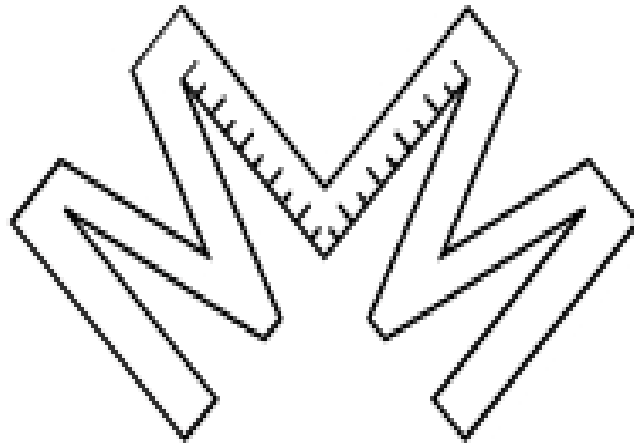


# *Masonic Membership Solutions*



**Solutions.**

## **Quick Service Guide Membership Module**

*A step-by-step user reference guide for easy  
navigation through MMS-YRIS.*

*Published August 2014  
Version 2.0.26*



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## Secure Log In



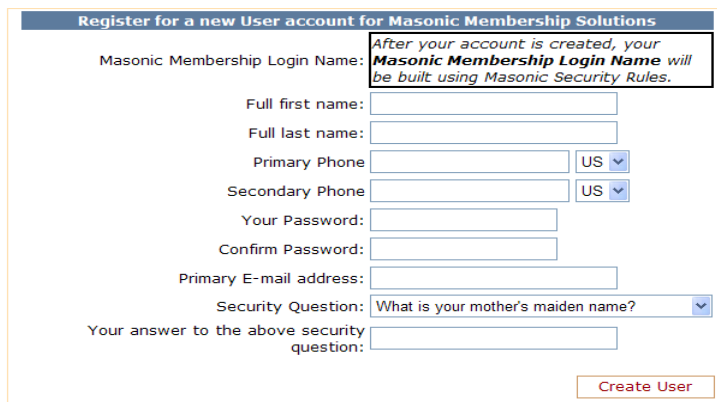
The screenshot shows the login page for Masonic Membership Solutions. At the top left is the logo and the word "Solutions". To its right is a "Login" link. The main heading is "Masonic Membership Solutions". Below this is a "Login" button. Underneath are two input fields: "User Name:" and "Password:". Below the password field is a "Log In" button. At the bottom of the login section are three links: "Register for new User Account", "Recover your forgotten Password?", and "Request Access".

The secure login page is the start of MMS.

### 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](http://www.masonic-web.com) to link to the secure login page. If you are a FIRST-TIME user, click on *Register for new User Account* and follow the step-by-step instructions.



The screenshot shows the registration form for a new user account. The title is "Register for a new User account for Masonic Membership Solutions". A note states: "After your account is created, your **Masonic Membership Login Name** will be built using Masonic Security Rules." The form includes the following fields: "Masonic Membership Login Name:" (with the note), "Full first name:", "Full last name:", "Primary Phone" (with a "US" dropdown), "Secondary Phone" (with a "US" dropdown), "Your Password:", "Confirm Password:", "Primary E-mail address:", "Security Question:" (with a dropdown menu showing "What is your mother's maiden name?"), and "Your answer to the above security question:". A "Create User" button is located at the bottom right.

After clicking on “Create” button, you will receive an email notification asking you to validate your email address.



**Complete**

Your account has been created.  
Your Masonic Membership Login Name is

**ttester**

Until your email is validated, you **WILL NOT** be allowed to login.  
To complete the Validation step, Please, check your incoming email at the below address:

**mallen@mjoservices.com**

(Note: Your Masonic Membership Login Name will also be included in your notification email.)

To validate, please click the provided URL link in your email notification.

From: support Sent: Mon 7/13/2009 3:53 PM  
 To: Michelle Allen  
 Cc:  
 Subject: Validate email for your new MMS account

## Masonic-Web.com

Hello, **ttester**.

Thank you for creating your MMS new user account. Please validate your email address by clicking on the below link:

<https://www.masonic-web.com/training/validation.aspx?ID=77f02a23-b735-47c5-a11d-b6d5cedce2c8>

After validating your email, you will be able to log into MMS.

If you have received this email in error or experience any difficulties in your initial login, please reply to this email with a brief description of your concerns.

Thank you.

After you have successfully validated your email address, you must *Request Access*.

### Verification of valid Email Address

ttester

**Thank you, your account is verified.**

You may now [Request Access](#)

Follow the instructions to complete the *Request Access* screen.



**Request Access**

To request access to a particular Masonic Membership Website and authorization to see content within that website, you must have already [Registered](#) as a new user and activated your account via email.

Your request for access will be forwarded to the appropriate Masonic Administrator who will approve or deny your request.

You will receive an email from the Administrator with their decision.

You may also come back to the bottom of this screen to see the progress of your request.

**I Request Access to ...**

Website:

National Body:

Grand Commandery:

... because:

**Since you claim to hold a Masonic Office, you must also verify your Masonic Membership**

First Name:  Member of:

Last Name:  in Grand Commandery:

Birth Date:  mm/dd/yyyy

After completing the above form, click on “Submit” button. A notification email will be sent to the appropriate System Administrator for your organization. Your System Admin contact will have to approve or disprove your request.

**Submit Request for Access**



Request Access

Access Request Submitted  
YOU ARE DONE  
Click here to end your session

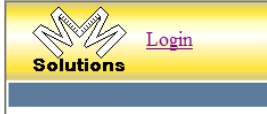
**Thank You**  
**Your request has been submitted and will be reviewed by the System Administrator. Once approved you will receive an Email with a response regarding your access request. There is no need for you this time to take any additional action.**  
**Please note that your request may take up to two business days before you receive a response.**

Hitting the above button will take user to [www.google.com](http://www.google.com)

You will receive an email notification once your System Admin contact approves or disapproves your requested access level.

From: Michelle Allen  
To: Michelle Allen  
Cc:  
Subject: Request Approved  
  
Thank you! You are all ready to log into MMs-YRIS  
  
Request: I hold the office of Grand Recorder. I request access to: All Grand Commandery - Knights Templar - York Rite

If you have been approved, you may now go to [www.masonic-web.com](http://www.masonic-web.com) and log-in to the system with full functionality.



## User Disclaimer

All first time users within the application must read and agree to the terms and conditions provided by Grand Encampment Knights Templar.

Agree  Disagree

After the initial acceptance, a Quick Reference Link to these terms and conditions will be located on the Main Header of the application for use anytime.



York Rite Information System 1.6.2.6

[Disclaimer](#)

### Disclaimer

**PLEASE READ THESE TERMS OF USE CAREFULLY BEFORE USING THE Masonic Membership Solutions (MMS) – York Rite Information System (YRIS).**

By clicking the box that states that you accept or agree to these terms, you signify your agreement to these terms of use. The System Administrator has the right to ask for re-certification of these terms at any time. If you do not agree to these terms of use, you may not use the MMS-YRIS Site.

#### Use of Data/Content

You agree that the use of the data is only as intended by the MMS-YRIS system. Each individual granted access to data holds a position of trust and must preserve the security and confidentiality of the information he/she uses or accesses. Users are required to abide by all applicable Federal and State guidelines and Masonic policies regarding confidentiality of data. Any individual with authorized access to data must not divulge this information outside except for approved Masonic business. You may not use or export or re-export any Content or any copy or adaptation of such Content, in violation of any applicable laws or regulations, including without limitation United States export laws and regulations.

#### Users Must:

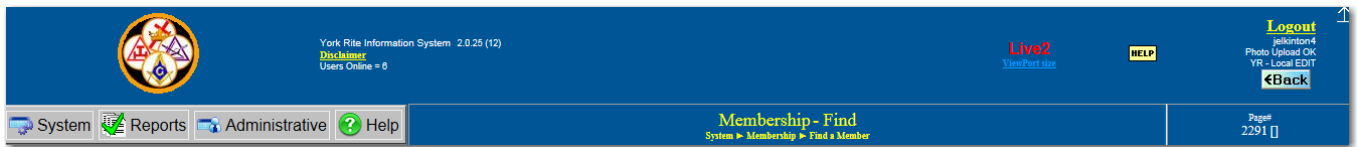
1. Access data solely in order to perform his/her responsibilities.
2. Not seek personal benefit or permit others to benefit personally or professionally from any data.
3. Not permit unauthorized use of any information.
4. Not enter, change, delete or add data to any record outside of the scope of his/her responsibilities.
5. Not include or cause to be included in any record or report, a false, inaccurate or misleading entry known to the user as such.
6. Not alter or delete or cause to be altered or deleted from any records, report or information system, a true and correct entry.
7. Not release data other than what is required in completion of his/her responsibilities.
8. Not exhibit or divulge the contents of any record or system information to any person unless it is necessary for the completion of their responsibilities.

#### Your Login and Password:

To protect the account information of our users, you are assigned a unique user name and password. These unique identifiers are disclosed only to you. You are responsible for maintaining the




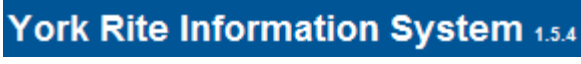

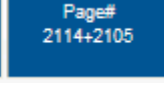
## MMS Header


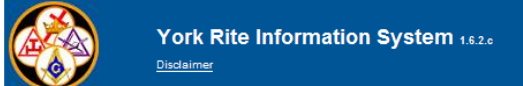
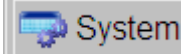
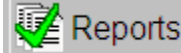
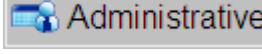
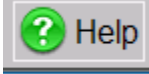


The screenshot shows the MMS Header with the following elements:

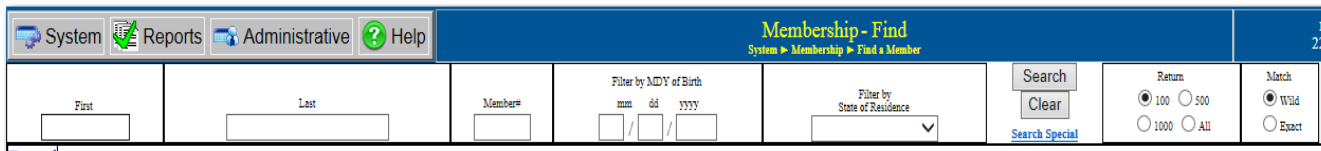
- System Information:** York Rite Information System 2.0.25 (12), Disclaimer, Users Online = 6.
- Navigation:** System, Reports, Administrative, Help.
- Current Page:** Membership - Find, System » Membership » Find a Member.
- User Information:** Logout, jefkinton4, Photo Upload OK, YR - Local EDIT, Back.
- Page Number:** Page# 2291.

### Components


-  - Quick link to **Get A Member**
-  - Title and version number
- 


Navigation information including current screen location and a Page # that should be used for reporting any system issues to your System Administrator
-  - Link used to log out of the system
-  - Link used to the User Disclaimer terms and conditions
-  - Drop down menu to access Membership, Organization, Dues, and Donations (*If permissions allow access*)
-  - Drop down menu to access Reports.
-  - Drop down menu to access User Profile, User Security (*if permissions allow access*), User Activity (*if permissions allow access*), Request for Access (*if permissions allow access*)
-  - Drop down menu to access Quick Service Guides for

## Find a Member



The **Find A Member** page is the first screen seen when logging into MMS. **Find A Member** allows a member to be searched on and edited.

To access **Find A Member**, log into MMS, pull down the System Functions menu and select Membership and the **Find A Member** sub menu or click on the  icon in the upper left corner at any time to link back

### Search options on **Find A Member**

- First Name – Members first name
- Last Name – Members last name
- Member ID – A customized, system-generated number that is assigned to each membership status record of every member
- Birth Date – Members birth date. User can search on whole date (ex. 01/24/1957) or just month or day of month
- Residence – The state the person lives in
- Match – Search by wild card. Example – Entering **Smi** in the last name field with pattern matching selected will return members with the last name of Smith, Smithson, etc. *The default search is WILD Matching*  
Search by Exact match. Example – Enter **Smith** and clicking Match Exact will only return members with a last name of Smith.
- Prior Found – the user also has the ability to select a member based on system memory. This drop down will “remember” 15 of your most recent searches.
- Search Special – the user also has the ability to search for a member based on their assigned Club #, Life Sponsor #, Patron #, or Associate Patron #.



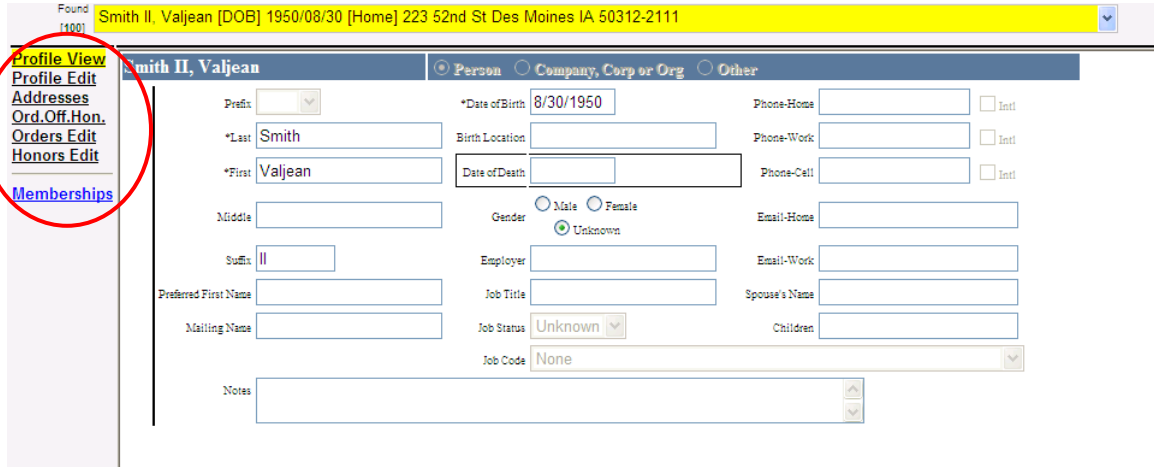
To search for a member, enter any of the search criteria and press search.

The number of results will be displayed on the left hand side of the highlighted box. To display the entire list of results, click on the down arrow icon located on the right hand side of this highlighted box. The list of results will appear showing Member Name, Birth Date, Street Address, City, State/Province and Zip code. *NOTE: Red records are deceased members.*

Person	DOB	Home Address	City	State	Zip
Tucker III, John Thomas	1972/04/17	36 Hourglass Dr	Colorado Spgs	CO	80902-2400
Tucker Jr., Burney Leland	1948/03/09	2536 Vernon Ave	Winterville	NC	28590-9543
Tucker Jr., George L.	1958/01/03	902 Cumberland St	Florence	AL	35630-3321
Tucker Jr., Herbert L.	1921/07/19	Ste 114	Bend	OR	97701-1988
Tucker Jr., James E.	1940/12/19	4 Talmer Grizzle Rd	Dahlonega	GA	30533-2449
Tucker Jr., John Thomas	1951/08/26	PO Box 1392	Gadsden	AL	35902-1392
Tucker Jr., Jules Hillard	1929/10/27	4605 E Saint Bernard Hwy	Meraux	LA	70075-2850
Tucker Jr., Mahlon G.	1929/02/28	3112 Camp Ranger Ln	Jamestown	NC	27282-8686
Tucker Jr., Melvin Wilson	1962/11/28	1007 Williamsburg Dr	Lenoir	NC	28645-8263
Tucker Jr., Ollie Shelby	1938/07/25	PO Box 1194	La Fayette	GA	30728-1194
Tucker Sr., Harold Fred	1938/05/22	88 S 1st St	Summerville	GA	30747-
Tucker Sr., James E.	1922/07/23	329 Talmer Grizzle Rd	Dahlonega	GA	30533-2452
Tucker Sr., Raymond Winfred	1924/01/20	4928 Governorwood Dr	Powell	TN	37849-4543

To further edit a member record, click on the member line in the results grid. This action will automatically link the user into the Member profile screen.

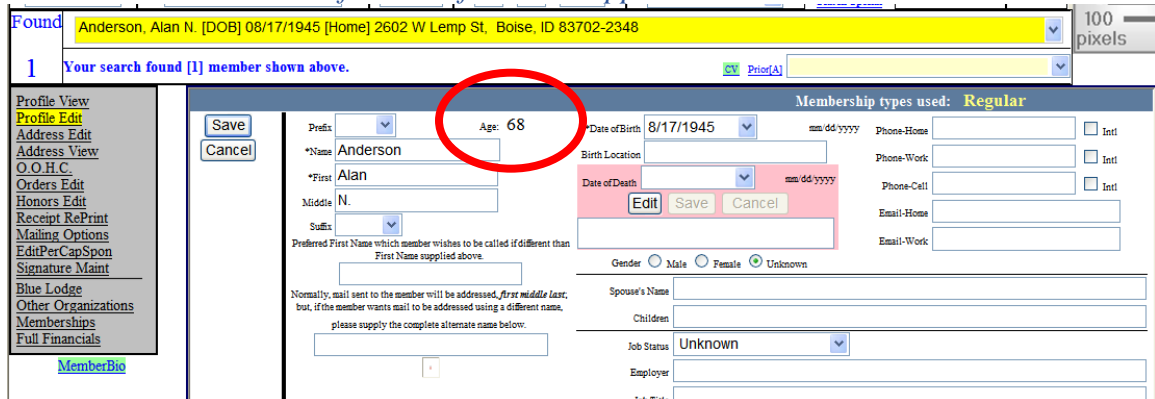
# Member Profile



## Core Functions (Left Hand Side Navigational Links)

- **Profile** – Members Full Name, Preferred First Name, Mailing Name, Birth Date, Location, Employer Information, Spouse & Children Information, and Notes

*The system calculates and displays the current age of all active (not deceased) members on their record if a date of birth is supplied in the database.*



## Address:

- Home Address – Members Home Address. *Home address is required.*
- Billing Address – Address where members would like any billing information to be sent to if different from Home Address. *This address is Optional.*



- Mailing Address – Address where members would like any Mailing correspondence to be sent if different from Home Address. **Ex. Monthly Magazine** *This address is Optional*
- Seasonal - Address where members would like any Mailing correspondence to be sent for a specified period of time. *This address is Optional*

## Address Certification in MMS

**NOTE:** All addresses in MMS must be certified with the United States Postal Service (USPS) guidelines upon initial entry. MMS uses (4) status icons to display the current USPS status of an address record in the UI. (see image below for a brief description of each of the statuses)

Type	USPS Certified	Full Address	Season Start	Season Thru	By	Updated
<b>C</b> Billing						
C Home		5015 Groveton Ln Pearland TX, 77584-1238, USA				05/25/2010
C Mailing						
C Seasonal						

[C]ertified by USPS  
  [F]ailed Certification  
  Failed but [O]verride and use anyway  
  [R]eturned undeliverable

\*Country: USA  
 Type: Billing  
 \*Address: 123 Main Street  
 \*City: Westminster  
 \*State: Maryland  
 \*Zip: 21158

When entering in a new address, fill in the appropriate address fields and then hit “Certify” button.

Edit  
 Remove  
 Mark as Returned  
**Certify**  
 Save  
 Cancel

The system will then display a message notifying the user if the address they entered is **“Certified”**, or **“Certification Failed”**. The system will also ask the user if they would like to **“Override”** the **“Certification Failed”** address status. If the user chooses to **“Override,”** this address record WILL be used system-wide for the member’s mailings and other correspondences. If they choose to NOT **“Override”**, this address record will display in the UI BUT will NOT be used for the member’s mailings and other correspondence.



To mark an address record as “Undeliverable” (mail that was returned by the post office as “bad”), the user must first select the address record in the UI. It will appear high lighted yellow once selected.

	Type	USPS Certified	Full Address	Season Start	Season Thru	By	Updated
	C Billing						
▶	C Home		5015 Groveton Ln Pearland TX, 77584-1238, USA				05/25/2010
	C Mailing						
	C Seasonal						

Then the user must select the “Mark as Returned” button.



Once this has been selected the address record for this member will still appear in the UI but WILL NOT be used for ANY mailing or other member correspondences.



Elkinton, John Charles				● [C]urrent ● [P]ast & Current			
Type	USPS Certified	Full Address	Season Start	Season Thru	By	Updated	
C Billing							
C Home	✖	5015 Groveton Ln Pearland TX, 77584-1238, USA				05/25/2010	
C Mailing							
C Seasonal							

✔ [C]ertified by USPS   
 ✖ [F]ailed Certification   
 ✖ Failed but [O]verride and use anyway   
 ✖ [R]eturned undeliverable

**NOTE:** The USPS status of each address record is crucial in the system. It will determine which address will be used for members mailing labels; annual dues cards; and monthly file exports from the GEKT office, etc.

MMS allows a user to enter an “unknown” address that is standardized in the database.

**Add A New Member screen shot**

... I will add the new person below:

Prefix:  \*DateOf Birth:  PhHome:   Intl  
 \*Last:  Birth:  PlaceOf Birth:  PhWork:   Intl  
 \*First:  DateOf Death:  mm/dd/yyyy PhCell:   Intl  
 Middle:  Sex:  M  F  Unk EmailH:   
 Suffix:  Employer:  EmailW:   
 Preferred First Name which member wishes to be called if different than First Name supplied:   
 Job Title:  Spouse:   
 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:   
 Job Status:  Job Code:   
 Notes:

**Home/Primary Address**

\*Country: USA  **Unknown**

Type: Home

\*Address:

\*City:

\*State:

\*Zip:

**Address-Edit screen shot**

Allen Jr., Adrian Garvin ● [C]urrent ● [P]ast & Current

Type	USPS Certified	Full Address	Season Start	Season Thru
C Billing				
C Home	✔	11600 Fm 3090 Rd Anderson TX, 77830-7141, USA		
C Mailing				
C Seasonal				

✔ [C]ertified by USPS   
 ✖ [F]ailed Certification   
 ✖ Failed but [O]verride and use anyway   
 ✖ [R]eturned undeliverable

Edit Remove Mark as Returned Certify Save Cancel Print Label

\*Country: USA  **Unknown**

Type: Mailing

\*Address:  County#:

County:

\*City:  DeliveryPoint:

\*State:  CheckDigit:

\*Zip:  CarrierRoute:

When a user clicks on the “Unknown” button, the system will automatically update the address line, city, State, and zip code fields to a standardized format.

**Add A New Member screen shot**

**Home/Primary Address**

*'Unknown' automatically fails USPS Address Certification*

\*Country: unknown  **Unknown**

Type: Home

\*Address: unknown

\*City: unknown

\*State: unknown

\*Code: 00000

**Address-Edit screen shot**

**Allen Jr., Adrian Garvin** [C]urrent [P]a

Type	USPS Certified	Full Address	Season Start
C Billing			
C Home	✓	11600 Fm 3090 Rd Anderson TX, 77830-7141, USA	
<b>C Mailing</b>			
C Seasonal			

[C]ertified by USPS  
  [F]ailed Certification  
  Failed but [O]verride and use anyway  
  [R]eturn

**Certification Failed**

Set as Use Anyway?  Yes  No

\*Country: unknown  **Unknown**

Type: Mailing

\*Address: unknown County#

\*City: unknown DeliveryPoint

\*State: unknown CheckDigit

\*Code: 00000 CarrierRoute





## Dymo Label Printing (LabelWriter 450 Professional model)

A user has the ability to print individual mailing labels for members within the Address-Edit Core Function located under a member's profile.

Found [1] Smith, A. Eugene [DOB] 06/07/1924 [Home] Box 662 Ten Curve F Prior Found [ ] QAL 100 pixels

Actions for above Selected Person

Profile  
 Profile View  
 Profile Edit  
**Address Edit**  
 Address View  
 O.O.H.C.  
 Orders Edit  
 Honors Edit  
 Receipt RePrint  
 Mailing Options  
 EditPerCap Spon  
 Legacy Entry  
 Memberships

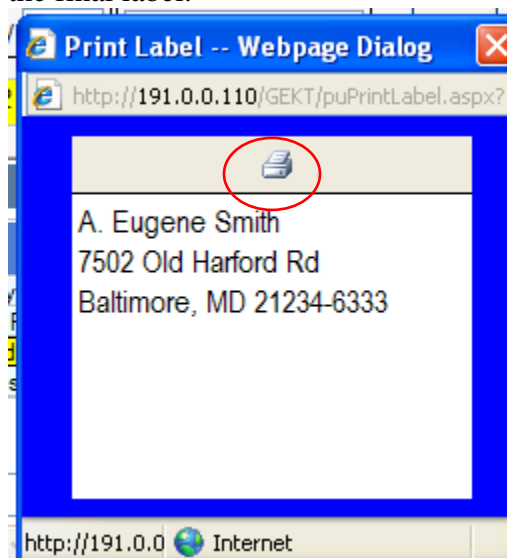
Smith, A. Eugene		[C]urrent [P]ast & Current					
Type	USPS Certified	Full Address	Season Start	Season Thru	By	Updated	
C Billing	✓	1101 Business Pkwy S Westminster MD, 21157-3066, USA			mallen	09/23/2011	
C Home	✗	Box 662 Ten Curve Rd. Gemfask MI, 49836, USA			System	01/07/2011	
C Mailing	✓	7502 Old Harford Rd Baltimore MD, 21234-6333, USA			mallen	09/23/2011	
C Seasonal	✓	123 Main Street Westminster ME, 21566, USA	01/01	05/01	mallen	09/23/2011	

[C]ertified by USPS  
  [F]ailed Certification  
  Failed but [O]verride and use anyway  
  [R]eturned undeliverable

Edit  
 Remove  
 Mark as Returned  
 Certify  
 Save  
 Cancel  
 Print Label

\*Country [ ]  
 Type [ ]  
 \*Address [ ] County# [ ]  
 [ ] County [ ]  
 \*City [ ] DeliveryPoint [ ]  
 \*State [ ] CheckDigit [ ]  
 \*Code [ ] CarrierRoute [ ]

1. Select the address type you wish to print and click the "Print Label" button.
2. Click the print icon and follow your printer's specific instructions to print the final label.



- **Orders** – shows a members order information  
There is logic for the following dates in the system: Status, Order of the Red Cross, Order of Malta, and Order of the Temple

- The dates can NOT be entered with a future date

Profile View  
Profile Edit  
Address Edit  
Address View  
O.O.H.C.  
**Orders Edit**  
Honors Edit  
Receipt RePrint  
Mailing Options  
EditPerCapSpon  
Signature Maint  
Blue Lodge  
Other Organizations  
Memberships  
Full Financials  
[MemberBio](#)

**Orders/Degrees: Goodwin, David Dixon**

\*National Knights Templar

Date	Order/Degree	National	State	Local
1/1/1900	Order of the Red Cross	Knights Templar	Colorado	41 - St Bernard
1/1/1900	Order of Malta	Knights Templar	Colorado	41 - St Bernard
1/7/1986	Order of the Temple (Knighted)	Knights Templar	New York	21 - Malta

Delete

\*Order/Degree Order of the Red Cross

\*Date Awarded mm/dd/yyyy

Save

Cancel

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

If the Order date you are entering is unknown, please use a 1/1/1900 date.

NOTE: An Order of Temple date can NOT be 1/1/1900 and must have a valid date entered.

<span style="border: 1px solid gray; padding: 2px;">National</span>	<span style="border: 1px solid gray; padding: 2px;">State</span>	<span style="border: 1px solid gray; padding: 2px;">Local</span>	<span style="border: 1px solid gray; padding: 2px;">Status</span>
---	--	--	---

- The user is unable to enter order dates out of a sequential date order. The rules are as follows:
  - Candidate Date - must be = to or > Petitioner Date
  - RedCross - must be = or > Candidate Date
  - Malta - must be = or > RedCross Date
  - Order of Temple - must be = or > Malta

**Orders/Degrees: Tillman, Robert**

\*National Knights Templar

Date	Order/Degree	National	State	Local
	<span style="border: 1px solid gray; padding: 2px;">Order of the Red Cross</span>			
	<span style="border: 1px solid gray; padding: 2px;">12/30/2012</span>			

Edit

Add

Delete

Save

Cancel

Date date occurs before Candidate status

mm/dd/yyyy

<span style="border: 1px solid gray; padding: 2px;">Grand Encampment</span>	<span style="border: 1px solid gray; padding: 2px;">Grand Commandery*</span>	<span style="border: 1px solid gray; padding: 2px;">Commandery (NUMBER)*</span>	<span style="border: 1px solid gray; padding: 2px;">Status</span>
<span style="border: 1px solid gray; padding: 2px;">Knights Templar</span>	<span style="border: 1px solid gray; padding: 2px;">Illinois</span>	<span style="border: 1px solid gray; padding: 2px;">33 - Ivanhoe</span>	<span style="border: 1px solid gray; padding: 2px;">Candidate</span>

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.

- The system allows users to enter an “unknown” date value when needed.

Petitioner status can now be entered as an “unknown” date of 1/1/1900

Organization Alabama, Knights Templar, York Rite

\*Date 1/1/1900

mm/dd/yyyy

If the Status date you are entering is unknown, please use a 1/1/1900 date.

\*Status Petitioner



Candidate status can now be entered as an “unknown” date of 1/1/1900

*Membership	<b>National</b>	<b>Grand Commandery</b>	
is in ...	Knights Templar	Alabama	4 - M
Status	Candidate	Order, giving Full Member, not yet earned	
*Date	1/1/1900		
	mm/dd/yyyy		
If the Status date you are entering is unknown, please use a 1/1/1900 date.			
Comments			

Order of the Red Cross can now be entered as an “unknown” date of 1/1/1900

#### New View

Date	Order/Degree	National	State
*Order/Degree	Order of the Red Cross		
*Date Awarded	1/1/1900		
	mm/dd/yyyy		
If the Order date you are entering is unknown, please use a 1/1/1900 date.			
NOTE: An Order of Temple date can NOT be 1/1/1900 and must have a valid date entered.			

Order of the Malta can now be entered as an “unknown” date of 1/1/1900

Date	Order/Degree	National	State
1/1/1900	Order of the Red Cross	Knights Templar	Alabama
*Order/Degree	Order of Malta		
*Date Awarded	1/1/1900		
	mm/dd/yyyy		
If the Order date you are entering is unknown, please use a 1/1/1900 date.			
NOTE: An Order of Temple date can NOT be 1/1/1900 and must have a valid date entered.			

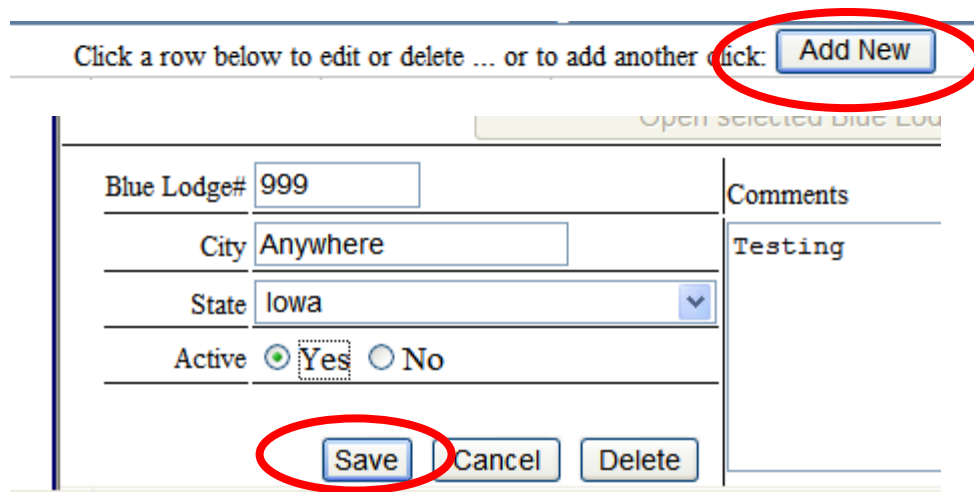
*NOTE – A member in ANY status condition (EXCEPT for “Petitioner”) may have orders added to their record.*

- **Officers** – shows the offices a member holds
- **Honors** – shows a members honor information
- **Mailing Options** – allows a user to mark a member’s record as “no solicitation” for KTEF and/or GEKT mailing initiatives (*including the monthly magazine and supplement*)
- **O.O.H.C** – shows a members honor, offices, orders, and committee information

- **Blue Lodge** – Allows users to see / manage the blue lodge information for their members



To add a new Blue Lodge record, click on the “**Add New**” button. Then add all required information: *Blue Lodge #, City, State, Active flag*. Then hit the “**Save**” button.



Click a row below to edit or delete ... or to add another click: **Add New**

Open selected Blue Lodge

Blue Lodge#

City

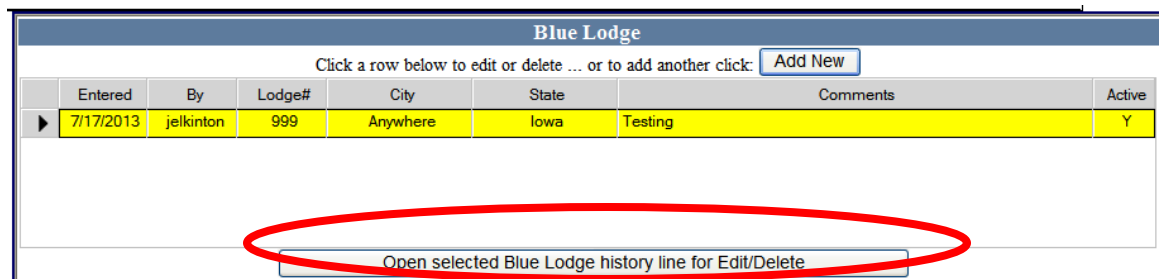
State

Active  Yes  No

Comments  
Testing

**Save** **Cancel** **Delete**

To edit a previously entered Blue Lodge record, highlight the row yellow and then click on the “**Open selected Blue Lodge history line for Edit/Delete**” button



Blue Lodge

Click a row below to edit or delete ... or to add another click: **Add New**

Entered	By	Lodge#	City	State	Comments	Active
7/17/2013	jelkinton	999	Anywhere	Iowa	Testing	Y

Open selected Blue Lodge history line for Edit/Delete



To save your edits, click on the “Save” button

Open selected Blue Lodge history line for Edit/Delete

Blue Lodge#	879	Comments
City	Anywhere	Testing EDIT
State	Idaho	
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No	
<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Delete"/>		

To add Other Masonic Affiliation data to a member’s record, go to a member’s record and click on the Other Organizations core function link on the left hand side of the screen

<a href="#">Profile View</a>
<a href="#">Profile Edit</a>
<a href="#">Address Edit</a>
<a href="#">Address View</a>
<a href="#">O.O.H.C.</a>
<a href="#">Orders Edit</a>
<a href="#">Honors Edit</a>
<a href="#">Receipt RePrint</a>
<a href="#">Mailing Options</a>
<a href="#">EditPerCapSpon</a>
<a href="#">Signature Maint</a>
<a href="#">Blue Lodge</a>
<a href="#">Other Organizations</a>
<a href="#">Memberships</a>
<a href="#">Full Financials</a>

To add a new Masonic Affiliation click on the “Add New” button

Other Masonic Organizations

Click a row below, then click ...  ... or to add a new row click:

Organization	Local Name & #	City	State	Active	Comments	Created

Then enter all pertinent information and click on the “Save” button

Organization	Royal Arch Masons	
Local Name & #	Palatine Chapter No. 206	
City	Palatine	Comments
State	Illinois	
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No	
<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Delete"/>		

To edit any components click on the word link and an editable screen will appear to the right (if permissions allow you to edit data).

To access a member’s membership information click on the Membership Core Function.

Found [100] **Smith II, Valjean [DOB] 1950/08/30 [Home] 223 52nd St Des Moines IA 50312-2111**

<a href="#">Profile View</a> <a href="#">Profile Edit</a> <a href="#">Addresses</a> <a href="#">Ord.Off.Hon.</a> <a href="#">Orders Edit</a> <a href="#">Honors Edit</a> <a href="#">Memberships</a>	<b>Smith II, Valjean</b>			<input checked="" type="radio"/> Person <input type="radio"/> Company, Corp or Org <input type="radio"/> Other		
	Prefix	*Date of Birth: 8/30/1950	Phone-Home	<input type="checkbox"/> Intl		
	*Last: Smith	Birth Location	Phone-Work	<input type="checkbox"/> Intl		
	*First: Valjean	Date of Death	Phone-Cell	<input type="checkbox"/> Intl		
	Middle	Gender: <input type="radio"/> Male <input type="radio"/> Female <input checked="" type="radio"/> Unknown	Email-Home			
	Suffix: II	Employer	Email-Work			
	Preferred First Name	Job Title	Spouse's Name			
	Mailing Name	Job Status: Unknown	Children			
		Job Code: None				
	Notes					

**Core Functions: (Left hand Side Navigational Links)**

- **View/Edit** – Allows a user to view and/or edit the current status of a member including Status Condition and/or Status Date
  - A user to change a member’s status condition when they have missing or no orders in MMS.



Wright, Ricardo R. [DOB] 11/12/1974 [Home] 2230 Bannister Ln, Aurora, IL 60504-6006

National: Knights Templar

Member#	Grand Commandery	Commandery	Status	Status Date	Comment
1459487	Illinois	22 - Aurora	Knighthood	3/5/2011	Automatic Status upgrade, proper order earned while at proper status.

Profile: View Membership, Edit Status, Other Relationships, Add New Member, Add Non Member, Delete Member, Exemptions View, Exemptions Edit, Dues Payments, Arrears/Adjust Payments/Other, KTEF-Donations, Clubs View, Clubs Edit

Person: Wright, Ricardo R. [DOB] 11/12/1974 [Home] 2230 Bannister Ln, Aurora, IL 60504-6006

Membership: National, Grand Commandery, Commandery

is in: Knights Templar, Illinois, 22 - Aurora

Status: Knighthood

\* Status Date: 3/5/2011 \* Date of Birth: 11/12/1974

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

Reprint dues card?  Yes  No

- Users are UNABLE to edit a status of a deceased member moving forward.

Mowery, John D. [DOB] 12/02/1943 [Home] 5563 Bristol Pkwy, Dublin, OH 43017-8359

National: Knights Templar

Member#	Grand Commandery	Commandery	Status	Status Date	Comment
1367394	Ohio	5 - Clinton	Demitted	12/23/2013	

Profile: View Membership, Edit Status, Other Relationships, Add New Member, Add Non Member, Delete Member, Exemptions View, Exemptions Edit, Dues Payments, Arrears/Adjust Payments/Other, KTEF-Donations, Clubs View, Clubs Edit

Person: Mowery, John D. [DOB] 12/02/1943 [Home] 5563 Bristol Pkwy, Dublin, OH 43017-8359

Member recorded as deceased on [07/11/2014]. No further status changes allowed. If assistance is needed, contact your System Administrator.

Deceased: 7/11/2014

Membership: National, Grand Commandery, Commandery

is in: Knights Templar, Ohio, 5 - Clinton

Status: Demitted

Status Reason: Certificate of Demit

\* Status Date: 12/23/2013 \* Date of Birth: 12/2/1943

Comments:

Auto Comment: Auto Comment to be appended upon Save

- The system requires a "Comment" field when the user tries to change a status condition to either "Expelled" or "Delete-Adj".

speilberg, steven [DOB] 01/02/1956 [Home] unknown, unknown, unknown 00000-, unknown

National: Knights Templar

Member#	Grand Commandery	Commandery	Status	Status Date	Comment
1479244	Kentucky	28 - Ashland	Knighthood	1/2/1974	Automatic Status upgrade, proper order earned while at proper status.

Profile: View Membership, Edit Status, Other Relationships, Add New Member, Add Non Member, Delete Member, Exemptions View, Exemptions Edit, Dues Payments, Arrears/Adjust Payments/Other, KTEF-Donations, Clubs View, Clubs Edit

Person: speilberg, steven [DOB] 01/02/1956 [Home] unknown, unknown, unknown 00000-, unknown

Membership: National, Grand Commandery, Commandery

is in: Knights Templar, Kentucky, 28 - Ashland

Status: DelAdj-Active

Reason:

\* Status Date: 7/14/2014 \* Date of Birth: 1/2/1956

Comments: \* For this status a comment is required for the reason for change in Status

Auto Comment: Auto Comment to be appended upon Save

If you see a Res-Adj status condition attached to your member; this status implies a member was marked as deceased accidentally and then resurrected by a System Administrator user.

Found: Goodwin, Bruce Bernard [DOB] 04/07/1938 [Home] 2904 Folts Dr., Chattanooga, TN 37415-6114

Your search found [2] members. Above is the first member found. To see the other members, click the blue down arrow to the right of the yellow box.

Membership types

Save Cancel

Prefix: [v]  
 \*Name: Goodwin  
 \*First: Bruce  
 Middle: Bernard  
 Suffix: [v]  
 Preferred First Name which member wishes to be called if different than First Name supplied above: [v]

\*Date of Birth: 4/7/1938 mm/dd/yyyy  
 Birth Location: [v]  
 Date of Death: 9/17/2013 mm/dd/yyyy  
 Resurrect Edit Save Cancel  
 DOD entered: 09/05/2013 By: mallen  
 Gender:  Male  Female  Unknown

Person: Goodwin, Bruce Bernard [DOB] 04/07/1938 [Home] 2904 Folts Dr., Chattanooga, TN 37415-6114

National: Knights Templar [v]

Member#	Grand Commandery	Commandery	Status	Status Date	Comment	Modified Date
1448238	Tennessee	42 - Cyrene	ResAdj	9/5/2013	Resurrect - Step 3 of 3;	9/5/2013
1405857	Tennessee	{ 28 - Cleveland}	Demitted	9/22/2009	#28 merged with #42	10/20/2009

Profile

View Membership  
 Edit Status  
 Other Relationships  
 Add New Member  
 Add Non Member  
 Delete Member  
 Exemptions View  
 Exemptions Edit  
 Dues Payments  
 Arrears/Adjust  
 Payments/Other  
 KTEF-Donations  
 Clubs View  
 Clubs Edit

Person: Goodwin, Bruce Bernard [DOB] 04/07/1938 [Home] 2904 Folts Dr., Chattanooga, TN 37415-6114

Membership is in: National Grand Commandery  
 Knights Templar Tennessee 42 - Cyrene

Status: ResAdj  
 \*Date: 9/5/2013  
 Comments: Resurrect - Step 3 of 3;

Reprint dues card?  
 Yes  No

a. Res-Adj also appears in the Annual Return report

Report - Annual Return

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

Grand Encampment: Knights Templar Grand Commandery\*: Illinois Commandery (NUMBER): 36 - Bethel

Report Format: Annual Report Detail Only - Part 1 Statistical From Date: 1/1/2013 Thru Date: 9/17/2013

Annual Report Detail Only Period Start: 01/01/2013 End: 09/17/2013 Row Count: 13

All activity is based on the modified date (when updated) that falls within requested date range

Part 1 Statistical	Active Members At Start	Knight (+)	Demit (-)	Affiliate (+)	Suspend (-)	Reinstate (+)	Expel (-)	DeAdj (-)	Died (-)	Resurrect (+)	Active Members At-End
Knights Templar	195		-1			+6			-4	+1	197
Illinois	195		-1			+6			-4	+1	197
36 - Bethel	195		-1			+6			-4	+1	197
Day, Richard R.	1300491								02/15/13		06/05/13
Edwards, Ralph	1300503								06/15/13		06/15/13
Hill Jr., John W.	1300555					06/03/13					06/15/13
Hoeckelberg, Robert J.	1300557									10/14/12	09/15/13
Hughes, David L.	1300562					06/03/13					06/15/13
Kolze, Richard Charles	1300592		05/25/13								05/25/13
Lorek, Frank Edward	1300609					06/03/13					06/15/13
Nattinger, Michael E.	1300645					05/21/13					05/21/13
Nielson, Christopher B.	1300651					06/03/13					06/16/13
Parella II, Thomas D.	1300662					06/03/13					06/16/13

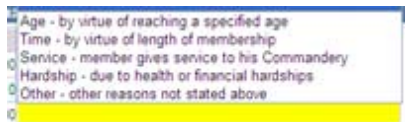




b. Res-Adj also appears in the Activity Report Based on Modified Date

Activity Report (Detailed)											Period Start: 01/01/2013	End: 09/05/2013
All activity is based on the modified date (when updated) that falls within requested date range											Modified Date	
Based on Modified date	Active Members At Start	Knight (+)	Demit (-)	Affiliate (+)	Suspend (-)	Reinstate (+)	Expel (-)	DelAdj (-)	Died (-)	Resurrect (+)	Active Members -End	
Knights Templar	70	+4	-1	+3	-6	+3				+1	72	
Tennessee	70	+4	-1	+3	-6	+3				+1	72	
42 - Cyrene	70	+4	-1	+3	-6	+3				+1	71	
Barker, William Scott	1473227					07/23/13					07/23/13	
Barker, William Scott	1473227				12/31/99						07/23/13	
Barker, William Scott	1473227	11/11/95									07/23/13	
Brown, Dennis Charles	1408083				12/31/12						01/02/13	
Cummings, Kenneth J.	1472945	07/30/13									07/31/13	
Goodwin, Bruce Bernard	1448238							09/05/13			09/05/13	
Goodwin, Bruce Bernard	1448238								09/05/13		09/05/13	
Jones, Jesse Leonard	1448241				12/31/12						11/02/13	
Lillard II, Thomas Blair	1448245		06/18/13								07/01/13	

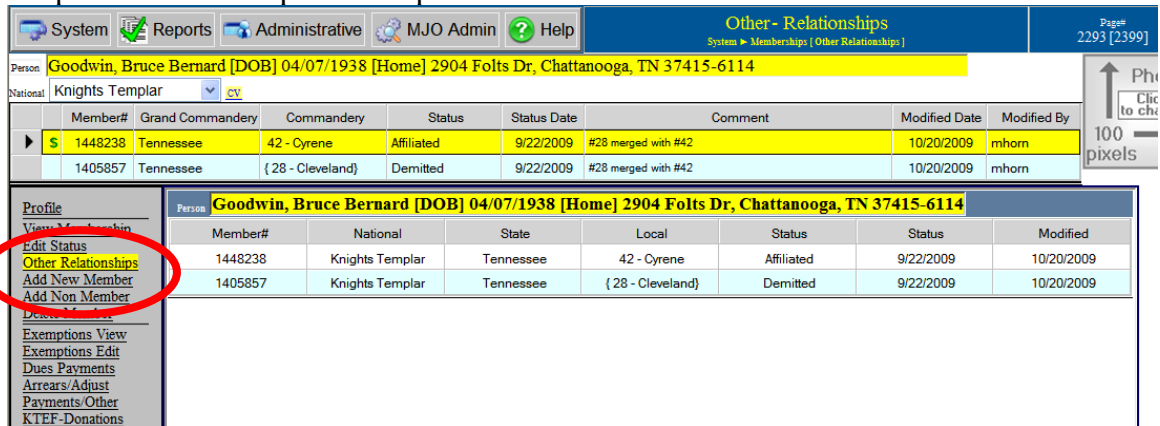
- **Add New Mem** – Allows user to add a new membership for this member
- **Delete** – Allows the user to delete the membership completely from the system
- **Exemptions** – This is the area on the screen that a local Recorder can place individual exemptions for a member's annual dues. The Grand Encampment has established 4 categories of exemptions that can be used for each line item on a dues notice:



**PLEASE NOTE: If you do NOT see this exemption grid under a member's financial record, then the Annual Dues Profile screen has not be created for that Commandery yet.**

- **Dues Payments** – This is the area on the screen that a local Recorder can view all Dues and/or Fees payments that a member has made for the specified membership. This screen will also show you the bill records that were automatically generated for dues on an annual basis based on the Commandery's Dues Cycle period. In addition, a user will use this screen to enter in Dues/Fees payments for a member. (See the *Dues/Fees Quick Service Guide* for specific instructions for applying payments)
- **Arrears / Adjust** – This is the area that allows a user to make an adjustment to the member's financial account for that specific Commandery.
- **Payments/Other** – This is the area that will display all member contributions to a Commandery cause/donation.

- **KTEF-Donations** – This is the area on the screen that displays any Knights Templar Eye Foundation contributions made by the member for this specified membership. *For example: Life Sponsors, Patrons, and Associate Patrons.*
- **Clubs** – This is the area on the screen that displays any Knights Templar Eye Foundation Grand Clubs that this member has for the specified membership.
- **Other Relationships** – This is the area on the screen that will display all plural memberships for this person in non-editable mode

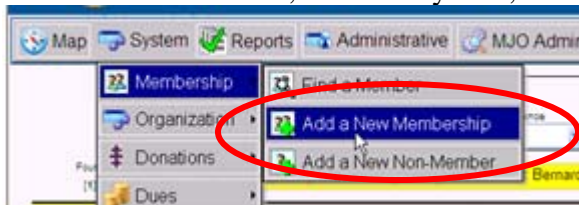


Member#	Grand Commandery	Commandery	Status	Status Date	Comment	Modified Date	Modified By
1448238	Tennessee	42 - Cyrene	Affiliated	9/22/2009	#28 merged with #42	10/20/2009	mhorn
1405857	Tennessee	{ 28 - Cleveland}	Demitted	9/22/2009	#28 merged with #42	10/20/2009	mhorn

The top section of all these screens will display all the memberships for this member (*but is permission-able by the user*). Therefore if you are a local Recorder, you will only see one membership line in this section. **PLEASE NOTE: The financial information below this section is shown for the membership line that is currently highlighted in yellow. To change the membership line you are viewing, just click on the membership you line you want and it will turn yellow and the financial information below will change accordingly.**

## Add a Member

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



User must search for the “new” member before proceeding in the system to ensure duplication of people does NOT occur. The search filters on this screen are identical with those on the Find A Member search. *However a **Last Name** is required on this search.*



Map System Reports Administrative MJO Admin **Membership - Add Membership** Page# 5020

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

First: [ ] Last: [ ] Member#: [ ] Date of Birth: [ ] Residence: [ ] Search [ ] Clear [ ]

Return:  100  500  1000  All

Match:  Wild  Exact

Found: [ ]

I would like to add a new membership to the person selected above.  I need to create a new person AND membership.

The system will display a **blue message** alerting you how many members matched the search criteria you entered. You will need to review all returned matches to determine if any of them are your "new" member.

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

First: John (First Name ONLY - no prefix / Middle Name Initial) Last: Baker (Last Name ONLY - no suffix) Filter by State of Residence: [ ] Search [ ] Clear [ ]

Return:  100  500  1000  All

Found: 15

**Baker III, John D. [DOB] 07/28/1939 [Home] 1040 S US Highway 1 Malabar FL 32950-6907**

**To see the other members, click the blue down arrow to the right of the yellow box - NOTE - this will only show the first group of records based on what you have selected as the number of records to 'Return', you may need to narrow the search parameters by using the 'Filter by State of Residence'.**

In the next screen you need to add in the remaining member information including **Address and Date Of Birth** (both mandatory).

... I will add the new person below:

\*DateOf Birth: 5/31/1988

\*Last: Tester

\*First: Test

\*DateOf Birth: [ ]

\*Address: 839 Medinah Cir

\*City: Westminster

\*State: Maryland

\*Zip: 21158 6125

**To USPS Certify, click here**

... I will add a new membership for the person above:

You will also need to add in the **Date of "Affiliation"** to your Commandery and any **"Comments"** you wish to add.

Found 45

**Edwards III, Joseph Bunyan [DOB] 10/02/1935 [Home] 1203 Regal Ln. Crownsville MD 21032-1405**

Your search found [45] members. Above is the first member found. To see the other members, click the blue down arrow to the right of the yellow box.

... I will add a new membership for the person above:

\*Membership is in: National Grand Commandery Commandery

Organization: **Knights Templar, York Rite**

\*Status: **Affiliated**

Comments: [ ]

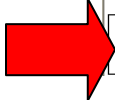
Save Cancel

If the search criteria found NO matching results, the following **blue message** will appear.

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

First Michelle	Last Allenby	Member#	Date Of Birth	Filter by State of Residence	Search Clear
-------------------	-----------------	---------	---------------	---------------------------------	-----------------

**Found 0**  
Your search found no matching members.



To create a new member (that does NOT already exist in the database) to your Commandery, select the following radio button option:

**If all the data is correct and you CAN NOT find the member currently in the database click the following:**

I would like to ADD a new membership to the database

In the next screen, you will need to add the remaining member information including **“Address”** and **“Date Of Birth”** (both mandatory).

... I will add the new person below:

*DateOf Birth: 5/31/1988 *Last: Tester *First: Test	*DateOf Birth: 5/31/1988 PlaceOf Birth DateOf Death Sex: <input checked="" type="radio"/> M <input type="radio"/> F <input type="radio"/> Unk Employer Job Title Job Status: Current Job Code: None	PhHome PhWork PhCell EmailH EmailW Spouse Children	<b>Home/Primary Address</b> Address is USPS Certified *Country: USA Type: Home *Address: 839 Medinah Cir *City: Westminster *State: Maryland ZIP: 21158 6125 <div style="border: 2px solid red; padding: 5px; display: inline-block;"> <b>To USPS Certify, click here</b> </div>
---	--	--	--

... I will add a new membership for the person above:

You will also need to add in a **Date of “Petitioner”** status and any **“Comments”** needed.

... I will add a new membership for the person above:

*Membership	Grand Encampment	Grand Commandery	Commandery [NUMBER]*
is in ...	Knights Templar	Idaho	2 - Lewiston
Organization:	2 - Lewiston, Idaho		
*Date	4/27/2014		
If the Status date you are entering is unknown, please use a 1/1/1900 date – DO NOT make up a date.			
*Status	Petitioner		
Comments			



If other members in that Commandery exist with similar names, the below warning message will appear for your final approval.

Caution - You are about to add new record to the system for:  
**Elkint, John - Born: 07/03/1980**

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

Name	Born	Membership#	Status
Elkinton, John Charles	01/24/1957	1420636	Full Member

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.

## Organization Maintenance

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

The screenshot shows the 'System' menu with 'Organization' and 'Maintenance' highlighted. The 'Commandery' section displays details for '41 - St Bernard, Colorado, Knights', including 'Commandery Current Status' with 'Active' selected and 'Charter Date' of 1/1/1900. The 'Master Edit' link in the left sidebar is circled in red.

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
  - *User also has the ability to flag a BODY as Active or Inactive*
  - *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 YRIS generated documents?  
 (Example: Dues Cards)

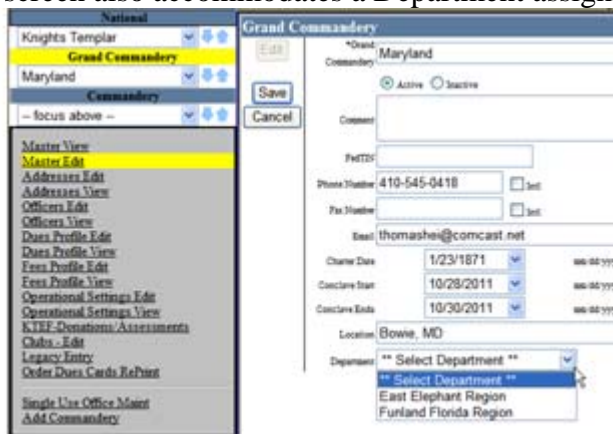
Yes, include signature if available     No, do not include signature

**Current Recorder**

Verne E. Long



This screen also accommodates a Department assignment for STATES only.



- **Address** –
  - Official - Address where the Body resides. *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)*



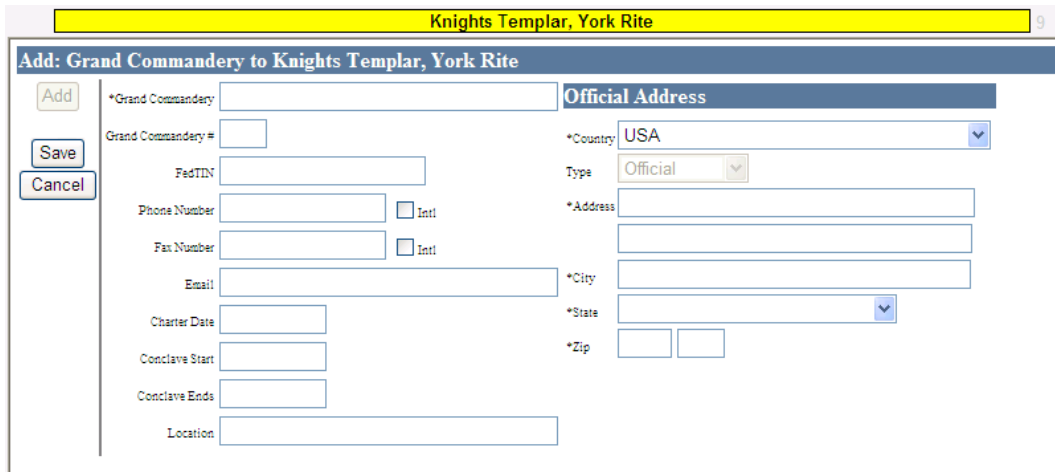


- Dues Return Address – Address where body would like all Dues correspondence to be received if different than the Official address. *This address is optional.*
- Mailing Address – Address where body would like all mailing correspondence to be received if different from the Official address. *This address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

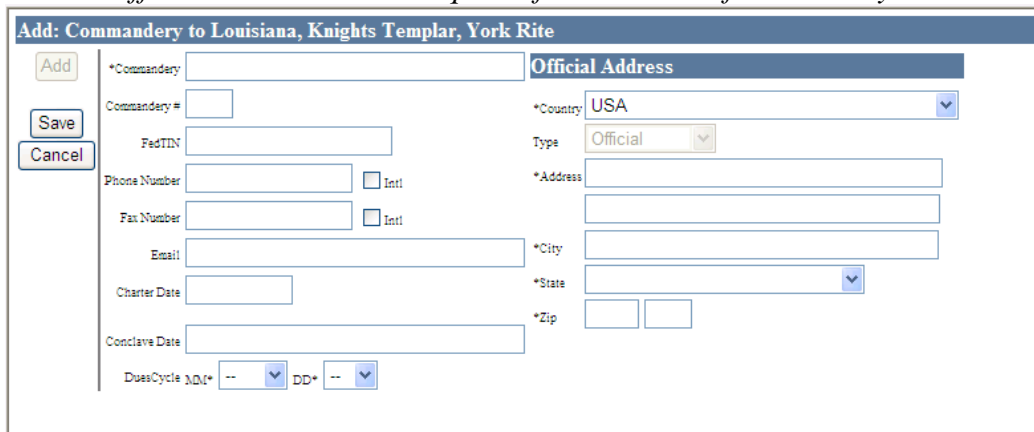
***For more on Address Certification & Dymo Label Printing in MMS please see pages 13-17 of this manual***

- Officer – Screen where the user can update (view/edit) their offices

- **Dues Profile** – Screen where user can update (view/edit) their current dues profile and all associated line items. *(Please refer to the Quick Service Guide – Dues/Fees Module for more specific navigation of this screen)*
- **Fees Profile** – Screen where users can update (view/edit) their current fees profile and all associated line items. *(Please refer to the Quick Service Guide – Dues/Fees Module for more specific navigation of this screen)*
- **Operation Settings** – Screen where users can update (view/edit) their current Dues run settings. *(Please refer to the Quick Service Guide – Dues/Fees Module for more specific navigation of this screen.)*
- **KTEF – Donations** – Screen where users can view any contributions made to the Knights Templar Eye Foundation that were disbursed to this Commandery
- **Add Grand Comm** – Screen where a user can add a new Grand Commandery to the organizational table. **NOTE:** *Grand Commandery Name, Grand Commandery #, and Official Address are required fields upon initial entry.*

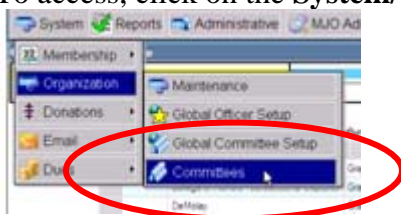


- **Add Comm** – Screen where a user can add a new Commandery to the organizational table. **NOTE:** *Commandery Name, Commandery # and Official Address are all required fields at time of initial entry.*

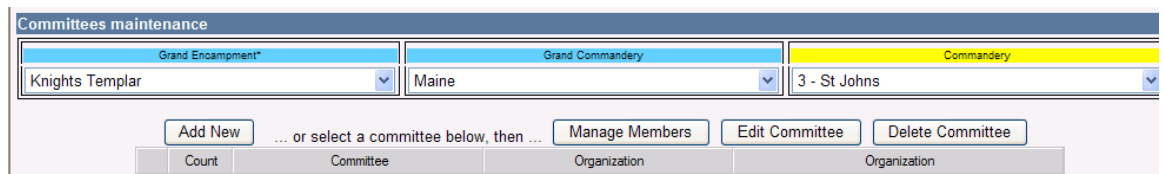


## Committees

To access, click on the **System/Organization/Committees** sub menu.



Select the appropriate level for which you wish to add a Committee. Then select **Add...** button







Enter in the Name of the Committee, Primary Contact information and any Notes necessary. Then click on the **Save** button.

**Add a new committee**

Organization exclusively associated with this committee

Grand Encampment    Grand Commandery    Commandery

Knights Templar    Maine    3 - St Johns

Committee Name: Test 123

Primary Contact

Name: Jane Doe

Phone: 445-631-2233     Intl

Email: test@testemail.com

Notes: test

Save    Cancel

Enter all roles that will be used within this committee and select the **Save Roles & Refresh** button.

**Committee's Roles**

The role [Member] is required and unchangeable. To delete a role, clear the text and save. A role in pink cannot be deleted because it's still being used.

Save Roles & Refresh

List of Committee Roles

Member
Chaimen
Secretary
Treasurer

To manage the members within a Committee, select the **Manage Members** button

Add New    ... or select a committee below, then ...    **Manage Members**    Edit Committee    Delete Committee

Count	Committee	Organization	Organization
▶	Test 123	Commandery	3 - St Johns, Maine, Knights Templar, York Rite

Search for members using any of the search criteria listed (Last name, First Name, DOB, and Place of Residence) and select **Search** button.

**Find Memberships meeting ALL of the below parameters**

First:  Last:  Member#:

Returned [2] of [2] found

Filter by MDY of Birth: mm / dd / yyyy  /  /

Filter by State of Residence:

Return:  100  500  1000  All

Match:  Wild  Exact

Grand Encampment:

Grand Commandery:

Commandery:

Last Name	First Name		
<input type="checkbox"/> Smith	Richard	[DOB] 1932/05/10 [Home] PO Box 544 Hampden ME 04444-0544	
<input type="checkbox"/>	1325107	Full Member	3 - St Johns, Maine
<input type="checkbox"/> Smith	Steven	[DOB] 1966/02/19 [Home] 44 Woodville Rd Chester ME 04457-5705	
<input type="checkbox"/>	1325108	Full Member	3 - St Johns, Maine

Select a row of the member you wish to select and click the **Add** button

Manage members associated with the below committee

Test 123 Committee exclusively for:

**Find Memberships meeting ALL of the below parameters**

First:  Last:  Member#:

Returned [2] of [2] found

Filter by MDY of Birth: mm / dd / yyyy  /  /

Filter by State of Residence:

Return:  100  500  1000  All

Match:  Wild  Exact

Grand Encampment:

Grand Commandery:

Commandery:

Last Name	First Name		
<input type="checkbox"/> Smith	Richard	[DOB] 1932/05/10 [Home] PO Box 544 Hampden ME 04444-0544	
<input checked="" type="checkbox"/>	1325107	Full Member	3 - St Johns, Maine
<input type="checkbox"/> Smith	Steven	[DOB] 1966/02/19 [Home] 44 Woodville Rd Chester ME 04457-5705	
<input type="checkbox"/>	1325108	Full Member	3 - St Johns, Maine

**Members in Committee**

Active  In-Active

Member	Member of	Role	Start	End
<input checked="" type="checkbox"/> <b>Smith, Richard L.</b>	3 - St Johns, Maine			
<input type="checkbox"/>	Member		9/1/2011	

Select the appropriate role for each member assigned to the Committee and adjust the start and stop date accordingly.

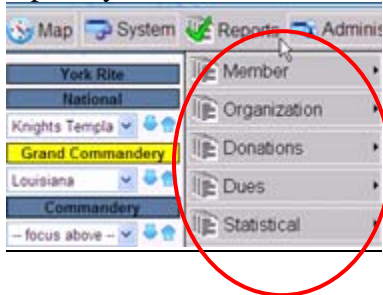
**Members in Committee**

Active  In-Active

Member	Member of	Role	Start	End
<input checked="" type="checkbox"/> Adams, Galen E.	3 - St Johns, Maine			
<input checked="" type="checkbox"/>	Member		9/1/2011	
<input checked="" type="checkbox"/> Adams, Chaimeen	3 - St Johns, Maine			
<input checked="" type="checkbox"/>	Member			
<input checked="" type="checkbox"/>	Secretary			
<input checked="" type="checkbox"/>	Treasurer		9/1/2011	
<input checked="" type="checkbox"/> Carr Jr., Edgar E.	3 - St Johns, Maine			
<input checked="" type="checkbox"/>	Role			

## Reports

To access MMS-YRIS reports, click on the **Reports** drill-down and select the category of reports you wish to run: **Member, Organizational, Donations, Dues, or Statistical.**



## Member Reports

*Member Roster*

*Member Financial Roster*

*Birthdate of Knighting Report*

*Payment Reconciliation*

*Years of Service Member Roster*

*Plural Member*

*Honors*

All these reports have the ability to run the above reports as a screen report or as mailing labels. The mailing labels are designed to print using Avery 5160 stock in your printer.



# Member Roster

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

Grand Encampment* Knights Templar	Grand Commandery Minnesota	Commandery (NUMBER) *All*	Membership Status Active	Address Type Current
USPS Certified: <input checked="" type="checkbox"/> [C]ertified <input checked="" type="checkbox"/> [F]ailed Certification <input checked="" type="checkbox"/> [O]veridden <input checked="" type="checkbox"/> [R]eturned If you have selected to add Officers please note the report may take a little longer to run.			<input checked="" type="checkbox"/> Expand All Results <input type="checkbox"/> Do you want to add Officers to this Report? (Check 1 or more)	

Run Report

Get Raw Data

5160 Labels

Include Comments

Filter by Comments

Member Roster - Parms: 106 - Park Place, Texas - Status: Active - Kind: Current - AddrCert: C F O R +Officers									
Member's Name (Last, First Middle)	Member#	Birth	Death	Status	Status	Modified	Count		
CFOR	Kind	Address	LS P AP GMC GCC	RedCross	Malta	Knights			
Work Email	Home Email	Body	Home#	Cell#	Work#				
Office:	Office:	State	Year						
Plural:	State	Commandery	LS P AP GMC GCC	Member#	Status	Status Date			
Knights Templar Texas							202		
106 - Park Place							202		
Abbe, Marion L.	1420541	12/06/1928		Affiliated	10/07/1985	10/07/1985	10/07/1985		
C Home	5102 Regal Pine Way, Friendswood, TX 77546-3016		LS	10/07/1985	10/07/1985	10/07/1985	10/07/1985		
Acton, James Albert	1420544	05/21/1920		Knights	06/06/1987	06/06/1987	06/06/1987		
C Home	801 Central Ave, Pasadena, TX 77502-3714		LS	unknown	unknown	unknown	06/06/1987		
	H=jacton@hal-pc.org		H=713-477-4393						
Adams, Dennis Donald	1420545	03/04/1941		Knights	11/20/1971	11/20/1971	11/20/1971		
C Home	PO Box 157, Jacksonville, TX 75766-0157		LS	unknown	unknown	unknown	11/20/1971		
Adams, Kenneth Oliver	1420546	04/10/1941		Knights	12/09/1972	12/09/1972	12/09/1972		
C Home	109 E Highline Dr, Deer Park, TX 77536-4117		LS	unknown	unknown	unknown	12/09/1972		
Aguirre, Alejandro	1420547	02/13/1946		Knights	06/19/1999	06/19/1999	06/19/1999		
C Home	1367 El Camino Village Dr, Houston, TX 77058-3083		LS	unknown	unknown	unknown	06/19/1999		
Andrus, John William	1420551	10/07/1934		Knights	11/19/1960	11/19/1960	11/19/1960		
C Home	2228 Via Alamitos, Palos Verdes Estates, CA 90274-1653		LS	unknown	unknown	unknown	11/19/1960		
DeLoach, Garland Moore	1420619	08/13/1937		Knights	09/20/1997	09/20/1997	09/20/1997		
C Home	4915 Rainwater Dr, Pasadena, TX 77505-2920		LS,P	unknown	unknown	unknown	09/20/1997		
Denham, Ralph Wendell	1420620	08/30/1950		Affiliated	10/06/1997	10/06/1997	10/06/1997		
C Home	1516 E Sam Houston Parkway S Apt 1208, Pasadena, TX 77503-3431		LS	unknown	unknown	unknown	unknown		
DeSimone, Ronald Anthony	1420621	01/29/1950		Knights	05/14/1994	05/14/1994	05/14/1994		
C Home	6807 Corinth Dr, Pasadena, TX 77505-3358		LS	unknown	unknown	unknown	05/14/1994		
Dodson, Brian Richard	1420623	03/03/1951		Affiliated	08/01/1994	08/01/1994	08/01/1994		
C Home	2707 Lakeside Village Dr, Missouri City, TX 77459-4348			unknown	unknown	unknown	04/30/1982		
	W=brian.dodson@wachoviasec.com	H=brdodson33@aol.com	H=281-437-1018	C=281-844-5747	W=281-340-8800				
Office:	Prelate	Texas	74 - Fort Bend	Year-2011					
	Past Commander	Texas	95 - Houston	Year-1994					
	Past Commander	Texas	74 - Fort Bend	Year-2007					
	Past Commander	Texas	74 - Fort Bend	Year-2007					
Plural-Active:	Texas	2 - Ruthven	1408516	Knights	04/30/1982				
Plural-Active:	Texas	74 - Fort Bend	LS	1418037	Affiliated	09/06/2004			
Plural-Active:	Texas	95 - Houston	LS	1419567	Affiliated	10/12/1988			
Plural-Active:	Texas	109 - Melrose		1421313	Affiliated	08/09/2003			

To utilize this report select the body you wish to pull a roster for. The user also has the ability to filter the roster by a specific Status, Address Type, Address Certification, and Status, Officer information, and Comments.



## ***Components***

- National – National Body (ex. Knights Templar)
- State – State Body (ex. Grand Commandery)
- Local – Local Body (ex. Commandery)
- Membership Status – Member’s current status. (ex. Full Member, Suspended, etc) *defaults to Active*
- Address Type – Mailing, Home, Billing, or Seasonal (*defaults to Current*)
- Offices - If user wants to Offices for members in report, they must check the box
- USPS Certified – see key structure on report for symbol definitions

To run a report using the system format structure chose the **RUN REPORT** button.

To run a report in a 5160 mailing label format, chose the **LABEL** button. *NOTE: This format will not display duplicate people if they have more than one membership within a selection.*

To run a report without the system format structure, choose the **GET RAW DATA** button. This will allow the user easier sorting ability if exported to excel.





## Payment Reconciliation Report

Report: Payment Reconciliation  
Contact, membership and financial information pertaining to all members within a specific organization.

Grand Encampment\*: **Knights Templar** Grand Commandery: **Illinois** Commandery: **\*All\*** Membership Status: **Active** Address Type: **Current** Payment Range: Start Date: **1/1/1900** End Date: **7/14/2014**

USPS Certified:  Certified  Failed Certification  Overridden  Renamed

Because this report is pulling in a lot of data it may take a little longer than normal to run.

Run Get R 5160

Payment Reconciliation Report  
Report Parameters Used: Grand Commandery: Illinois Knights Templar & [Active]&[Current] & [Certified] [Failed] [Overridden] [Returned] & 01/01/1900 - 07/14/2014 Count: 235

National + State + Local		Balance Sum		Count
Member	Member ID	Balance	Status	Status Date
Knights Templar				
Illinois				
5 - Blaney				
Bailey, James George				
C	1298097			04/21/1995
Home	205 Fenestra Ln, East Peoria, IL 61611-1104			309-694-7438
BILL - Dues Notice				
				6/6/2011
Out of State Membership				
		\$0.00		
Grand Encampment Per Capita				
		\$9.00		
Illinois Per Capita				
		\$6.70		
Member Dues				
		\$34.30		
Knights Templar Eye Foundation				
		\$0.00		
Adjustment - Member Balance Forward - 2010 dues paid				
				6/6/2011
		(\$50.00)		
Member Balance Forward				
		(\$50.00)		
Adj: 2010 dues paid				

To collapse the detail records, click on the "+" sign next to each transaction.

To utilize this report select the body you wish to pull a roster for. The user also has the ability to filter the roster by a specific Status, Address Type, Address Certification, Status, and Financial Status.

### Components

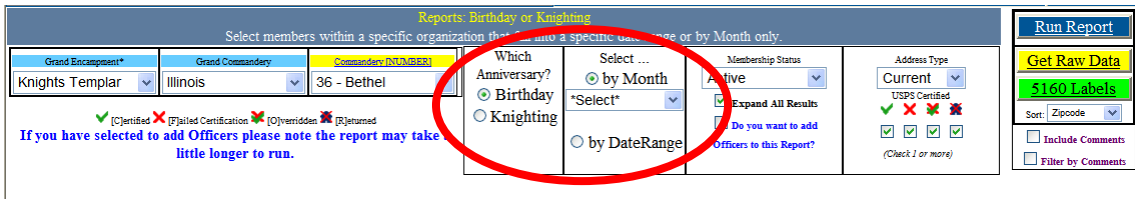
- National – National Body (ex. Knights Templar)
- State – State Body (ex. Grand Commandery)
- Local – Local Body (ex. Commandery)
- Membership Status – Member's current status. (ex. Full Member, Suspended, etc) *defaults to Active*
- Address Type – Mailing, Home, Billing, or Seasonal (*defaults to Current*)
- USPS Certified – see key structure on report for symbol definitions
- Payment Range – Date range of all payments made by the member

To run a report using the system format structure chose the **RUN REPORT** button.

To run a report in a 5160 mailing label format, chose the **LABEL** button. *NOTE: This format will not display duplicate people if they have more than one membership within a selection.*

To run a report without the system format structure, choose the **GET RAW DATA** button. This will allow the user easier sorting ability if exported to excel.

## Birthdate or Knighting Report



The report will display in the same format as the current Member Roster and all other selection criteria are the same as the Member Roster as well.

Birthday Roster - Parms: for [Mar] Active - Kind: Current - AddrCert: C F O R									
Knights Templar, State, Commandery									
Member's Name (Last, First Middle)	CFOR	Kind	Address	Member#	Birth	Death	Status	Status	Modified
Work Email				Home Email		LS P AP GMC GCC	RedCross	Malla	Knighted
Plural:	State	Commandery		LS P AP GMC GCC	Member#	Home#	Cell#	Status Date	Work#
<input type="checkbox"/> Knights Templar <input type="checkbox"/> Illinois <input checked="" type="checkbox"/> 1 - Apollo									
325									
Baker, Lee R.									
C	Home		Apt 1225, , 18170 N 91st Ave Peoria, AZ 85382-0872	1297461	03/14/1925	LS	Knighted	12/02/1978	
Beane, Gib Forest									
C	Home		1001 N Yale Ave, , Villa Park, IL 60181-1147	1297463	03/12/1928	LS,P	Affiliated	06/01/1983	
Deck, Lawrence A.									
C	Home		2310 Waterbury Cir, Aurora, IL 60504-3251	1297485	03/09/1957	LS	Knighted	05/06/1983	
Hayden, Gregory Lee									
C	Home		1s380 Edgewood Walk, West Chicago, IL 60185-4406	1472527	03/26/1958		Knighted	05/18/2013	05/29/2013
H=630-293-4177 C=630-201-3353 W=630-231-6300									
Heimke, Karl F.									
C	Home		13820 Metcalf Avenue Apt 11320, , Overland Park, KS 66223-7874	1297517	03/04/1924	LS	Knighted	07/06/1968	
Hout, William K.									
C	Home		12824 W Waverly St, Beach Park, IL 60099-9328	1297522	03/24/1931	LS	Knighted	06/04/1963	
Jordan, Terrence M.									
				1297529	03/31/1919		Affiliated	06/01/1983	

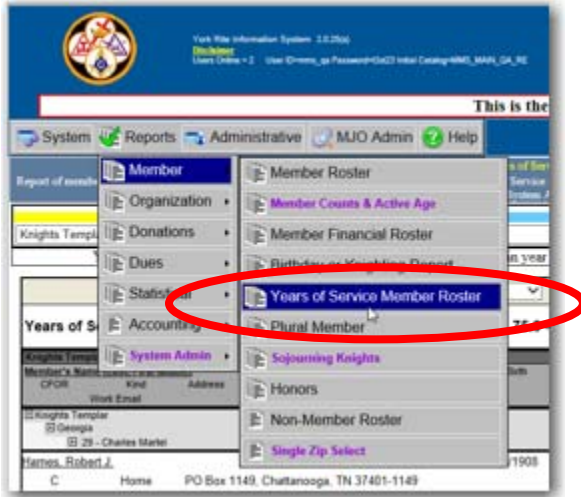
To utilize this report select the body you wish to pull a roster for. The user then must select a date range for the report. *Example. If you are looking to select all members who are turning 50 years old this year you would select **Start date: January 1, 1962** and an **End date: December 31, 1962***

### Components

- National – National Body (ex. Knights Templar)
- State – State Body (ex. Grand Commandery)
- Local – Local Body (ex. Commandery)
- Run Report – Press to Run Report based on criteria the user selected
- Export – Export report to XLS, or DOC, or PDF format

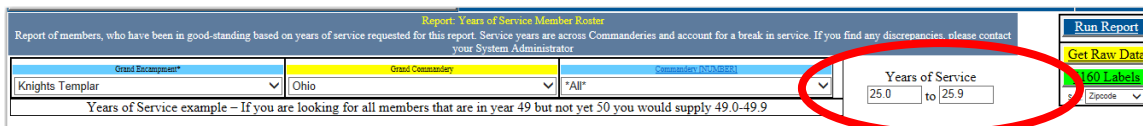


## **Years of Service Member Roster**



**NOTE:** The report name changed because the report now 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 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.

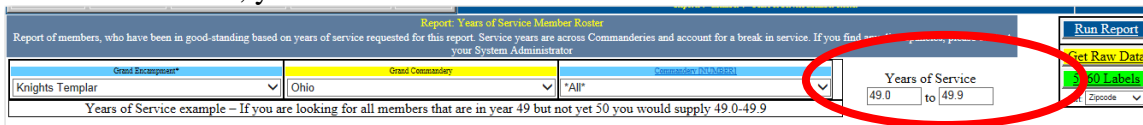


Report: Years of Service Member Roster  
 Report of members, who have been in good-standing based on years of service requested for this report. Service years are across Commanderies and account for a break in service. If you find any discrepancies, please contact your System Administrator.

Grand Encampment*	Grand Commandery	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

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 Commanderies and account for a break in service. If you find any discrepancies, please contact your System Administrator.

Grand Encampment*	Grand Commandery	Commandery NUMBER	Years of Service
Knights Templar	Ohio	All*	49.0 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

3. To see your current members who are AT (or over) 50 years of ACTIVE service, you would enter 50.0 to ANY 50.9 (or any number larger than 50.9) 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 Commanderies and account for a break in service. If you find any discrepancies, please contact your System Administrator

Grand Exempt: Knights Templar | Grand Commandery: Ohio | Commandery: All | Years of Service: 50.0 to 50.9

Buttons: Run Report, Get Raw Data, 160 Labels

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 below screen shot shows *Richard Keffer* at 50 years of ACTIVE service. Lets look at his data to support that.

Years of Service Member Roster - Params: 1 - Mt Vernon, Ohio - 51.0 - 51.9 years

Knights Templar, State, Commandery	Member's Name (Last, First Middle)	Years	Member#	Birth	Death	Status	Status Date	Knighthed Date	Count
CFOR	Kind	Address	Home Email	Home#	Cell#	Work#			
Knights Templar									3
Ohio									3
1 - Mt Vernon									3
Keffer, Richard E.			51	166360	02/21/1930	Knighthed	05/23/1963	05/23/1963	
C	Home	12604 Clark Dr, Orient, OH 43146-9164							

His Knighting Date and status effective date are both 5/23/1963

Orders/Degrees: Keffer, Richard E.

\*National: Knights Templar

Date	Order/Degree	National	State	Local
1/1/1900	Order of the Red Cross	Knights Templar	Ohio	1 - Mt Vernon
1/1/1900	Order of Malta	Knights Templar	Ohio	1 - Mt Vernon
5/23/1963	Order of the Temple (Knighthed)	Knights Templar	Ohio	1 - Mt Vernon

And he has had NO BREAK of service since that date, making him at 50 years of service

Person: Keffer, Richard E. [DOB] 02/21/1930 [Home] 12604 Clark Dr, Orient, OH 43146-9164

Past & Present Membership Status History

Effective Date	Status	Reason	Comments	Modified Date	Archived By
C 5/23/1963	Knighthed		System Upload	01/01/1900	System

**Example #2:**

The below screen shot shows *M. C. Becton* at 50 years of ACTIVE service. Lets look at his data to support that.

Member's Name (Last, First Middle)	Years	Member#	Birth	Death	Status	Status Date	Knighthed Date
Knights Templar							22
Tennessee							22
14 - Lookout							22
Beavers, Thomas Edward	53	1403529	01/13/1930		Knighthed	05/16/1961	05/16/1961
C	Home	10820 Meadowview Rd, Georgetown, TN 37606-4091					
Becton, M. C.	50	146486	09/03/1936		Affiliated	10/21/2001	09/26/1963
F	Home	2195 Grassy Cove Lane, Ooltewah, TN 37035-					
Brock, Marion C.	57	1403546	05/06/1919		Knighthed	09/22/1956	09/22/1956
C	Home	2619 Bernhurst Dr, Knoxville, TN 37918-3072					



His Knighting date and status effective date are both 9/26/1963

Orders/Degrees: Becton, M. C.					
*National: <b>Knights Templar</b>					
Date	Order/Degree	National	State	Local	
1/1/1900	Order of the Red Cross	Knights Templar	Tennessee	13 - Jackson	
1/1/1900	Order of Malta	Knights Templar	Tennessee	13 - Jackson	
9/26/1963	Order of the Temple (Knighted)	Knights Templar	Tennessee	13 - Jackson	

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

Person: Becton, M. C. [DOB] 09/03/1936 [Home] 2195 Grassy Cove Lane, Ooltewah, TN 37363-							
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: Becton, M. C. [DOB] 09/03/1936 [Home] 2195 Grassy Cove Lane, Ooltewah, TN 37363-							
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 below screen shot shows *Roy Maness* is at 50 years of ACTIVE service. Lets look at his data to support that.

Years of Service Member Roster - Parms: 36 - Lexington, Tennessee - 50.0 - 999.9 years								
Knights Templar, State, Commandery								
Member's Name (Last, First Middle)	Years	Member#	Birth	Death	Status	Status Date	Knighted Date	
CFOR	Kind	Address		Home Email	Home#	Cell#	Work#	
<input type="checkbox"/> Knights Templar <input type="checkbox"/> Tennessee <input checked="" type="checkbox"/> 36 - Lexington								
Maness, Roy	50	1417048	05/23/1928		Reinstated	01/01/1964	10/31/1958	
C	Home	16250 Highway 412 E, Lexington, TN 38326-7711						
Reed, George Lee	52	1407079	04/10/1928		Knighthood	11/30/1961	11/30/1961	
C	Home	143 New Renfroe St, Lexington, TN 38351-1351						

He was Knighted on 10/31/1958

Orders/Degrees: Maness, Roy

\*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 (Knighthood)	Knights Templar	Tennessee	36 - Lexington

Delete \*Date Awarded

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: **Maness, Roy [DOB] 05/23/1928 [Home] 16250 Highway 412 E, Lexington, TN 38351-7711**

Edit Save Cancel History

**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

\* [Current] [Past]

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 below screen shot shows *Ernest Campbell, Sr* is NOT at 50 years of ACTIVE service. Lets look at his data to support that.

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 (Knighthood)	Knights Templar	Alabama	2 - Mobile

Delete \*Date Awarded

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

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

Person: **Campbell Sr., Ernest Chester [DOB] 08/16/1923 [Home] 6237 Ga Highway 87, Macon, GA 31210-6001**

Edit Save Cancel History

**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.\*\*\*\****

**Also 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***

# Plural Member

**Report: Plural Member Roster**  
 A report consisting of all members that are active in more than one local commandery.

National:    
 State:    
 Local:    
    

of 2   
   
 Find | Next   
   

**Plural Member Report**                      *Mississippi*                      Record Count = 63

National + State + Local						
Local #	Membership #	First Name	Middle Name	Last Name	Status	Status Date
		Birth Date	Address	City	State	Zip
[-] Cryptic						
[-] Georgia						
[-] Austell						
47	345772047	Frederick	E.	McNeil	Full Member	
		04/24/1941	21 Sawmill Ln	Jonesboro	ME	04648
[-] Georgia						
2	479092002	James	C.	Ward	Suspended	12/31/1985
		07/17/1929	510 Hayden Dr	Gulfport	MS	39507
[-] Knights Templar						

To utilize this report select the body you wish to pull a roster for. This report will display all members of the specified body that also have other active memberships within the organization.

## ***Components***

- National – National Body (ex. Knights Templar)
- State – State Body (ex. Grand Commandery)
- Local – Local Body (ex. Commandery)
- Run Report – Press to Run Report based on criteria the user selected
- Export – Export report to XLS, or DOC, or PDF format



## Honors

**Report: Honors Awarded**  
A display of the honors a person has been awarded for a given membership

Grand Encampment*	Grand Commandery	Commandery	Member Status	Honors Awarded
Knights Templar	Illinois	*All*	* Active *	* All *

Run Report  
Get Raw Data  
\$160 Label  
Sort: Last Name

---

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

### Honors Roster

Member Name	Member#	City	State	Zip
Date	Honor Awarded	Awarded By		
<b>Knights Templar</b>				
<b>Illinois</b>				
<b>2 - Belvidere</b>				
<b>Brizendine, Wayne F.</b>	1297627	Alton	IL	62002-6474
12/01/1991	Knight Templar Cross of Honor	Knights Templar		
<b>3 - Peoria</b>				
<b>Carroll, Dick J.</b>	1297763	Pekin	IL	61554-5364
01/01/1900	Knight Commander of the Temple	Knights Templar		
<b>Hoffman, Howard Wayne</b>	1297823	Delavan	IL	61734-0447
07/21/2010	Knight Commander of the Temple	Knights Templar		
<b>4 - Joliet</b>				
<b>Hermann, Gary Deane</b>	1298022	Tremont	IL	61568-1044
08/05/2009	Knight Grand Cross of the Temple	Knights Templar		
<b>Peole, Jr. William H</b>	1298060	Joliet	IL	60431-8703

To utilize this report select the body you wish to pull a roster for. This report will display all members of the specified body that have the appropriate honor you have selected.

### **Components**

- National – National Body (ex. Knights Templar)
- State – State Body (ex. Grand Commandery)
- Local – Local Body (ex. Commandery)
- Member Status – Active or All
- Honor Awarded – ALL, KCT, KGC, or KTCH
- Run Report – Press to Run Report based on criteria the user selected
- Export – Export report to XLS, or DOC, or PDF format

## **Organizational Reports**

*Voting Delegates*

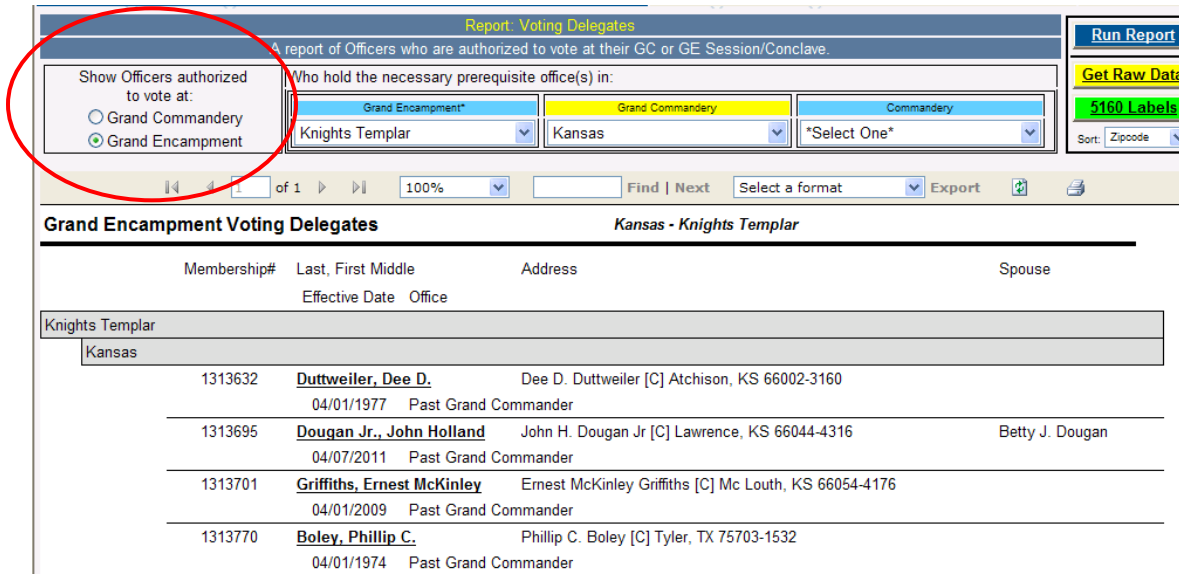
*Organization Roster*

*Officer Roster*

*Committee Roster*

*Department Roster*

## Voting Delegates



**Report: Voting Delegates**  
 A report of Officers who are authorized to vote at their GC or GE Session/Conclave.

Show Officers authorized to vote at:  
 Grand Commandery  
 Grand Encampment

Who hold the necessary prerequisite office(s) in:  
 Grand Encampment\*    Grand Commandery    Commandery  
 Knights Templar    Kansas    \*Select One\*

Run Report  
 Get Raw Data  
 5160 Labels  
 Sort: Zipcode

of 1    100%    Find | Next    Select a format    Export

**Grand Encampment Voting Delegates**      *Kansas - Knights Templar*

Membership#	Last, First Middle	Address	Spouse
	Effective Date	Office	
Knights Templar			
Kansas			
1313632	<u>Duttweiler, Dee D.</u>	Dee D. Duttweiler [C] Atchison, KS 66002-3160	
	04/01/1977	Past Grand Commander	
1313695	<u>Dougan Jr., John Holland</u>	John H. Dougan Jr [C] Lawrence, KS 66044-4316	Betty J. Dougan
	04/07/2011	Past Grand Commander	
1313701	<u>Griffiths, Ernest McKinley</u>	Ernest McKinley Griffiths [C] Mc Louth, KS 66054-4176	
	04/01/2009	Past Grand Commander	
1313770	<u>Boley, Phillip C.</u>	Phillip C. Boley [C] Tyler, TX 75703-1532	
	04/01/1974	Past Grand Commander	

To utilize this report select the body you wish to pull a roster for. Then select the radio button to control which Voting Delegates you wish to see: *Grand Encampment* or *Grand Commandery*. This report will automatically sort the results within each State level first.

### **Components**

- National – National Body (ex. Knights Templar)
- State – State Body (ex. Grand Commandery)
- Run Report – Press to Run Report based on criteria the user selected
- Export – Export report to XLS, or DOC, or PDF format





# Organization Roster

Organization Roster							Count = 9		
Knights Templar, State, Commandery									
Phone	Fax	Email	Charter	Conclave		Count			
Kind	*CFOR	Address			Department				
<input checked="" type="checkbox"/> Knights Templar									
<input checked="" type="checkbox"/> Connecticut									
<input checked="" type="checkbox"/> GRAND COMMANDERY									
860-635-6566		vincent.cowie@snet.net	09/13/1827	04/09/2011					
Official	C	1 Inverness Sq Middletown, CT 06457-1627							
Dues Return	C	1 Inverness Sq Middletown, CT 06457-1627							
Fed Ex/UPS Shipping	C	Vincent A. Cowie, Grand Recorder 1 Inverness Sq Middletown, CT 06457-1627							
Mailing	C	Vincent A. Cowie, Grand Recorder 1 Inverness Sq Middletown, CT 06457-1627							
Grand Commander		Mackey, William A.							
Home	C	29 Randal Ave, West Hartford, CT 06110-1744							
W=wmackey@advadh.com		H=will_mackey@yahoo.com	H=860-713-3243	C=860-713-3243	W=860-953-4100				
Grand Recorder		Cowie, Vincent A							
Home	C	1 Inverness Sq, Middletown, CT 06457-1627							
		H=vincent.cowie@snet.net	H=860-635-6566	C=860-655-5654	W=203-514-4326				
<input checked="" type="checkbox"/> 1 - Washington									
860-688-8799		cbfowler525@gmail.com	05/01/1819	1st & 3rd Tuesdays except Jul & Aug; also Good Friday					
Official	C	784 Main St East Hartford. CT 06108-3116							

To utilize this report select the body you wish to pull a roster for. This report will automatically sort the results within each State level (first) and then sorts to the local level.

## Components

- National – National Body (ex. Knights Templar)
- State – State Body (ex. Grand Commandery)
- Local – Local Body (ex. Commandery)
- Run Report – Press to Run Report based on criteria the user selected
- Export – Export report to XLS, or DOC, or PDF format
- Show Head & Recorder for each body - Will display the Grand Recorder / Recorder & Grand Commander / Commander for each body
- Hide Commanderies? - Can only be used when selecting just Knights Templar or a Grand Commandery.

## Officer Roster

Report: Officer Roster

Provides contact information for all members (past & current) that hold an office within a specific organization.

National:

State:

Local:

Officer Status:

Office:

[Run Report](#)  
[Get Raw Data](#)

---

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

**Officer Roster Report** Georgia Record Count = 72

National + State + Local

Last	First	Middle	Office Start Date	Address	City	State	Zip
Local #			Office End Date	Spouse			
Knights Templar							
Georgia							
Leazer Gary Herbert							
		Grand Prelate	05/07/2008	3318 Mansfield Ln	Snellville	GA	30039-463
Hendry D. W.							
		Grand Warder	05/06/2009	1976 Ramal Ct SW	Conyers	GA	30094-575
Leinbaugh Lloyd John							
		Grand Standard Bearer	05/06/2009	398 Anita Dr	Powder Springs	GA	30127-688
		Leinbaugh					

To access this report select the body you wish to pull a roster for. The user has the ability to filter this roster by a specific Office held. The user also has the ability to filter this roster by the Officer Status. *The Office drop down defaults to ALL and the Officer Status drop down defaults to CURRENT.* This report will automatically sort the results within each State level (first) and then to the local level.

### ***Components***

- National – National Body (ex. Knights Templar)
- State – State Body (ex. Grand Commandery)
- Local – Local Body (ex. Commandery)
- Officer Status – choice of Current or Past
- Office – Name of Office / Position
- Run Report – Press to Run Report based on criteria user selected
- Export – Export report to XLS, or DOC, or PDF format



## **Committee Roster**

Apportionment	Started	Ended
<b>Connecticut</b>		
Member		
<u>Ham, Edward R.</u> 1282311                      5 - Hamilton, Connecticut 43 Crescent Rd, Fairfield, CT 06824-5901	4/15/2012	
<u>Miller II, William L.</u> 1281755                      1 - Washington, Connecticut 4 Aspen Rise, East Granby, CT 06026-9413 H> william.l.miller@snet.net	4/15/2012	
<u>Saunders, Wayne</u> 1282423                      5 - Hamilton, Connecticut 141 N Stowe Pl, Trumbull, CT 06611-5056	4/15/2012	Spouse> Annelisa H> 860-651-1386
<b>ARMORY &amp; REGALIA</b>		
Member		
5 - DeMolai, Michigan		
Member		
<u>French, Daniel David</u> 1459862                      5 - DeMolai, Michigan 487 Lincoln Ave, Holland, MI 49423-4293 H> danielfrench@yahoo.com	4/14/2012	Spouse> Sharon H> 616-510-1161
<u>Hayden, Bruce Emanuel</u> 1334160                      5 - DeMolai, Michigan 1120 Fallingbrook Dr SE, Kentwood, MI 49508-6246 H> br2ch@att.net	4/14/2012	Spouse> Chris H> 616-455-7742
<u>Kelly, Micheal Robert</u> 1465889                      5 - DeMolai, Michigan 2262 Saginaw Rd Se, Grand Rapids, MI 49506-5440	4/14/2012	

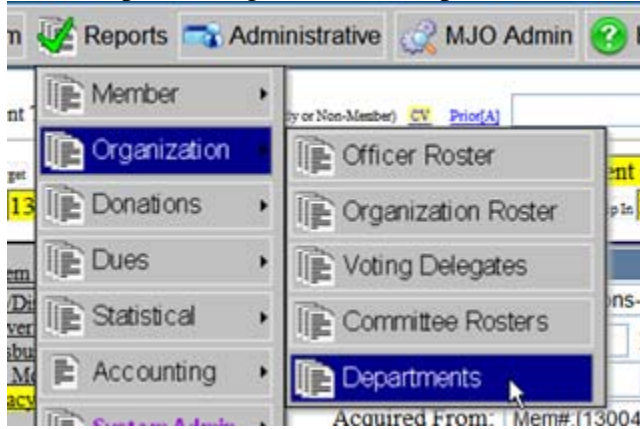
To access this report select the body you wish to pull a roster for. The user has the ability to filter this roster by a specific Committee Name and Role. The user also has the ability to filter this roster by Status. *The Committee Name drop down defaults to ALL and the Committee Status drop down defaults to CURRENT.* This report will automatically sort the results within each State level (first) and then to the local level.

### ***Components***

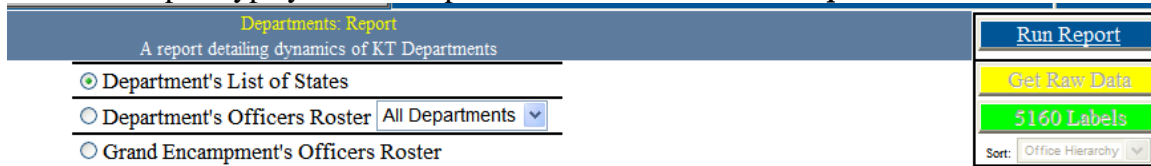
- National – National Body (ex. Knights Templar)
- State – State Body (ex. Grand Commandery)
- Local – Local Body (ex. Commandery)
- Committee Status – choice of Current or Past
- Committee Name – Name of Committee
- Role – Name of Role assigned
- Run Report – Press to Run Report based on criteria user selected
- Export – Export report to XLS, or DOC, or PDF format

## Departments

Go to Reports / Organization / Departments menu



Select the report type you wish to pull and click on the **“Run Report”** button



### *Sample of the Department's List of States format*

#### The Grand Encampment of Knights Templar

##### Department Listing

As of 9/5/2013

##### East Central

Illinois, Indiana, Kentucky, Michigan, Ohio, Wisconsin

##### Europe

Croatia, Italy, Portugal, Romania, Togo

##### Far East

Philippines

##### Mid-Atlantic

Delaware, District of Columbia, Maryland, North Carolina, Virginia, West Virginia

##### North Central

Iowa, Minnesota, Nebraska, North Dakota, South Dakota, Wyoming

##### Northeastern

Connecticut, Maine, Mass/Rhode Island, New Hampshire, New Jersey, New York, Pennsylvania, Vermont

##### Northwestern

Alaska, Colorado, Idaho, Montana, Oregon, Washington



*Sample of the Department's Officer Roster format*

<b>Mid-Atlantic Department Office Roster</b>			
<b>Grand Officers as of 09-05-2013</b>			
<b>Grand Commandery of Delaware</b>			
<b>Office</b>	<b>Name</b>	<b>Address</b>	<b>Spouse</b>
Grand Commander	James Gilbert Horn	PO Box 80, Lewes, DE 19958-0080	Joan
Grand Generalissimo	Gilbert Eugene Greenfield	1007 Lawndale Rd, Wilmington, DE 19810-3101	
Grand Captain General	James B. Walsh	113 Savannah Rd, Lewes, DE 19958-1437	
Grand Senior Warden	John A. Eberly	109 Tucket Cir, Dover, DE 19904-5398	RoseMarie
Grand Junior Warden	A. Tony Maxwell	1304 W 13th St, Apt 2, Wilmington, DE 19806-4245	
Grand Prelate	Thomas E. Morrison	1171 Adams Ct, Dover, DE 19904-2601	
Grand Treasurer	Mark E. Irwin	317 Kalorama Rd, Sykesville, MD 21784-7535	Melanie
Grand Recorder	Mark E. Irwin	317 Kalorama Rd, Sykesville, MD 21784-7535	Melanie
Grand Standard Bearer	Jon Burnau Cottrell	31 Melanie Dr, New Castle, DE 19720-3930	Ginny
Grand Sword Bearer	Lionel D. Hunter	2203 Alistar Dr, Wilmington, DE 19808-3301	Linda
Grand Warder	James L. Ferguson	39 Delshire Dr, Dover, DE 19901-1834	jeanette ferguson
Grand Sentinel	Bradley Driscoll	75 Range Rd, North East, MD 21901-4706	
Past Grand Commander	Arthur A. Loveless, Jr.	425 Gray St, New Castle, DE 19720-4953	
Past Grand Commander	Charles Arthur Depfer	1400 N Bancroft Pkwy, Wilmington, DE 19806-2428	
Past Grand Commander	Charles Granville McVey	701 Elkton Rd, Newark, DE 19711-4919	
Past Grand Commander	Charles H. Lengel, Jr.	2403 Magnolia Dr, Wilmington, DE 19810-2419	
Past Grand Commander	Charles Thomas Hart	2603 Ebright Rd, Wilmington, DE 19810-1146	Elissa

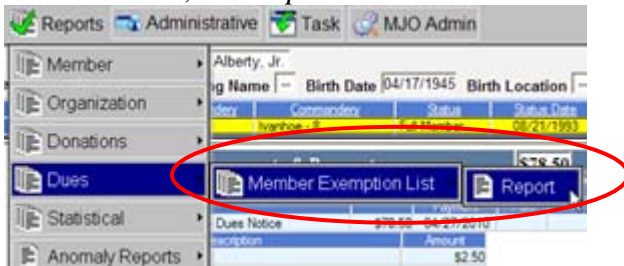
*Sample of the Grand Encampment's Officers Roster format*

<b>Knights Templar</b>			
<b>Grand Encampment Officer Roster</b>			
<b>Grand Officers as of 09-05-2013</b>			
<b>Office</b>	<b>Name</b>	<b>Address</b>	<b>Spouse</b>
Grand Master	David Dixon Goodwin	1509 Campus Dr, Vestal, NY 13850-4036	Marci
Deputy Grand Master	Duane L Vaught	7850 N Thames Dr, Bloomington, IN 47408-9337	Georgia
Grand Generalissimo	Jeffrey Norman Nelson	3112 Tyler Pkwy, Bismarck, ND 58503-0192	
Grand Captain General	Michael Burke Johnson	PO Box 575, Crowheart, WY 82512-0575	Judy
Grand Treasurer	James McCrory Willson, Jr.	PO Box 666, Floydada, TX 79235-0666	
Grand Recorder	Lawrence Eugene Tucker	PO Box 877, Bellaire, TX 77402-0877	Judy
Grand Prelate	Rev. William Dawson Hartman	951 Bridge St, Philadelphia, PA 19124-1710	Nancy
Department Commander	David Joseph Kussman	1781 N Pheasant St, Anaheim, CA 92806-1007	Kimberly
Department Commander	Edward R. Trosin, Jr.	1 Elmwood Park W, Tonawanda, NY 14150-3314	Barbara
Department Commander	Emilio Attina	Via Baraccone 3, 89131 Gallina di Reggio Calabria,, ITALY	Angela
Department Commander	Evaristo A. Leviste	22815 Cypress Dr, Carson, CA 90745-4752	Carmen-deceased
Department Commander	Howard Taft Burgess	114 Susie Rd, Belton, SC 29627-8626	Mary
Department Commander	Jeffrey Glen Burcham	439 Faulkner Ave, Martinsburg, WV 25401-2619	Tammy
Department Commander	Larry Wayne Brown	9351 E County Road 450 S, Selma, IN 47383-9799	Suanna
Department Commander	Lauren Raoul Handeland	1809 Sycamore Dr, Waukesha, WI 53189-7246	Sharon
Department Commander	Steven Larry Guffy	811 N Chelan Ave, Wenatchee, WA 98801-2027	Lana
Department Commander	T. Michael Fegan	PO Box 207, Junction City, KS 66441-0207	Debbie
Department Commander	Thomas X Tsirimokos	2395 Elm St, Manchester, NH 03104-2207	Virginia R. Tsirimokos

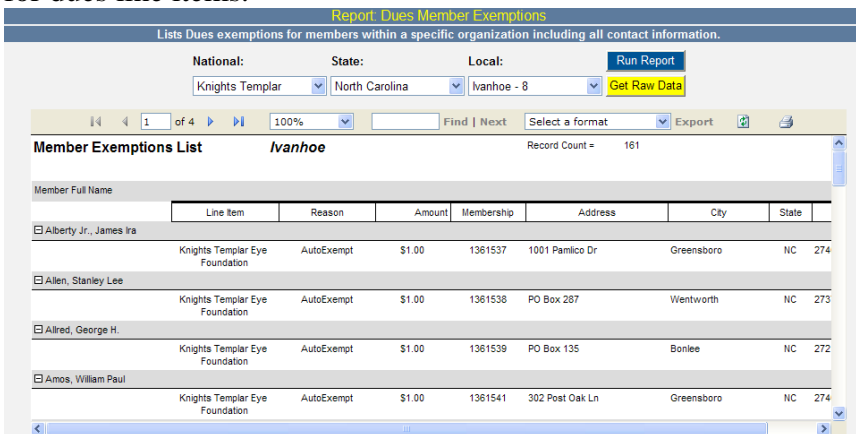
# Dues Reports

## Member Exemption List

To access this report, click on *Reports* menu, *Dues* sub menu, and *Member Exemption List* sub menu, and *Report*.



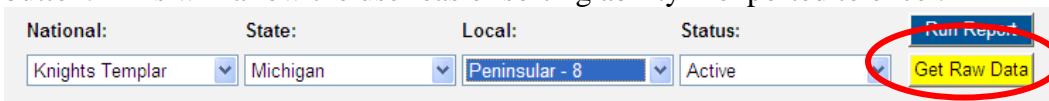
This report will display all members within a Commandery that have current exemptions for dues line items.



### Components

- National – National Body (ex. Knights Templar)
- State – State Body (ex. Grand Commandery)
- Local – Local Body (ex. Commandery)
- Run Report – Press to Run Report based on criteria the user selected
- Export – Export report to XLS, or DOC, or PDF format

To run a report without the system format structure, choose the **GET RAW DATA** button. This will allow the user easier sorting ability if exported to excel.

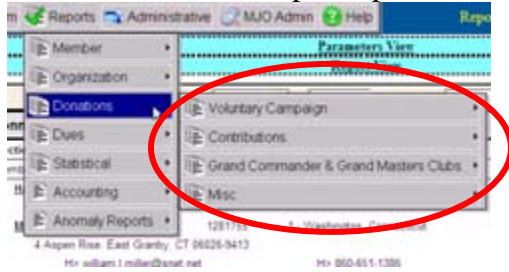


To print the report, use the print icon located on the top right of the header.

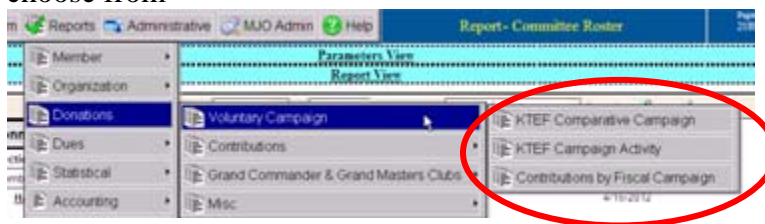


## Donation Reports

To access Donation reports, please select from the following sub menus



Under the *Voluntary Campaign* sub menu, you will find the following list of reports to choose from



*KTEF Comparative Campaign*  
*KTEF Campaign Activity*  
*Contributions By Fiscal Campaign*

## **KTEF Comparative Campaign**

This report allows a user to compare campaign contribution totals for Grand Commanderies against previous fiscal campaign cycles.

Week: From - Thru + State	39th			40th			41st	
	Account Count	Recorded Amount	Cumulative Balance	Account Count	Recorded Amount	Cumulative Balance	Account Count	Recorded Amount
01: 07/01 - 10/07	222	\$25,580.00	\$25,580.00	271	\$25,900.00	\$25,900.00	610	\$49,380.00
02: 10/08 - 10/14	52	\$7,090.00	\$32,670.00			\$25,900.00	45	\$4,480.00
03: 10/15 - 10/21	30	\$3,000.00	\$35,670.00	69	\$5,320.00	\$31,220.00	16	\$1,240.00
04: 10/22 - 10/28	51	\$6,540.00	\$42,210.00	83	\$4,720.00	\$35,940.00	33	\$3,720.00
05: 10/29 - 11/04	20	\$760.00	\$42,970.00	7	\$1,220.00	\$37,160.00	45	\$6,940.00
06: 11/05 - 11/11	44	\$5,420.00	\$48,390.00	54	\$8,470.00	\$45,630.00	48	\$4,310.00
07: 11/12 - 11/18	50	\$6,150.00	\$54,540.00	24	\$3,290.00	\$48,920.00	34	\$1,020.00
08: 11/19 - 11/25	22	\$1,860.00	\$56,400.00	35	\$3,309.00	\$52,229.00	31	\$6,330.00
09: 11/26 - 12/02	176	\$11,520.00	\$67,920.00	42	\$4,370.00	\$56,599.00	64	\$7,700.00
10: 12/03 - 12/09	277	\$13,440.00	\$81,360.00	82	\$9,600.00	\$66,199.00	51	\$5,100.00

To view the specific contributions for each period, please click the “plus sign”.

The user must first select a National body and then select the fiscal periods in which they want to compare. The user also has the ability to change the view of the results by selecting any of the options to the right.

- State+Week
- Week+State
- Sponsorship+Week
- Week+Sponsorship





## **KTEF Campaign Activity**

This report allows a user to analyze campaign activity as it breaks down for each Grand Commandery and Commandery as well as for each fiscal week in a selected campaign.

Report: Campaign Activity								
A breakdown of contribution totals, average and ranking by Grand Jurisdiction.								
National:	State:	Fiscal Campaign:			Campaign Week:			
Knights Templar	Maryland	42nd: 2009/07/01-2010/05/15			01: 2009/07/01-2009/10/10			
<a href="#">Run Report</a>								
National + State + Local								
Body Name	Total for Week:1	Cumulative Total	Rank	Active Members as of: 10/10	Active Member Per Capita Average	Rank	Quantity of Donations	Average Donatio Amou
<input type="checkbox"/> Knights Templar								
<input type="checkbox"/> Maryland	\$155.00	\$155.00		1,387	\$0.11		5	\$31.0
Antioch	\$0.00	\$0.00	7	88	\$0.00	7	0	\$0.0
Beauseant	\$20.00	\$20.00	3	87	\$0.23	2	1	\$20.0
Cambridge	\$0.00	\$0.00	12	26	\$0.00	12	0	\$0.0
Carroll	\$0.00	\$0.00	14	75	\$0.00	14	0	\$0.0
Chesapeake	\$0.00	\$0.00	9	114	\$0.00	9	0	\$0.0
Crusade	\$0.00	\$0.00	6	156	\$0.00	6	0	\$0.0
Jacques DelMolay	\$5.00	\$5.00	5	88	\$0.06	5	1	\$5.0
Maryland	\$0.00	\$0.00	13	159	\$0.00	13	0	\$0.0
Montgomery	\$0.00	\$0.00	11	69	\$0.00	11	0	\$0.0
Monumental	\$20.00	\$20.00	2	176	\$0.11	3	1	\$20.0

To view the specific contributions for each body, please click the “plus sign”.

The user must first select a National body and/or a Grand Commandery. Then select the campaign and a specific fiscal week in which they want to analyze. This report displays current and cumulative contribution totals for each body and also breaks out the contribution per active member.

Total for Week:1	Cumulative Total	Rank	Active Members as of: 10/10	Active Member Per Capita Average	Rank	Quantity of Donations	Average Donation Amount	Individual Unique Members Donating
\$155.00	\$155.00		1,387	\$0.11		5	\$31.00	5
\$0.00	\$0.00	7	88	\$0.00	7	0	\$0.00	0
\$20.00	\$20.00	3	87	\$0.23	2	1	\$20.00	1
\$0.00	\$0.00	12	26	\$0.00	12	0	\$0.00	0
\$0.00	\$0.00	14	75	\$0.00	14	0	\$0.00	0
\$0.00	\$0.00	9	114	\$0.00	9	0	\$0.00	0
\$0.00	\$0.00	6	156	\$0.00	6	0	\$0.00	0
\$5.00	\$5.00	5	88	\$0.06	5	1	\$5.00	1
\$0.00	\$0.00	13	159	\$0.00	13	0	\$0.00	0
\$0.00	\$0.00	11	69	\$0.00	11	0	\$0.00	0

## **Contributions by Fiscal Campaign**

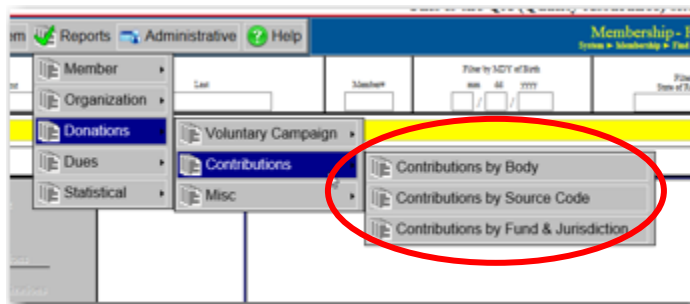
This report allows a user to display all disbursement records from a specific time period in a fiscal campaign cycle.

National + State + Local	# Records	Total Amount
Knights Templar	48	\$3,700.00
Louisiana	48	\$3,700.00
Ascension	7	\$210.00
Bethlehem	3	\$90.00
C.A. Eves	3	\$90.00
Crusader	3	\$110.00
Indivisible Friends	2	\$80.00
Ivanhoe	2	\$100.00
Jacques Delmolay	2	\$60.00
Malta	2	\$150.00
Malta	4	\$120.00

 A red circle highlights the 'C.A. Eves' Grand Commandery name in the table.
 

To view the specific contributions within each Grand Commandery click on the “plus sign” next to the Grand Commandery name.

Under the *Contributions* sub menu, you will find the following list of reports to choose from



- Contributions By Body*
- Contributions By Source Code*
- Contributions By Fund & Jurisdiction*



## **Contributions by Body**

This report allows a user to display all disbursement records that relate to a specific Grand Commandery and/or Commandery for a specific period of time.

**Report: Contributions by Body**  
A detail report of all contributions made to the Knights Templar Eye Foundation sorted by the credited body.

National:  State:  Local:  Posted Start:  Posted End:  [Run Report](#) [Get Raw Data](#)

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

**Contributions by Body** *Louisiana* Record Count = 7

National + State + Local	# Records	Total Amount
<input type="checkbox"/> Knights Templar	7	\$1,260.00
<input type="checkbox"/> Louisiana	7	\$1,260.00
<input type="checkbox"/> Ascension	2	\$60.00
<input type="checkbox"/> C.A. Everitt	1	\$200.00
<input type="checkbox"/> Indivisible Friends	1	\$300.00
<input type="checkbox"/> Plains	2	\$300.00
<input type="checkbox"/> Rhoades	1	\$400.00

12/4/2009 10:52:45 AM Page: 1 of 1 pages. KTEFBodyDetails

To view the specific contributions within each Grand Commandery, click on the “plus sign” next to the Grand Commandery name.

## Contributions by Source Code

This report allows a user to display all disbursement records from a specified Commandery for a specific Source Code type within a specified date range.

Report: Source Codes

Report of Contributions based on Jurisdiction, Date Range and Source Code

Include Contributions made to below selected Hierarchical Jurisdictions

<b>Grand Encampment*</b>	<b>Grand Commandery</b>	<b>Commandery</b>
Knights Templar	*All*	*All*

Include Contributions posted between  to

Report on all Source Codes (automatically excludes all 00LEGACY)  
 Report on the single Source Code selected below

Source Code	Start	Stop	Description	Sort
GENFND94	9/12/2011	9/12/2021	General Fund 94 - Assessments	1
GENFND96	9/12/2011	9/12/2021	General Fund 96 Memorial	1
GENFND97	9/12/2011	9/12/2021	General Fund 97 - Wills & Bequests	1
GENFND98	9/12/2011	9/12/2021	General Fund 98 - Trusts	1
LABS1110	10/1/2011	9/30/2013	Label Program 2011 Oct	1

---

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

**Source Code Report** For: Knights Templar, York Rite

Source Code Exact Match to: [ GENFND96 ] Donations between: 01/01/2012 - 07/13/2012

Source Code	Date Posted	Batch	Date Received	Total
				\$12,985.95
<input checked="" type="checkbox"/> GENFND96	General Fund 96 Memorial Start:[09/12/2011] Stop:[09/12/2021]			<b>\$12,985.95</b>
<input checked="" type="checkbox"/> Endowment				\$7,410.00
<input checked="" type="checkbox"/> Contributions-92				\$6,310.00
<input checked="" type="checkbox"/> Grand Club-91				\$1,000.00
<input checked="" type="checkbox"/> Patrons-89				\$100.00
<input checked="" type="checkbox"/> General				\$5,575.95
<input checked="" type="checkbox"/> Contributions-95				\$530.00
<input checked="" type="checkbox"/> MemHon-96				\$5,045.95

To view the specific contributions within each Account, click on the “plus sign” next to the Account type.



## **Contributions by Fund & Jurisdiction**

This report allows a user to display all disbursement records for a specific Commandery that relate to a specific Fund and/or Account for a specific time period.

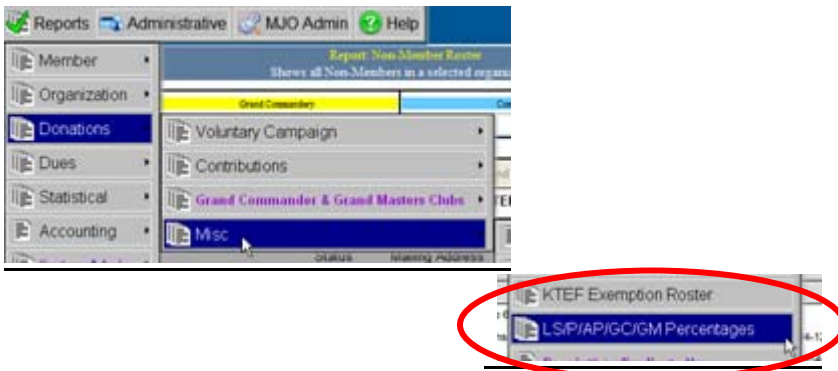
Report: Contributions by Fund & Jurisdiction						
Lists Contributions for a specified time period with sorts-&-groups by Fund & Jurisdiction						
Fund	Account	Sub Account	Posted Start	Posted End	Include Disbursement details?	
Endowment	*ALL*	* ALL *	1/1/1900	7/14/2014	<input checked="" type="radio"/> Yes <input type="radio"/> No <small>Warning: Using YES may result in a report larger than your browser can handle.</small>	
Grand Encampment*	Grand Commandery	Commandery (NO/US/CA)				
Knights Templar	Tennessee	*All*				

Account	Name	Date	Status	Effective Date	Amount	Description
1400504	Adcock, Randall Thomas	12/19/2005	Demitted	04/28/1999	232763	\$30.00
1400505	Adler Jr., Charles Wilson	12/19/2005	Suspended	05/04/1995	208382	\$30.00
1400508	Agee Jr., Robert David	08/04/2009	Suspended	04/18/1994	201260	\$30.00
1400507	Agee Sr., Robert David	08/21/2012	Suspended	04/23/1997	221261	\$30.00 Manually added Legacy record.
1400506	Agee, Howard Cecil	01/01/1900	Deceased	05/15/2001	246309	\$30.00
1400509	Aiken, Glenn Weese	01/01/1900	Deceased	05/15/2001	246203	\$30.00
1472440	Akers, Joshua Michael	10/26/2013	Knighted	11/01/2013	288048	\$30.00 Rcvd check #3802 from Nashville Commandery No. 1 for purchase 9 Life Sponsors. One LS purchased for Joshua Akers
1400510	Alcorn, Franklin Delano	12/07/2008	Demitted	04/18/1994	201261	\$30.00
1478245	Alexander, Clarence Franklin	04/21/2014	Affiliated	05/01/2014	290314	\$30.00 ck128 \$60 rcvd from Nashville #1 TN for 2 LS for mbrs
1400511	Alexander, Ricky Ulrick	06/15/2007	Suspended	04/28/1999	232764	\$30.00
1400512	Allen Jr., James West	12/12/2005	Suspended	05/15/2001	246310	\$30.00
1400515	Allen, Bobby Samuel	01/01/1900	Deceased	06/27/2001	246667	\$30.00
1400513	Allen, Johnnie Clay	08/07/2007	Suspended	04/28/1999	232765	\$30.00
1400514	Allen, Wayne Eugene	09/29/1979	Knighted	10/13/1995	209491	\$30.00
1400516	Alburns, Allen Howard	12/20/2010	Suspended	05/05/2009	277814	\$30.00
1448540	Anderson Jr., Joseph Roger	10/24/2009	Knighted	01/14/2010	278977	\$30.00
1466628	Anderson Sr., Joseph Roger	04/14/2012	Knighted	07/25/2012	285784	\$30.00 Rcvd check #3705 from TN-#1-Nashville for purchase of LS for Joseph Anderson
1400517	Anderson, Joe Lawrence	12/17/2007	Suspended	04/28/2000	239794	\$30.00

To view the specific contributions within each Account, click on the “plus sign” next to the Account type.

Under the *Misc* sub menu, you will find the following list of reports to choose from



- KTEF Exemption Roster*
- LS/P/AP/GMC/GCC Percentage*
- Life Sponsor 100% Roster*
- LS/P/AP/GCC/GMC Percentage Report*

# KTEF Exemption Roster



System Reports Administrative MJO Admin Help Reports - KTEF Exemption Roster Page: 2322

**KTEF Exemption Roster**  
Information on all members within a specific organization including all contact information.

Grand Exemption*	Grand Commandery*	Commandery (LOCAL/BLM)	Account	Status
Knights Templar	Maryland	5 - Crusade	Any Exemption	-Active-
			Show Exemptions which are/were effective as of what date: 7/23/2013	

[Run Report](#)  
[Get Raw Data](#)  
5160 Labels  
 Sort: Zipcode

Annual Report Detail Only – Part 2 KTEF Deductions										From: 1/1/2013	Thru: 5/22/2013	
Knights Templar, State, Commandery												
Last, First Middle	Exemption Effective	Receipt#	Birthdate	Sponsorship Kind	City	State	Member#	Status	Status Date	LastMod		
							LS	AP	P	Members with Exemptions		
Delaware							72	2		74		
1 - St John's							72	2		74		
<b>Allen, Philip Vaughn</b>			12/06/1951	Life Sponsors-88	New Castle	DE	1283031	Full Member	10/02/2012	5/23/2013		
	11/13/2006	267398						1				
<b>Atkinson, Herbert John</b>			10/08/1949	Life Sponsors-88	New Castle	DE	1283034	Full Member	12/10/1996	5/23/2013		
	12/18/1990	174148						1				
<b>Atkinson, Thomas John</b>			12/25/1980		Newark	DE	1283035	Full Member	08/20/2005			

To utilize this report the user must select the LOCAL body they wish to pull the roster for. The user also has the ability to filter this report based on account type and status condition.

The report sorts results based on the following “importance” of contributions.

- i. Life Sponsor
- ii. Associate Patron
- iii. Patron



The report sums the appropriate contribution totals in the top header of the report.

KTEF Exemption Roster									
Parms: 36 - Bethel, Illinois - Members with Any Exemption - Membership Status: Active									
Knights Templar, State, Commandery									
Last, First Middle	Birthdate	City	State	Zip	Member#	Status	Status Date		
Exemption Effective	Receipt#	Sponsorship Kind			LS	A	P	Members	
Illinois					104	3	3	110	
36 - Bethel					104	3	3	110	

**Components**

- National – National Body (ex. Knights Templar)
- State – State Body (ex. Grand Commandery)
- Local – Local Body (ex. Commandery)
- Account – choice of Life Sponsor, Patron, and Associate Patron, any, or none
- Status – Choice of Active or any specific status condition in the system

**LS/P/AP/GMC/GCC Percentage**

Select a National, State or Local level to run this report and a “As of Date”

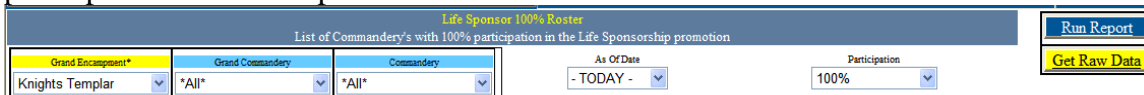
Report: LS/P/AP Percentages													
Report As Of: 07/14/2014													
Record Count: 57													
	Active Members	Life Sponsor ONLY		Patron ONLY		Associate Patron ONLY		GCC ONLY		GMC ONLY		Unique Exemptions LS+P+AP	
York Rite	4,133	2,281	55.2%	58	1.4%	166	4.0%	36	0.9%	83	2.0%	2,307	55.8%
Knights Templar	4,133	2,281	55.2%	58	1.4%	166	4.0%	36	0.9%	83	2.0%	2,307	55.8%
Illinois	4,133	2,281	55.2%	58	1.4%	166	4.0%	36	0.9%	83	2.0%	2,307	55.8%
1 - Apollo	123	114	92.7%	7	5.7%	9	7.3%	1	0.8%	3	2.4%	114	92.7%
2 - Belvidere	51	21	41.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	21	41.2%
3 - Peoria	143	143	100.0%	2	1.4%	3	2.1%	0	0.0%	1	0.7%	143	100.0%
4 - Joliet	97	94	96.9%	1	1.0%	3	3.1%	0	0.0%	0	0.0%	94	96.9%
5 - Blaney	50	43	86.0%	0	0.0%	0	0.0%	0	0.0%	1	2.0%	43	86.0%
6 - Elwood	80	78	97.5%	1	1.3%	2	2.5%	1	1.3%	2	2.5%	78	97.5%
7 - Freeport	53	7	13.2%	0	0.0%	3	5.7%	0	0.0%	0	0.0%	7	13.2%
8 - Galesburg	55	20	36.4%	0	0.0%	1	1.8%	0	0.0%	0	0.0%	20	36.4%
9 - Beaumanoir	73	59	80.8%	3	4.1%	2	2.7%	0	0.0%	1	1.4%	59	80.8%

To view the specific contributions within each State and/or Local Commandery, click on the “plus sign”.

## Life Sponsor 100% Roster



Select the Grand Commandery or Commandery you wish to display, select an **“As of Date”** (defaults to current date) and select a **percentage range** (defaults to 100%) for participation with Life Sponsors.



The report will calculate the # of active members for the requested Commandery(s) and then calculate the # of Life Sponsors purchased for each member (NOTE: Only counts 1 per member).

Life Sponsor Roster: 100%					As Of Date:	09/12/2012
	Members	Rate	Recorder		Count	
Knights Templar						45
Alabama						1
Anniston Commandery No.23	143	100.00%	Beck, Richard Carl			
Arizona						2
Columbine Commandery No.9	23	100.00%	Howell, Robert E.			
Yuma Commandery No.10	43	100.00%	Holbert, Douglas Lee			
Georgia						1
Douglasville Commandery No.40	130	100.00%	McCall Sr., Emmet Ray			
Idaho						1
Idaho Falls Commandery No.6	43	100.00%	Taylor, Donald D.			
Illinois						1
Cyrene Commandery No.23	1	100.00%				
Indiana						1
Greencastle Commandery No.11	51	100.00%	Phillips, Wesley Kris			
Iowa						5
Antioch Commandery No.43	57	100.00%	Smith, Robert L.			
Crusade Commandery No.39	25	100.00%	Jentz, William Henry			
Kenneth Commandery No.32	22	100.00%	Armstead, Edwin E.			
Melita Commandery No.64	36	100.00%	Hameston, Delbert R.			



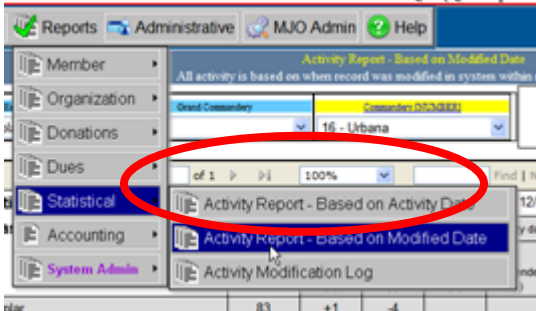
# Statistical Reports

*Activity Report-Based on Modified Date*

*Activity Modification Log*

*Annual Return*

## Activity Report – Based on Modified Date



- d. This report calculates based off of a Modified Date. The report now allows a detailed display at the Grand Commandery level.

Activity Report - Summary or Detail  
Provides a statistical breakdown of membership numbers for each organization based on a specific date range.

Run Report  
Get Raw Data

Grand Encampment*	Grand Commandery	Commandery (NUMBER)	From Date	Thru Date	Format
Knights Templar	Minnesota	*All*	1/1/2013	12/31/2013	<input checked="" type="radio"/> Summary <input type="radio"/> Detail

Activity Report - Based on Modified Date  
All activity is based on when record was modified in system within requested date range.

Run Report  
Get Raw Data

Grand Encampment*	Grand Commandery	Commandery (NUMBER)	From Date	Thru Date	Format
Knights Templar	Kansas	5 - Topeka	1/1/2013	7/23/2013	<input type="radio"/> Summary <input checked="" type="radio"/> Detail

Activity Report (Detailed) Period Start: 01/01/2013 End: 07/23/2013

All activity is based on the modified date (when updated) that falls within requested date range

Based on Modified date	Active Members At Start	Knighted (+)	Demitted (-)	Affiliated (+)	Suspended (-)	Reinstated (+)	Expelled (-)	DelAdj (-)	Died (-)	Active Members At-End	Modified Date
Knights Templar	124	+2		+1	-2				-5	120	
Kansas	124	+2		+1	-2				-5	120	
5 - Topeka	124	+2		+1	-2				-5	120	
Bartley, Stan	1470976										03/10/2013
Combs, Mark A.	1313794				12/31/2012						01/23/2013
Converse, Harry Hunt	1313796								08/14/2005		01/23/2013
Emmert, John M.	1313813								01/09/2012		01/23/2013
Goetsch, Henry Lee	1313826								07/13/2008		01/23/2013
Maichel, Farrell D.	1313871				12/31/2012						01/23/2013
McCraken, John Brandon	1470147										01/23/2013
Norris, Walter Blurt	1313894								11/03/2012		01/23/2013
Scheibler, Virgil Raymond	1313924								05/20/2012		01/23/2013
Stiles, Joesphe Gilleum	1470146				12/01/2008						01/23/2013

**Components**

- Start Date – The beginning date of the Date range needed (This defaults to 1/1/ if the current year)
- End Date – The end date of the Date range needed (This defaults to 12/31 of the current year)
- Format – Select **Summary** or **Detail**
- Run Report– pressing this button will begin processing the requested report

## **Activity Modification Log**

Activity Modification Log

Grand Encampment\*  
Knights Templar

Grand Commandery  
Louisiana

Commandery  
1 - Indivisible Friends

Run Rep

Get Raw L

From: 1/7/2011 Thru: 1/10/2011 Show: \*\*ALL\*\* Changes being tracked

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

**Changed Data Tracking Report** Report Parameters Used: Show: \*\*ALL\*\* Changes being tracked, From: 01/07/2011-thru-01/10/2011, For Members In: Commandery - 1 - Indivisible Friends, Report By: Allen, Michelle

Member Name	When Changed	What Changed
User ID	User's Group	User's Last, First
		Before Change > After Change

To utilize this report the user must select a date range and a body to pull the statistical information. This report will display all **user** modifications made to the specified body within the system during the specified date range. Modifications that are captured in this report include: *People: Last Name, First Name, Phone Numbers, Emails, Birth Date, Death Date, and Addresses. Membership: Status changes, Status Date changes, Orders changed or deleted, Life Sponsors, Patrons, and Associate Patron contributions made, changes made to a member's Mailing Options for the GEKT monthly magazine and any KTEF solicitation mailings*

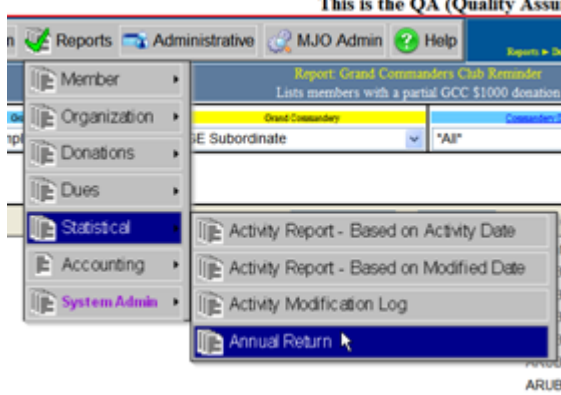
The report will display the type of modification made, a before and after snapshot of changed data, and who changed the data in the system.

**Components**

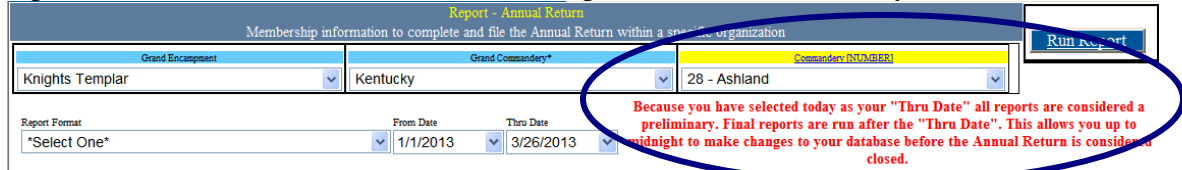
- Start Date – The beginning date of the Date range needed (*user can NOT enter in a date prior to January 7<sup>th</sup>, 2011*)
- End Date – The end date of the Date range needed
- Run Report – Press to Run Report based on criteria the user selected
- Export – Export report to XLS, or DOC, or PDF format

# Annual Report

Go to Reports / Statistical / Annual Returns



b. When the report opens, the user will see a red message stating that running the report with an 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.



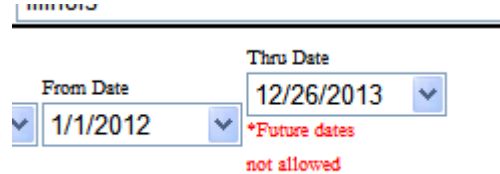
## Example of Preliminary Report

**Preliminary**

**Annual Report Detail Only – Part 2 KTEF Deductions** From: 1/1/2013 Thru: 3/21/2013

Knights Templar, State, Commandery											
Last, First Middle	Exemption Effective	Receipt#	Birthdate	Sponsorship Kind	City	State	Zip	Member#	Status	Status Date	
								LS	AP	P	Members
Pennsylvania								29			29
61 - Oriental								29			29
<u>Ayres, John M.</u>					Johnstown	PA	15905-3818	1390037	Full Member	11/27/1956	
		215436		Life Sponsors-88				1			
<u>Barbus, Terry</u>			05/15/1953		Robinson	PA	15949-0072	1390041	Full Member	10/29/1979	
		108460		Life Sponsors-88				1			
<u>Baum, Robert S.</u>			12/14/1915		Johnstown	PA	15905-2557	1390043	Full Member	11/29/1975	
		000045		Life Sponsors-88				4			

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



The user must also select the appropriate Report Format.



**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.



**Annual Statistical Report - Start: 01/01/2012 End: 12/31/2012**

**Grand Commandery of Kentucky**

**Ashland Commandery No. 28**

**Stationed at Ashland, KY**

Total Working Commanderies = 1

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

Total number members on last return =		<u>133</u>
Total number KNIGHTED =	<u>2</u>	
Total number AFFILIATED =	<u>0</u>	
Total number REINSTATED =	<u>0</u>	
Total Gain (+)	<u>2</u>	
Total number DEMITTED =	<u>2</u>	
Total number SUSPENDED =	<u>3</u>	
Total number DECEASED =	<u>7</u>	
Total number EXPELLED =	<u>0</u>	
Total number DELETE ADJUSTMENT =	<u>0</u>	
Total Loss (-)	<u>12</u>	
Net Gain (Net Loss) =		<u>(10)</u>
Total number of members (including Dual and Plural) on this report as of	12/31/2012 =	<u>123</u>

**KNIGHTS TEMPLAR EYE FOUNDATION**

Living/Active Life Sponsors =	<u>26</u>
Living/Active Associate Patrons =	<u>2</u>
Living/Active Patrons =	<u>0</u>
Total Deductions	<u>28</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.



**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) on this report as of 03/20/2013 = 93 \* 92

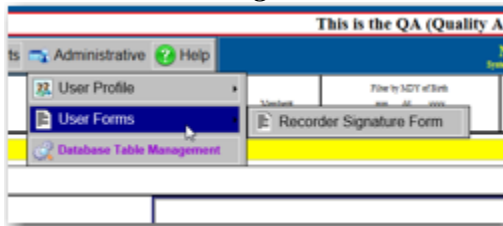
\* Your Annual Return can not calculate correctly because of a data issue, please call your System Administrator.

**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)

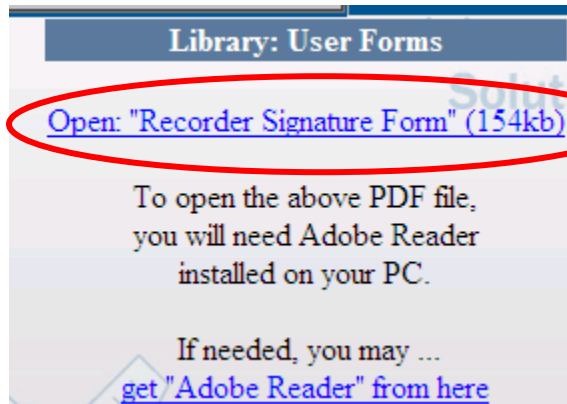
Report - Annual Return										
Membership information to complete and file the Annual Return within a specific organization										
Grand Encampment	Grand Commandery*	Commandery (NUMBER)								
Knights Templar	Kentucky	28 - Ashland								
Report Format	From Date	Thru Date								
Annual Report Detail Only – Part 1 Statistical	1/1/2012	12/31/2012								
Annual Report Detail Only										
Part 1 Statistical										
	Active Members At Start	Knighted (+)	Demitted (-)	Affiliated (+)	Suspended (-)	Reinstated (+)	Expelled (-)	DelAdj (-)	Died (-)	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								12/27/2012	
Bailey, Homer	1319388				06/30/2012					
Bush, Cecil Maynard	1319407								02/18/2012	
Caskey, Kristin M.	1319413				06/30/2012					
Church, Beachal R.	1319417								03/16/2012	
Clark, Hobert L.	1319418								06/09/2012	
Crum, James P.	1463127	08/13/2012								
Fitzpatrick, Larrv	1319456		01/16/2012							

## Accessing User Forms

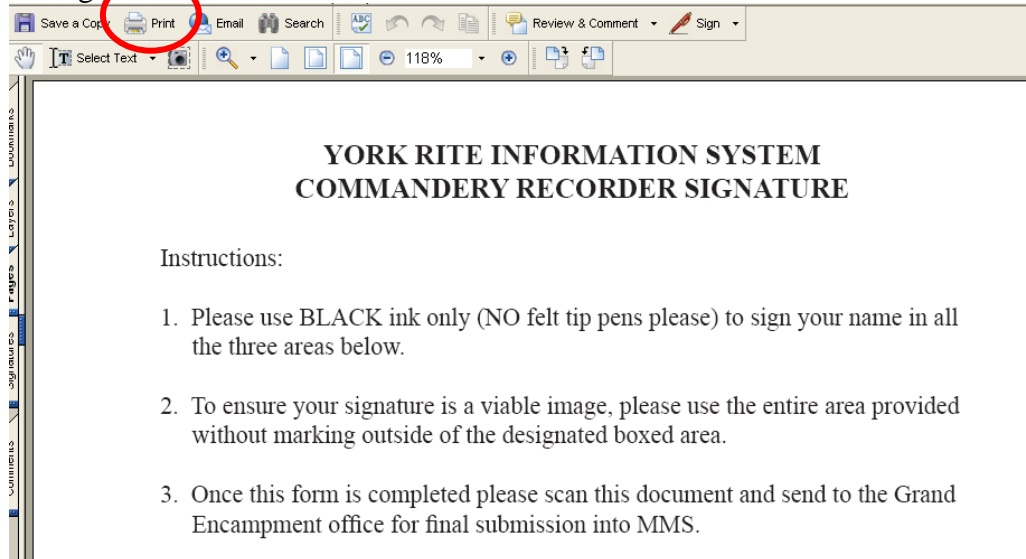
To access the Recorder Signature Upload form, click on *Administrative/User Forms/Recorder Signature Form*



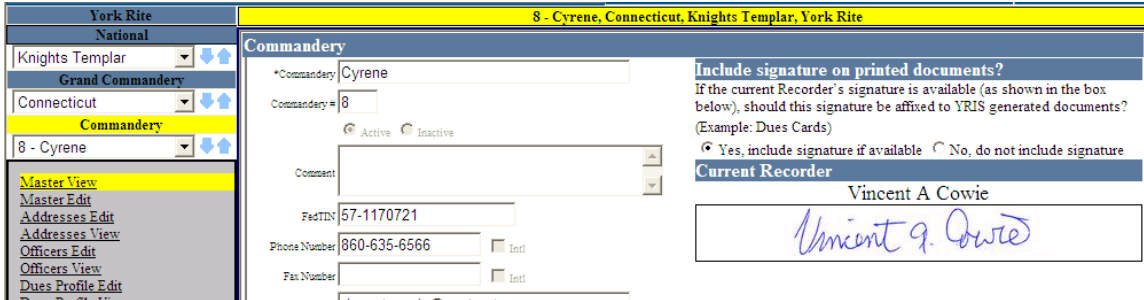
The form is stored in the database as a PDF document. To access it, click on the PDF name below



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



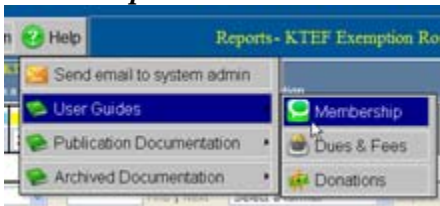
*NOTE: if a Recorder signature has been uploaded into MMS, the signature image will appear in the Organizational Master-Edit core function screen.*



## Help Menu

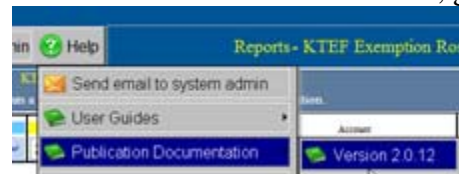
All users have the ability to access the MMS Quick Service Guides for all 3 modules if the database: *Membership, Donations, and Dues/Fees.*

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/ Publication Documentation** menu item.



For all prior release notes, go to **Help/Archived Documentation** menu item.

