
Clicking on "Memberships" will bring you to the "Edit Status" screen.



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

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

In the Status field, pull down the menu, this will provide the different statuses that are available for the members' current status. (Example shown below: current status is *Knighthood* so the other two statuses available will be *Demitted* or *Suspended*.)



Membership - Change Status
System ► Memberships [Edit Status]

Franklin, Benjamin Frederick [DOB] 01/01/1900 [Home] 1033 Long Prairie Rd Ste 5, Flower Mound, TX 75022-4230

National: Knights Templar

Member#	Grand Commandery	Commandery	Status	Status Date	Comment	Modified Date	Modified By
1481693	California	14 - Santa Rosa	Knighthood	10/25/2014	Automatic Status upgrade, proper order earned while at proper status.	12/4/2014	khope

Person: Franklin, Benjamin Frederick; [14 - Santa Rosa, California, Knights Templar, York Rite] [Membership# 1481693]

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

Status: **Knighthood** (circled in red)
Demitted
Suspended

Status Date: 10/25/2014 Status Date cannot be changed at this time

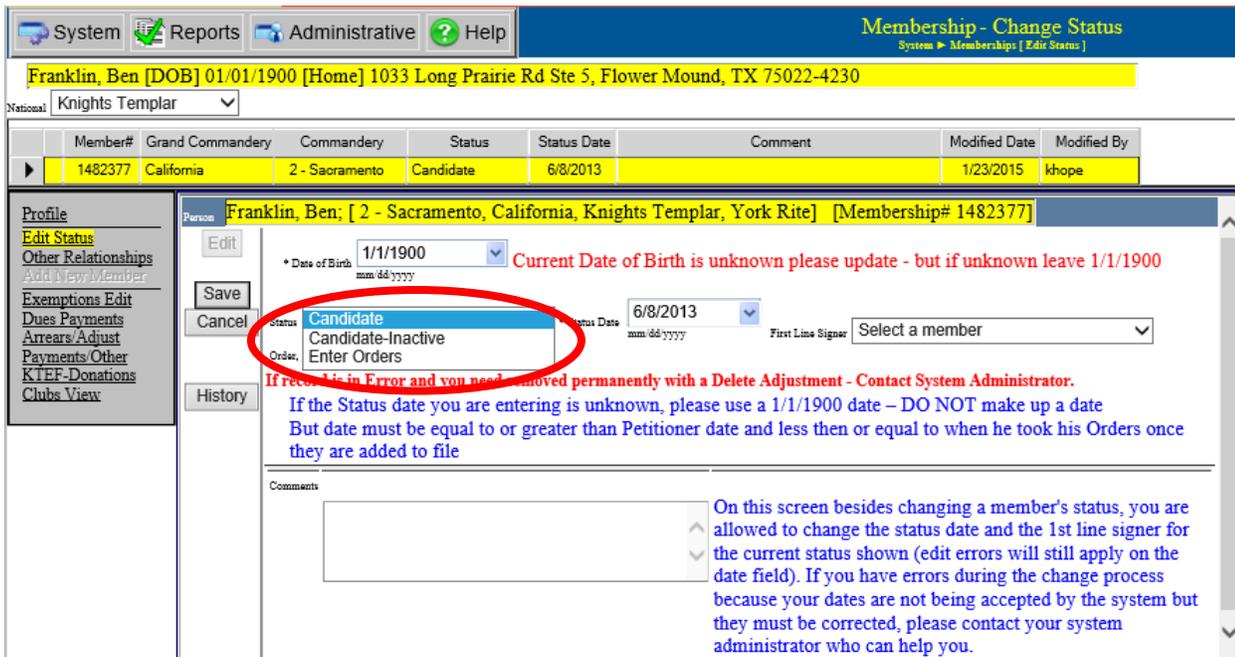
First Line Signer: Select a member

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
A dues card cannot be issued. Please contact your System Administrator.

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.



Membership - Change Status
System ► Memberships [Edit Status]

Franklin, Ben [DOB] 01/01/1900 [Home] 1033 Long Prairie Rd Ste 5, Flower Mound, TX 75022-4230

National: Knights Templar

Member#	Grand Commandery	Commandery	Status	Status Date	Comment	Modified Date	Modified By
1482377	California	2 - Sacramento	Candidate	6/8/2013		1/23/2015	khope

Person: Franklin, Ben; [2 - Sacramento, California, Knights Templar, York Rite] [Membership# 1482377]

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

Status: **Candidate** (circled in red)
Candidate-Inactive
Enter Orders

Status Date: 6/8/2013 mm dd/yyyy

First Line Signer: Select a member

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

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

Comments:

On this screen besides changing a member's status, you are allowed to change the status date and the 1st 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.

If the members' current status is "**Candidate**" you can select "**Enter Orders**" in the Status field. This will bring up the Order/Degrees screen for you to enter in the dates.

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

System Reports Administrative Help **Person Maintenance - Orders/Degrees**
System » Membership » Find a Member [Orders/Degrees]

First: Last: Member#: Filter by MDY of Birth: mm dd yyyy Filter by State of Residence: Search Clear Search Special Return: 100 500 1000 All

Found: Franklin, Ben [DOB] 01/01/1900 [Home] 1033 Long Prairie Rd Ste 5, Flower Mound, TX 75022-4230

1 Your search found [1] member shown above.

Profile Edit Address Edit O.O.H.C. **Orders/Degrees Edit** Honors Edit Mailing Options Blue Lodge Other Organizations Memberships

Orders/Degrees: Franklin, Ben

*National: Knights Templar

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

Order/Degree	State	Local	Comments
Knights Templar	California		*All*

Add Delete Save Cancel

Found: Franklin, Ben [DOB] 01/01/1900 [Home] 1033 Long Prairie Rd Ste 5, Flower Mound, TX 75022-4230

1 Your search found [1] member shown above.

Profile Edit Address Edit O.O.H.C. **Orders/Degrees Edit** Honors Edit Mailing Options Blue Lodge Other Organizations Memberships

Orders/Degrees: Franklin, Ben

*National: Knights Templar

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

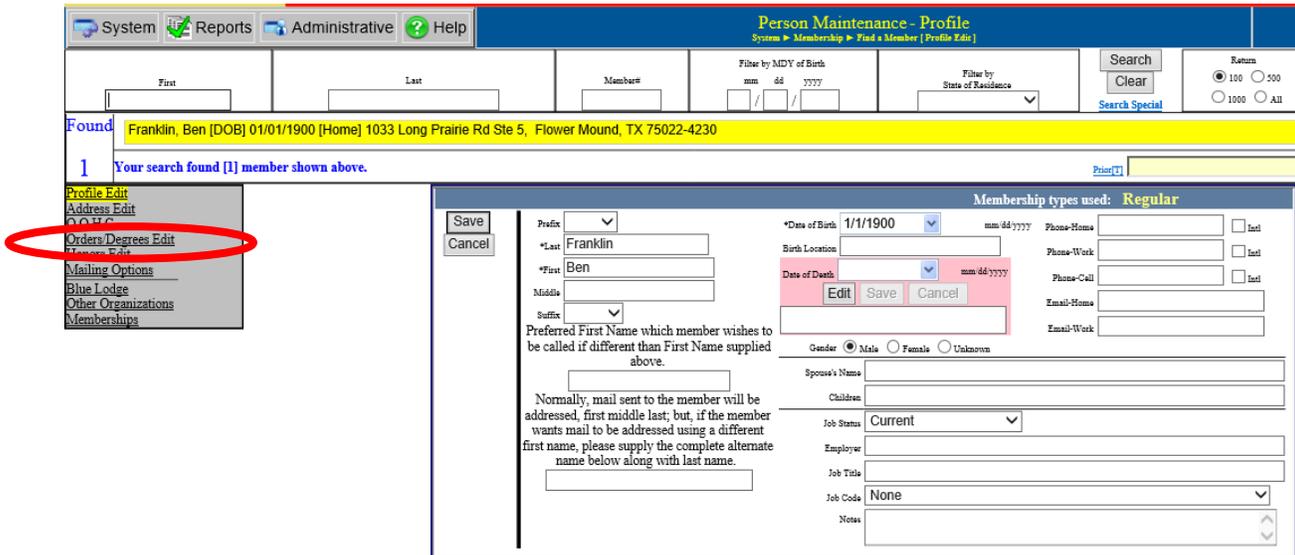
Date	Order/Degree	State	Local	Comments
	Order of the Red Cross			*** Add All Orders
	Knights Templar	California		2 - Sacramento

Add Save Cancel

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 and not yet elevated to full membership and you wish to add more Orders/Degrees or he is currently at a Candidate status you can add one or all of the Orders/Degrees.

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



Person Maintenance - Profile
System Reports Administrative Help

Search [Clear] Search Special

Found Franklin, Ben [DOB] 01/01/1900 [Home] 1033 Long Prairie Rd Ste 5, Flower Mound, TX 75022-4230

1 Your search found (1) member shown above.

Orders/Degrees Edit

Membership types used: Regular

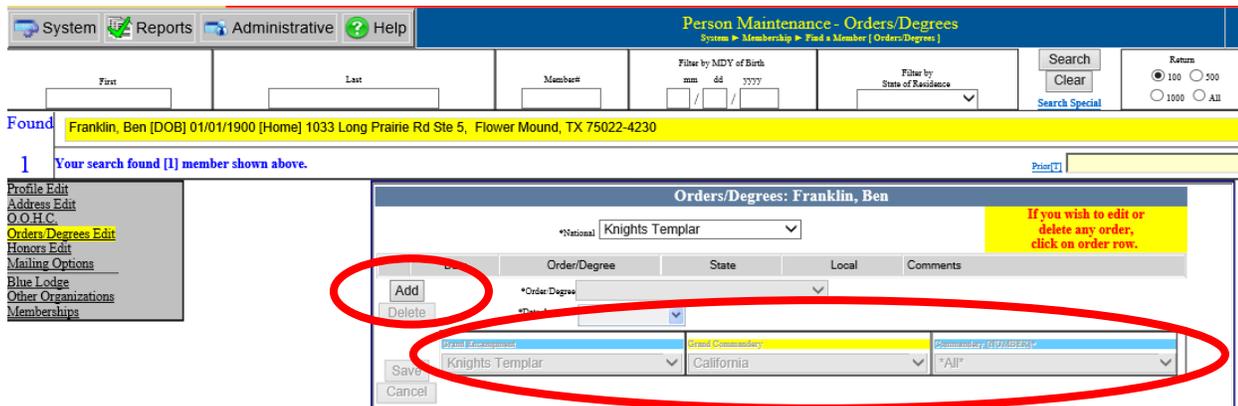
*Date of Birth: 1/1/1900

*Last: Franklin

*First: Ben

Gender: Male Female Unknown

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



Person Maintenance - Orders/Degrees
System Reports Administrative Help

Search [Clear] Search Special

Found Franklin, Ben [DOB] 01/01/1900 [Home] 1033 Long Prairie Rd Ste 5, Flower Mound, TX 75022-4230

1 Your search found (1) member shown above.

Orders/Degrees: Franklin, Ben

*National: Knights Templar

Order/Degree	State	Local	Comments
Knights Templar	California		*All*

Add **Delete**



Orders/Degrees: Franklin, Ben

*National: Knights Templar

*Order Degree: Order of the Red Cross

*Data Awarded: *** Add All Orders

Date	Order/Degree	State	Local	Comments
	Knights Templar	California		2 - Sacramento

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.