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# Introduction

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## The Program

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The LODGEiCAL program and its accompanying manual were written by Norman M. Schultz, a Pastmaster of Ocean Park Lodge # 369. The program is intended to be an aid to the Secretaries of Masonic Lodges in performing some of their routine tasks.

*Note: This program is not intended to be used as a replacement for any of the record keeping requirements of The Grand Lodge of California.*

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## Minimum System Requirements

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The minimum system requirements to operate the program are an IBM 486 or higher compatible computer with 4 MEGS of RAM, DOS 3.0 or higher, Windows 95 or higher, SVGA Monitor, 1.44 MB Floppy Drive and a Hard Drive with at least 10 Megabytes of free space.

*Note: While the application will run of the minimum configuration, you will not be happy with the performance.*

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## System Recommendations

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I strongly recommend if you have a 486 and/or 8 MEGS of RAM that you give serious consideration to upgrading your computer.

I would upgrade to at a 486/133 or Pentium 100 with at least 16 MEGS of RAM and Windows 95 or later. With the prices what they are today the cost would be in the low to moderate range to make the upgrade. A completely new machine would still be a moderate investment and the increase in performance would surprise you.

### Another reason...

The newer applications are all being written for Windows 95 and higher and a 386 will just not handle that platform with any degree of user satisfaction. As time goes on you will become unable to run the upgrades for this and other applications with any degree of efficiency if at all.

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## Author's Note

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It is my hope that this program will make the job of being a Lodge Secretary a little easier. It came in to being almost by accident in a conversation on in an office of the California Grand Lodge. It has been one of the most interesting and rewarding experiences of my life. I have met hundreds of fine Masons that I would never have known. In its evolution, I have had the help of many fine and dedicated secretaries. "LODGEiCAL" has come a long way since the release of Version 1 in 1986. New features have been added and others expanded to include additional options. No program can ever be said to be finished because of the ever changing demands of the job. No one person can think of, nor anticipate, all that is needed to write the "perfect application." But with the goal of creating the "near perfect application" or at least one that is as responsive to your needs as is possible, I welcome your comments and suggestions for its improvement.

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## Liability Disclaimer

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Because I have no idea how you will use this program (I am reminded of the fellow who attempted to trim his whiskers with a rotary lawn mower) I cannot be held responsible for any damage caused or alleged to have been caused by any part of this product. This includes, but is not limited to: paper cuts from the manual pages, pinched fingers from the binder rings, loss of vision from an angrily tossed diskette, military coups, polar ozone depletion, core meltdowns, or a democrat in the White House.

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# Installation

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## Installing LODGEiCAL when running Windows 3.x

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You must have Windows 3.x running on your computer when you begin the installation process. Place the installation disk in either the A or B drive. From your Program Manager select File and then RUN. Type “A:\SETUP” or “B:\SETUP” depending on which drive you have placed the installation disk. Press ENTER and follow the instructions on the screen. Accept all default settings. The program will install from the installation disks in your floppy drive hard in a directory called WINLODGE.

*Note: Even though the installation program asks you at one point if you wish to change the drive and/or directory, accept the default. (c:\winlodge) Do not attempt to change this drive or directory. The program will not run if you do.*

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## Installing LODGEiCAL when running Windows 95/98

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You must have Windows 95/98 running on your computer when you begin the installation process. Place the installation disk in either the A or B drive. Mouse click on the “Start” button at the lower left hand corner of the screen. Select “run” from the pop up menu. Type in “A:\setup.exe” or “B:\setup.exe” and mouse click on the “OK” button. Follow the instructions on the screen. Accept all default settings. The program will install from the installation disks in your floppy drive hard in a directory called WINLODGE

*Note: Even though the installation program asks you at one point if you wish to change the drive and/or directory, accept the default. (c:\winlodge) Do not attempt to change this drive or directory. The program will not run if you do.*

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## Installing the Postal Bar Code Font

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During installation the font was copied to your “Windows\System” directory on your hard drive. However it must be installed manually before the program can use it.

*Note: You must do the following whether or not you intend to take advantage of the Postal Bar Code Sort Discount. If you do not install the font the program will not operate properly.*

1. Click on the “Start” button, the “Settings” button and open the Control Panel.
2. Open Fonts.
3. Click on File.
4. Click on Install New Fonts.
5. In the “Directory” window open the “C\Windows\System” folder.
6. Scroll down until you find the “ZipCodeBarcodeTT-Regular (True Type)” font.
7. Highlight it.
8. Click on the “OK” button.
9. Close all of the windows.

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## Upgrading from earlier version

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1. Place the upgrade disk in the A or B drive.
2. Go to DOS or open a DOS window.
3. Type A: or B: depending on which drive has the upgrade disk.
4. Type **UPGRADE** (does not have to be in caps.)
5. Press the ENTER key.

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# Read This Page First

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## Important Information

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It is *imperative* that data entries be made in a certain manner. The “computerize” term for this is “convention.” Various sections of the program look for data to be stored in certain order. If it is not stored the way the computer expects to find it, errors will result, There is a “computerize” term for this also; “GIGO.” It stands for *Garbage In Garbage Out*. Please follow the instructions. If a “space” is asked for, press the space bar, if a “comma” is requested, type in a comma, etc. There is a reason for these instructions and doing it this way now will save a lot of reentry time later.

### Full Name Field

Names must be entered in the following manner. Last Name (any suffix like, II, Jr. etc.) a comma, First Name - a space and then the Middle Name or Middle Names if more than one. Example: A person named John William Wilson Jr. who goes by the name of Bill Wilson or John W. Wilson, would be entered as follows; in the name field, Wilson Jr., John William.

### Common Name Field

In the “Common Name” field as Bill Wilson or John W. Wilson. There must be an entry in this field or rosters, mailing labels and other forms will not print properly.

### Date Fields

The date fields require some attention. They use a four (4) digit year. Single digit months and days require a leading “0” when entered, Example: If the date is January 5, 1987, you would enter it as 01/05/1987. After you have pressed the ENTER key it will display as either Jan 05, 1987 or as 1/ 5/1987.

### Degree Dates

It is *imperative* that all three degree dates be entered. Various sections of the application will no function properly if they are not.

### Printing of Continuous Forms

If you have no printer installed on your system capable of printing continuous forms you will be so notified. If you have more than one printer installed which can print continuous forms the program will prompt you to select the printer you wish to use when printing a test in order align the form. When you have the form properly aligned you will again be prompted to select the desired printer and the forms will then be printed. If you have only one printer on the system that can print continuous forms the printer selection screen will not appear.

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## Things You Will Need

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### Dues Receipts and Life Membership Certificates

When you place you order for either these receipts or certificate be sure to indicate that you are using this application and you wish the receipts which were designed to be printed by computer.

### Pin Feed - Dot Matrix Printer Mailing Labels

In order that you may print Mailing Labels you must use the same size labels that the program expects to find in the printer. Pin Fed labels use Avery Number 4014 Pin Fed Labels. You may use another manufacturer if you wish but the labels must be 4 inches wide by 1 7/16 inch high, one up.

### Laser and Ink Jet Printer Mailing Labels

Sheet Labels are Avery Number 5262, 5162 or 5162B, 1 /3 by 4 inches, 14 per page; or Avery Number 5261, 5161 or 5161B, 1 by 4 inches, 20 per page; or Avery Number 5260, 5160 or 5160B, 1 by 2 5/8 inches, 30 per page. The Avery numbers for these sheet labels indicate the number packaged as follows. The 5260, 5261 and 5262 have 25 sheets, the 5160, 5161 or 5162 have 100 sheets, and the 5060, 5061 and 5162B have 500 sheet per package. You may use labels supplied by a different manufacturers but they must be exactly the same size as those listed above. The program was tested using Avery Labels and the program will print properly with these labels.

### Label Formatting

125 - D \*\*\*\*\* All for ADC 901  
Norman M. Schultz  
39705 Golfers Drive  
Palmdale, California 93551-2947

93551 294705

The top line on the label prints three different pieces of information. The number on the left most side is the number of the label printed. In this case it would be the 125th label. The letter “D” indicates the sort code. “D” is 5 digit sort, “3” is 3 digit sort, “A” is ADC (Area Distribution Center)sort and “MS” is the miscellaneous left over. The “All for ADC 901” indicates that this is the first label of a particular bundle which is to be routed to that ADC number, in this case 901. This information will print only on the first label of each bundle. Place the label with the ADC number on top of each new bundle and move on to the next one and continue this procedure until you’ve finished the miscellaneous group which will be the last bundle.

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# Terms Used In This Manual

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## **Menu Bar**

A menu with a reversed area located at the top of the screen indicating a particular section or file to which to go or a function to perform. The menu bar has the following selections. Files, Lists, Forms Reports, Mailing Labels, Dues/Homes, Receipts, Help and Exit.

## **Combo Box**

A special field located near the top of the screen used to locate a particular record or make a given selection. There is an arrow button at the right of the combo box. When pressed, it will cause a drop down selection menu to appear from which your selection may be made. Generally in this program it will be used to select names of individuals in the various files. Although it will also be used to select groups of individuals within those files at times for lists or reports.

## **Group Code**

A code letter entered in the Group Code field to indicate a given "group" to which that individual belongs. i.e. you may wish to divide the individuals in the various files into different groups so that

they may be contacted by that group. Those who live in the local area, those who are shut in, craftsmen, etc. You may wish to divide your membership up into groups for phone committee distribution. This is an optional feature, but it is useful.

## **Committee Code**

A code letter like the Group Code field above but for the purpose of placing a member into a committee.

## **Scroll Bar**

A "Bar" at the right side of the screen when lists of various kinds are displayed. With the arrow buttons at the top and bottom of the bar you are able to scroll up and down through the information displayed thereon.

## **Record Selectors**

A group of arrow buttons at the bottom of the screen which allow you to select the either the first or last record in the file or scroll between records.

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# Getting Started

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This manual makes certain assumptions. The major assumption is that you are familiar with use of the DOS operating system and the Windows GUI, (graphical user interface). This manual is instructional in the use of the Windows version of the LODGEiCAL software application alone. If you need help with either DOS or Windows, consult your distribution manuals, use the on line help for Windows, or contact Microsoft technical support.

To begin the program Mouse Click on the LODGEiCAL icon. The first screen you will see is the Opening Menu. From the Menu Bar make your selection.

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## The System File

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From the menu bar, choose "Files" and then System. Enter the date chartered. Enter the name of your Lodge Secretary. Enter the Lodge phone number. Close the screen.

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## Exporting Data

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Although I have tried to include all the necessary and desirable features in "LODGEiCAL" I realize that no application can ever include every possible method of data manipulation to satisfy every user of the program. One possible use is for CASS certification required by the Post Office in order to take advantage of Bar Code Discounts. To export the data in the files to a comma delimited file get to the Main Menu screen Menu Bar, Files drop down menu. There is a selection called "Export ... ." By selecting this item you will be able to export all the data in the Archive, Candidate, Member, Non Member, Sojourner, Suspended and Widows files. You may then use this data in what ever manner you wish.

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## Requirements for "CASS Certified Bar Code Sort" discounts

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In order for your Lodge to be able to take advantage of the Bar Code Bulk Rate Discount you must first have your mailing list "Coding Accuracy Support System" (CASS) certified. This can be done by the Post Office one time at no charge. ***After which you must have your mailing list certified annually by some outside agency or purchase software from a third party vendor and do it yourself each year.*** I have no information as to the cost of having an outside vendor certify your list. If you choose to do it yourself the software will print

the Certification Certificate which you will need to take to the Post Office in order to qualify for the next calendar year. The software I have priced costs between \$100.00 and \$300.00 with annual upgrades sold at an additional fee and require that you have a CD ROM Drive on your Computer. The savings on a typical mailing of 500 pieces is in the neighborhood of \$4.00 to \$5.50 a month or between \$48.00 and \$66.00 annually, depending upon the breakdown of your mailing list. You may wish to consider the cost of purchasing a CD ROM Drive and installing it in your computer along with the additional cost of the software and annual upgrades when compared to the "savings" to determine whether it would be economical to apply for the CASS certification in the first place.

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## Setting up Group and Committee Codes

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Click on Files on the menu bar of the opening screen. This will drop down a list. At the top of the second division you will see "Committee Codes" and "Group Codes". Select these one at a time and enter a "code" and "description" for each Committee your Lodge wishes to establish and each Group into which you wish to define.

You will find that there are already a few entries in each table. The Public Schools and Constitution Observance committees have already been entered. In the Group Code section there are also a few codes there. They will serve as an example of how the entry should be made. These may be deleted or modified as you wish.

The "code" for these committees and groups can be any character on the key board with the exception of the "\*" which is reserved. Enter some character and then the name of the committee or group your are establishing.

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## Placing individuals into Groups and Committees

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Once these codes have been established you may enter individuals into them. This is done by opening either the "Place Individuals into Groups" or "Enter New Committeemen" section from the same dropdown list above. Select the individual and the committee or group into which you wish to place him from the combo boxes and then use the button on the screen to place him in the committee or group depending on which screen you have opened. A more detailed explanation can be found in the section entitled "Entering Groups and Committeemen" later on in the manual.

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# Changing Default Printer or FAX

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If you have only one printer and do not have either an internal or external a FAX/Modem connected to your computer you may disregard this section.

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## The Default Printer

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If you have more than one printer and/or a FAX/Modem connected to your computer you must select one of them as your “Default Printer.” The default printer is the printer which is selected each time you open any application. This is the printer to which all reports will be sent, normally. However there are exceptions to this rule which will be discussed below.

### Setting the Default Printer

To set the default printer you must get to the Control Panel in Windows and click on the printer icon. Then select the printer desired and set it to be the default. Consult your Windows manual for instructions or how to set the default printer.

### Temporally Changing Default Printer

Within this application you are allowed to temporally change the default printer. The temporary change will remain in effect until you close the application or temporally change is again. For the most part you will use the default printer to print your forms and reports.

### FAX

If you have a FAX/Modem installed on your system you can FAX any report you can print if desired. The computer looks not to a printer but to a file called a printer driver. These printer drivers set the parameters needed to properly format the information sent to the printer FAX/Modem also has a driver. This driver sets the parameters needed by the FAX/Modem and also launch the FAX software. Consult your FAX manual.

### Dot Matrix Printers

If you have more than one dot matrix printer drivers installed on your system and you use pin fed labels or receipts you will be prompted to select the desired printer automatically at print time. A window will pop up listing all the dot matrix printers (drivers) installed on your system. Make the selection and continue. The default printer selected above will be reset at the end of the print run.

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## Problems with some printers

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Some printers have problems with some forms, receipts and reports. Some Panasonic printer drivers do not properly increment mailing labels. One work around for this problem is to install an Epson printer driver and “fool” the computer into thinking it is printing to an Epson. If you have problems contact the printer manufacturer for the latest drivers or alternate drivers which can be used in place of those supplied with the printer.

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# The People Files

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## Things Common To All Files

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Click on the “Files” selection of the Menu Bar. A drop down menu will appear. Mouse click on file you wish to use. The selected screen will next appear. If there are no records in the file the Combo Box will be empty. If there are records in the file, a list of them will appear just below the combo box. You will also notice a series of buttons in the bottom left hand corner of the screen. These include “Notes, *Offices (Membership Screen Only)*, *Affiliations (Membership Screen Only)*, *Archive Data (Membership Screen Only)*, New Record, Save Record, Undo Edit, and Delete Record.

### Combo Box

If there are no records in the file the Combo Box will be empty. If there are records in the file, a list of them will appear just below the combo box. You will also notice a series of buttons in the bottom left hand corner of the screen. These include “ New Record, Save Record, Undo Edit, and Delete.

### New Record

Mouse click on the “New Record” button and then in the “Name” field. Enter the name in the format explained earlier in this manual. Press either Enter or Tab and enter the common name in the “Common Name” field as in the format explained earlier in this manual. Continue to enter information in each field.

### Full Name

Names must be entered in the following manner in order for the other sections of the program to handle the information properly. Enter the Last Name and any “Jr.’s” or “II’s” followed by a comma “,” then a space, the First Name, another space and the Middle Name(s). Do not use the initial as a substitute for the name in this field. Here are some examples: “Wilson, John William,” or “Wilson Jr., John William.” The program stores the name in this manner so that it may properly alphabetize the membership file and for use when printing official Grand Lodge reports where the full name is required.

***IMPORTANT: In addition to being used on all reports sent to Grand Lodge which require the full name this field is used to record important information such as the history of dues payments. It is VERY IMPORTANT that you enter the name as described above from the start. If you place an initial rather than the name in this field and later correct this error you will also have to go into the Dues History file and correct all entries made before your correction was made. Do it right in the first place and save yourself a lot of work later.***

### Common Name

***Note: A name must be entered in this field or the mailing labels and rosters will not print any name for the individual.***

This is for entering the informal name as it will appear on mailing labels, rosters, etc.. Enter first name first and last name last in this field or First Name, Middle Initial, Last Name, etc.. Example: John Wilson, John A. Wilson, Bill Wilson, etc..

### Address Lines

There are two (2) address lines provided. The second is for an apartment or space number etc. Note: An entry must be made in the first address field.

### City, State, Zip Code

Space is provided for an (11) digit zip code. If the last four numbers are unknown leave blank, it will not effect the operation of the program.

### Phone Numbers

Starting with the Area Code etc. The business phone has an extension field if needed.

### Date Fields

Enter the date of the event in the corresponding fields.

### Notes:

To enter Notes about this individual, mouse click on the “Notes” button. A pop up window will appear. Click in the upper left hand corner of the screen and enter any information about this person which you feel inclined to do. Click on close to close the window.

### Group Code

Any digit (0-9), letter (A-Z), or any other symbol such as the %, #, +, etc. may be entered in this field for each member. Up to sixty- eight different groups can be established When printing Mailing Labels for various membership file you, will be asked whether you wish to use a group code. However in order to use the codes they must be first entered in the Group Code table. Otherwise they will not show up as a selection when printing labels.

### Save Record

Click here at any time to save the record.

## Undo Edit:

This button will cause all changes made to the record on a particular screen to be undone and the original information restored. It is used to correct a mistake or inadvertent changing of a given field which is not desired. CAUTION: This button will not undo changes made to the record in any of the pop up windows. They each have their own Undo Button. If you close one of these windows, the information will be saved as it is at the time of the window closure. The Undo Button will only undo what has been changed on the screen or pop up window which is active at the time.

## Delete Record:

This button is self explanatory. It removes a record from the file. It should be used with caution as once a record has been removed it cannot be recovered. For the most part you will never have to use this button except to delete a record entered in error. The normal method of moving a member to a different file is done as described in the Archive Data section above.

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# Membership File Only

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## Important Date Information

There are specific reasons for entering the date information and it must be done properly for other sections of the application to work properly. Most are self explanatory. However the following three should receive your careful attention.

**Date Applied:** This is the date the member applied for membership in Masonry, *if an affiliate, date in his original Lodge.*

**Date Elected:** This is the date the member was elected to receive the degrees on Masonry, *if an affiliate, date in his original Lodge.*

**Affiliation Date:** This is the date the member affiliated with your Lodge if that is how he gained membership rather than taking the degrees in your Lodge.

**Note:** *It is imperative that you enter these dates in the proper fields. If you do not, the monthly reports generated by this application will not be accurate.*

## E-Mail Address

Enter the E-Mail address.

## Offices Button

Click on the Offices Button. Enter the year served in the various offices of your Lodge. If the member has served more than one year in a row, enter both or if several enter as 1955-72 etc. Always enter the earliest year if more than one. Example: If the Master served in 1973, 1988, and 1991, enter in that order; 1973,1988,1991, or 1973,88,91. This is necessary in order that the listing of the Pastmasters will be in proper order.

**Note:** *If you wish to list the Pastmasters of other Lodges who have affiliated with your Lodge at the end of the list of the your Pastmasters, press the "space bar" once and then type "Affiliated" in the field for Year Served As Master.*

## Affiliations

This button will cause a pop up window to appear into which you may enter the name of the various other Masonic organizations to which a member may belong.

## Archive Data

This button will cause a pop up window to appear into which you enter the date of Death, Dimit, Suspension or Expulsion. After this information is entered and the window closed the data on this member will be transferred to either the Archive or Suspension file.

## Life Member

Clicking on this button will open a window for entering the date the member became a life member and the amount of the fee charged.

## Hiram and Veteran Awards

Enter the Date for the various awards. There are three date fields for Veteran Awards. Two are recognized by Grand Lodge. One is provided for those Lodges that present awards for membership periods of less than 50 years. If your Lodge makes such an award enter the date of presentation. The other two dates are for the Grand Lodge 50 and 75 year Awards.

## Current Officer

If the member is an Officer other than the standard ones enter the office he holds. Example: Assistant Secretary, etc. Otherwise enter them from the Enter New Officers section on the opening menu.

## Wife's Name

Enter the first name of the wife of the member.

## Wife's Birth Date

Enter wife's date of birth.

## Anniversary

Enter their wedding date.

## Place of Birth

Enter member's place of birth.

## Occupation

You may wish to use his last for principal occupation if he is retired.

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## Archive File Only

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### New Record

Click on this button to enter a new record into the file. The close the combo box will close. The cursor will move to the Name field. Begin entering data.

*Note: A message box will appear on the screen with a message on it indicating that clicking on the "Other Data" button below it will allow you to enter information regarding Candidates Fees Forfeiture, the Expulsion of a Member of the Lodge and information relating to his status as a Life Member of your Lodge. This button will not appear at any other time than when entering a New Record. If the member being entered in the Archive File is either a Life Member, Candidate for whom dues were forfeited or a member who had been expelled, click on this button at this time and enter the date of the forfeiture of dues or the information requested regarding the expulsion from membership in Masonry.*

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## Candidate & Applicant Files Only

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### Membership #

Click on this field and enter the Membership Number supplied by Grand Lodge after you have sent in the report indicating you have initiated this candidate.

### 3rd Degree Date

When he receives his Master Masons degree click on this button and enter the date raised.

### Rejected

Click on this button to enter the date the Applicant was rejected for membership either by vote or objection to the Master of the Lodge.

### Wife's Name

Enter the first name of his wife.

### Anniversary

Enter their wedding date.

### Place of Birth

Enter his place of birth.

### Occupation

You may wish to use his last for principal occupation if he is retired.

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## Suspended File Only

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Click on the "Files" selection of the Menu Bar. A drop down menu will appear. Mouse click on "Suspended." The Suspended File Screen will next appear. /\*

### Restoration Date

Enter the date of restoration here when (if) the member is restored from suspension. This will restore him to membership. It will also place a sentence in the "Notes" section of his record indicating the dates of his suspension, restoration and the length of time in years, months and days. This is useful information when calculation time in service for veteran's awards.

### Penalty Raised to Expulsion

The use of this field is a rare occurrence. It is used *ONLY* if the penalty set at trial of "Suspension" be raised to "Expulsion" by action of the Grand Lodge. When a date is entered in this field the member will be placed in the Archive Section and you will be transferred to the Archive screen so that other information may be entered if necessary.

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## Sojourners File Only

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### Home Lodge

Enter the name of his home Lodge.

### Lodge City

Enter the city in which his home Lodge is located.

### Lodge State

Enter the State in which his home Lodge is located.

### Affiliated

Entering a date will cause the individual to be transferred to the Membership section should he be elected to your Lodge.

### Date of Death

When you enter a date in this field it will cause the record to be deleted from the file and make an entry in the Widows section if he has a wife.

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## Widows File Only

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### Husband's Name

Enter the name of her late husband

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# Entering Lodge Officers

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Lodge officers can be entered from the Main Menu only. Click on “Files” and then click on “Enter Lodge Officers.” This will load a pop up window. The purpose of this window is to allow you to enter, change or delete officers of your Lodge.

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## To Start a New Year

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At the beginning of a new Masonic year you should delete all officers and enter the new ones. To do this simply mouse click on the “Clear All Officers” button at the top of the screen. This will delete all officer designations from the files. You are now ready to enter the officers for the current year.

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## Entering New Officers

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Mouse click on the down arrow located at the right hand edge of the combo box marked names. Select the name of the officer desired by typing a portion of his name and then when it appears in the list, clicking on it. Next mouse click on the down arrow at the right edge of the “Officers” combo box. Locate the name of the office and mouse click on it. Follow this procedure until all the officers of your Lodge have been designated. Then close the window.

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## The Tiler and Organist

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The Tiler and Organist do not have to be members of your Lodge. All other officers must belong to your Lodge. If you Tiler and/or Organist are members of some other Lodge and you want them to appear in the List of Officers and have mailing labels printed at the time you print Officers labels, they must first be entered into the Non Member file.

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## Changing A Single Officer

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In the event of a change of office during the year due to a death or for any other reason you may delete the current officer and replace him with the newly appointed or elected member without having to reenter all of the officers for the year. To do this select the outgoing officer’s name from the combo box and then click on the down arrow on the “Offices” combo box. Scroll up to the top of the list if not already there. Select the “blank” record at the top of the list just above the “Master” and click on it. This will replace the name of the office with a blank record indicating that he no longer holds as office. Next, from the Name combo box select the name of the new officer. Then from the Officer combo box select the proper office and save the record.

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# Entering Committeemen and Groups

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## Committeemen

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From the opening screen click on “Files” from the menu bar and then select “Enter New Committeemen” from the drop down menu. A pop up window will appear with two combo boxes and three buttons.

### Begin a new year

To enter the committeemen for the ensuing Masonic year you first must clear the records from the last year. To do this simply click on the “Remove All Members form All Committees button. This will clear all records for the file. Next from the Member combo box select the name of the person to be appointed to a given committee. Then from the other combo box select the desired committee. Then click on the “Add Member to committee” button. The selected member has now been added to the selected committee.

At this point you may do either of the following. If other members are to be added to this committee select their names from the Members combo box while leaving the committee selection as is and click on the “Add Member to committee” button until all members of this committee have been added. Then select the next committee and add it’s members in the same manner.

You have the option of leaving the selected committee “live” and adding additional members or leaving the member “live” and adding him to different committees.

After each selection a list of the committees to which a given member belongs will be displayed in the box on the right side of the window.

### Remove a single committeeman

To remove a given member from all of his committee assignments as in the case of his having moved out of the area, select his name from the combo box and click on the “Remove this Member from All Committees” button.

*Note: Some Temple Boards allow members on the board who are not members of your Lodge. In the case of multiple Lodges sharing the same building or allowing members of other Masonic bodies meeting in the same building to sit on the board. In order that you may enter these individuals, should you wish to do so, first enter them in the “Non-Members” file so as to allow their name to appear in the combo box.*

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## Groups

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### Members, Candidates, Non Members and Sojourners

From the opening screen click on Files on the menu bar and select “Place Individuals in Groups.” Select the individual from the drop down list of the combo box. Next from the lower combo box, select the group into which you wish to place this member. Click on the “Add Member to group” button. The name of the group will appear in the window on the left side of the screen. Continue to add this individual to other group as desired or select a different individual.

### Widows

At present Widows can be added to groups only in the following manner. Open the Widows screen and enter the group code character for the desired group or groups into which you wish to place a particular widow.

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# Lists, Printouts and Index Cards

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Click on “Lists” on the Menu Bar and a drop down menu will appear with the following selections, “Lists Printouts and Index Cards” or “Rosters.” Click on Lists Printouts and IndexCards and select from the drop down menu. The listing for other than the major files have two print buttons which will appear at the top right of the screen. If you wish a printed copy or Index Cards simply click on the appropriate button.

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## Archive

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Click on this selection and a fly out menu will appear with the following selections, All Records or Range. If you select “All Records” a listing of all the records in the Archive file will appear on the screen. Selecting “Range” will cause another cause a pop up window to appear requesting you enter the first letter or as many of the letters of the last name of the members you wish listed. Click on the “OK” button and then enter the letter before which you wish the list to terminate in the next window. Then click on the “OK” button and the list will appear.

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## Candidates

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Click on this selection and a fly out window will appear with the following selections. All Candidates, Entered Apprentices, and Fellowcrafts. Make your selection and the list will appear on the screen.

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## Committee Codes

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Click on this selection for a listing of the Committee Codes and their corresponding descriptions which you have entered in the Committee Code Section.

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## Group Codes

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Click on this selection for a listing of the Group Codes and their corresponding descriptions which you have entered in the Group Code Section. Use the scroll bar or arrows to navigate through the list and when finished, click on the “Close” to return the underling screen.

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## Members

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Lodge Members may be listed in several manners. When this selection is made a pull down window will appear with the following options. Alphabetical, By Birth Date, By Third Degree Anniversary, Members Who’s Dues Are Not Current, Dual Members, Plural Members, and Suspended Members.

### 3rd Degree by Month

Select “3rd Degree by Month.” in the usual manner and then select the desired month by entering the number of the month desired. Example: 1 for January, 2 for February 3 for March, etc.. The lists for those members raised in the selected month will be produced starting with the first day of the month and running to the last. Use the scroll bar or arrows to navigate through the list and when finished, click on the “Close” to return the underling screen.

### Birthdays by Month

Select “Birthdays by Month” the choose “Members Only” or “Members and Candidates” in the usual manner and then select the desired month by entering the number of the month desired. Example: 1 for January, 2 for February 3 for March, etc.. The lists for those members raised in the selected month will be produced starting with the first day of the month and running to the last. Use the scroll bar or arrows to navigate through the list and when finished, click on the “Close” to return the underling screen.

### Committeemen

Select “Committeemen” from the drop down menu and a list of all the committeemen will appear on the screen. A Combo Box will be at the top of the screen. If you wish to list the members of a particular committee click on the down arrow on the right of the Combo Box and make your selection. Use the scroll bar or arrows to navigate through the list and when finished, click on the “Close” to close this screen.

### Delinquent Dues

Select “Delinquent Dues” from the drop down menu and a fly out menu will appear with the following selections, By Name, By Age, By Date Raised or Two years delinquent. The first three selections will list all of the members who do not have a current dues card will appear on the screen. The last selection, “Two years delinquent, will list only those two years in arrears. Scroll bar or arrows will navigate through the list.

## Dual Members

Select “Dual Members” and a list will appear on the screen of all of your Lodge Members who hold dual membership in other Lodges.

## Dues History

This section will produce a history alphabetically and then by date of the dues paid by each member since the file was last cleared. A Combo Box at the top of the screen will allow you to select a given member and list the dues history for that member alone.

## Dues Remissions

Selecting this option will cause a list of the members who have had their dues remitted by action of the Lodge.

## Hiram Awards

A list of the living Hiram Award holders will be sent either to the screen. The list will be in alphabetical order.

## Homes Contributions

This selection will cause a fly out menu to appear with the following options. By Amount and By Name. Make your selection and a list of the members contributing to the Masonic Homes Endowment Fund by name or amount contributed.

## Life Members

A list of the living Life Members will be sent to the screen. The list will be in alphabetical order.

## Officers of the Lodge

A list of the Lodge Officers will be produced in alphabetical order either to the screen or printer.

## Possible Veteran Eligibility

This listing is of members who were raised more than fifty years ago but who have not been presented with a veteran’s award. Possible reasons would be a suspension in the past.

## Members

This selection will cause a fly out menu to appear with the following options.

### **Alphabetically, By Age, By Date Raised, or By a Selected Zip Code, With Email Addresses.**

Make your selection and a list will appear. If you choose to list alphabetically or by a selected zip code, a list of the entire membership will appear and in addition this screen will have a Combo Box so that you may select to list by a selected group. Index Cards may be printed for individual groups. Click on the down arrow located at the right of the Combo Box and make your selection for the list. If you select By Selected Zip Code you may print a list or Index Cards for a given Zip Code.

## Affiliate Memberships

This selection will cause a fly out menu to appear with the following selections. York Rite, Scottish Rite, Shrine, and Eastern Star. Make your selection and the appropriate list will appear.

## Pastmasters

A fly out menu will appear with the following selections. Living and All. Make your selection and a list of all or of the living Pastmasters. The list of all of the Pastmasters will have a box to the left of the name. If there is an “x” in the box, it indicates that this Pastmaster is deceased.

## Plural Members

This selection will list the Plural Members of your Lodge.

## Wedding Anniversary

A pop-up window will appear. Enter the number of the month for which you wish to produce a list. i.e.. 1 for January, 2 for February, 3, for March ... 12 for December.

## Veteran’s Awards

A fly out menu will appear with the following selections. Special, 50 Year, and 75 Year. The “Special” selection is used in your Lodge has established an award of their own for less than fifty years of continual membership. Many have twenty-five or other time periods for awards given by the Lodge in addition to the Golden Veterans Awards of Grand Lodge.

## Wedding Anniversaries

Enter the number of the number of the desired month. 1 for January, 2 for February, etc.. This will produce a list of those members who were married in any given month. If you choose to print the list you will be prompted to reenter the month number.

## Wives' Birthdays

A pop up window will appear requesting that you enter the numerical equivalent of the month desired. 1 for January, 2 for February, 6 for June, etc. A list of those wives born in the selected month will be created on the screen. You may also print the list.

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## Non Members

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From the “Lists Section” select Non-Members, A list of those entered in the Non-Member file will be produced to the screen. Use the scroll bar or arrows to navigate through the list and when finished, click on the “Close” to return the underling screen.

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## Sojourners

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Making this selection will cause a listing of the Sojourners to the screen. Use the scroll bar or arrows to navigate through the list and when finished, click on the "Close" to return the underling screen.

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## Suspended

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Making this selection will cause a listing of the Suspended to the screen. Use the scroll bar or arrows to navigate through the list and when finished, click on the "Close" to return the underling screen.

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## Widows

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From the "Lists Section" select Masonic Widows. A list of those entered in the Widow's file will be listed on the screen. Use the scroll bar or arrows to navigate through the list and when finished, click on the "Close" to return the underling screen.

### Birthdays

This section will prompt you to enter the numerical equivalent for the month desired. 1 for January, 2 for February, 7 for July, etc.. You will then get a list on the screen of the Widows born in the selected month. You may print the list by clicking on the "Print Button". You will again be prompted to enter the number of the month.

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## File Statistics

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This section is reached only from the opening screen. Click on "Files" on the menu bar. Then select "File Stactics" and a screen will appear with a breakdown of the membership and other files.

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# Rosters

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Click on “Lists” on the Menu Bar and a drop down menu will appear with the following selections, Listings or Rosters. Select Rosters and choose the desired file.

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## Archive

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Click on “Archive” from the drop down menu and a fly out menu will appear with the following choices, “1 Column List”, “3 Column List”, “Within a Range” and Dimited Brother. Click on one of the first two choices to print all the names in the Archive file. Click on “Within a Range” and a pop up window will appear. Enter the letter or set of letters with which you wish to begin the list. Example; If you enter the letter “B” as the beginning of the list and the letter “D” as the end, the list will contain all the names beginning with the letter “B” and end with the last name beginning with the letter “C.” If you enter as the beginning of the search the letters “Smith J” and as the end of the search the letters “Thom” the list sill contain names ranging from the first person names “Smith” who’s first name began with the letter “J” and end before a with a last name that began with the letters “Thom.”

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## Candidates

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Click on “Candidates” and select the 1 or 3 column format to print the list.

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## Membership

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Click on “Members” and select the 1, 3, and 4 column format to print the list. You may also choose to get a list of names and phone numbers only or names and address all on a single line.

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## Non Members

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Click on “Non Members” and select the 1 or 3 column format to print the list.

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## Sojourners

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Click on “Sojourners” and select the 1 or 3 column format to print the list.

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## Suspended

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Click on “Suspended” and select the 1 or 3 column format to print the list.

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## Widows

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Click on “Widows” and select the 1 or 3 column format to print the list.

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## Full Data on Individuals

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### Single Individual

This section gives you the ability to print all of the information is the system on a given individual. You can select from the combo box the individual for whom you wish to print a record. This is useful when he joins another Lodge or Masonic organization or at the time of his death. The selection is made from individuals in all of the files with the exception of the non-members, sojourners, and widows.

### Entire File

There is also the ability to print the complete data on all individuals within a given file. Simply select the file you wish to print and the information of every individual within that file will be printed. This will take some time and a fair amount of paper as only two records will fit on a page. So if you wish to print the archive file and you have every member who ever belonged to your Lodge entered it could be a formidable task. Records may be generated for the Archive, Candidates, Members and Suspended files.

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# Forms and Reports

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This section is designed to print various Lodge and Grand Lodge forms and reports. It is divided into two main sections. The first includes the Blue Lodge and Grand Lodge forms and reports. The current Blue Lodge forms available are the Candidates Investigation form and the application for Golden Veterans awards. The Grand Lodge section includes Activity, both Gains and Losses, Death of Grand Lodge Members, and Dues Remissions. Others will be added as there are approved by Grand Lodge. The second includes rosters of the various files. These are printed in different styles and in the case of some of the files, by different criteria. This is explained below.

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## Blue Lodge

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### Applicants Investigation Forms

*Note: The applicant's name and other information must be entered in the "Candidate & Applicant" file before the investigation forms can be printed.*

To print the Applicant Investigations forms make this selection. A screen will appear into which the information regarding the applicant is entered. Select the Applicant from the combo box and enter the additional information requested in the various fields. There are four buttons in the upper right hand corner of the screen. These buttons are numbered 7, 9, 10, and 11. When selected they will cause a pop up window to appear into which the information contained for the corresponding questions on the application form filled out by the applicant. Enter the information here and then close the window by clicking on the bar at the bottom of the window. Move to the next button and continue as above. When all the questions have been answered click on the "Print" button.

*Note: You cannot edit the information contained in one of the pop up windows activated by the "number buttons." If you wish to change the information simply click on the button again. The window will reopen with no information displayed on the screen. Re-enter the correct information and close the window. If, by accident, you click on one of the buttons after entering information and closing the window nothing is lost. The information which you had previously entered is still there although it will not be displayed. Simply close the window and continue as if nothing has happened. Any change made here however will erase the previously entered data.*

### Certificate of Standing

This section prints a "Certificate of Standing" for a Mason when requested. After selecting the individual for whom the certificate is to be printed, fill in as much of the information as you can and click on the print button.

### Dimit Issuance

This section will print the "Dimit of a Master Mason" form issued to the member who has requested and been granted a dimit by your Lodge. *Note: You first must enter the dimit date in his record and then save the record in order to print this form.*

### Dimit Request

This section is used **ONLY** for Members of California Lodges. See C.M.C. Section 26050. **DO NOT USE FOR AFFILIATES TRANSFERRING FROM OTHER JURISDICTIONS.** This form **IS NOT** required when affiliate is retaining Plural Membership. This form properly filled out **MUST** accompany Applications for Affiliation presented for transferring **Membership** **WITHIN** the Jurisdiction of California.

Select the Member who has affiliated with your Lodge and who also wishes to dimit from the other Lodge to which he belongs and click on the Print button.

*Note: The member must have been elected to membership in your Lodge and the date of his affiliation entered in that field in his record before you print this request.*

### Letter to New Affiliate

Notification of election and letter of welcome from the Lodge Master to the newly elected affiliated member.

### Letter to Newly Elected Applicant

Letter of congratulations and notification of election to receive the degrees of Masonry to the newly elected applicant.

### Letter to New Entered Apprentice

Letter of congratulations to the new Entered Apprentice.

### Letter to New Fellowcraft

Letter of congratulations to the newly Passed Fellowcraft

### Letter to New Master Mason

Letter of congratulations and welcome to the new Master Mason.

### Letter of Appreciation to Homes Contributor

A letter of thanks to those who contributed.

## Letter of Appreciation to Committeemen

A letter of thanks to those who served on committees.

## Discontinuance of Multiple Membership

This form is used to notify other Lodges to which the member may belong that he has discontinued his membership in your Lodge. From the combo box select the name of the member. Enter the name, number, A. F. & A. M. or F. & A. M. if known and jurisdiction of the Lodge to be notified. Enter the date the discontinuance of membership became effective.

## Notice of Intention to Suspend (To Lodges)

This form is used to notify other Lodges to which a member may belong that he is about to be suspended for nonpayment of dues. Select the Member from the combo box in the usual manner. Next enter the name, number and either A. F. & A. M. or F. & A. M. if known and the Grand Jurisdiction of the Lodge to which the notice is to be sent. Enter the date of the Stated Meeting at which your Lodge intends to suspend the member should he not bring his dues current. Then click on the "Print" button and the notice will be printed. Do this for each such Lodge the Member belongs and then close the pop up window.

## Notice of Non Payment or Intention to Suspend

This form is used to notify the members of your Lodge who are not current in their dues and those two years in arrears that are about to be suspended. Enter the amount of your annual dues. Then enter the date of the Stated Meeting at which your Lodge intends to suspend them. Then click on the "Non Payment Notice" or "Intention to Suspend" button depending on which notices you wish to print.

## Sacred Roll

Select the name in the usual manner. Enter the offices held and years as there is room. Enter Masonic Awards such as the Hiram Award.

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## Grand Lodge

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**T**his section is used for the printing of various Grand Lodge Reports. The following are currently available. Activity, both Gains and Losses, Death of Grand Lodge Members, and Dues Remissions. Others will be added as there are approved by Grand Lodge.

### Activity

This selection will cause a pop up window to appear requesting you to enter the beginning and ending dates for the period to be covered by the report. After you enter these dates click on "Print Gains" or "Print Losses" and the selected report will be printed.

*Note: There are several categories of gains and losses. Only those categories for which there has been some activity will be printed. The form may look different each month.*

## Address Change (Members)

Prints a list of those members and candidates who have had a change of address if you chose to save the record at the time you entered the change.

## Amendments to By Laws

The By Law Amendments are found in this section. Clicking on the above selection will cause a flyout menu to appear with the By Law Amendment selections listed below.

### Amount of Dues

Prints the Certificate of Amendment to change your Lodge dues. CMC For more information consult Section 19040 Article IX - Dues

### Amount of Fees

Prints the Certificate of Amendment for the change of Lodge fees for the degrees and affiliations. You must enter both the new amounts and the old. For more information consult CMC Section 19040 Article VIII - Fees

## Charity Relief Amounts

Prints a Certificate of Amendment to change the amount the charity committee is authorized to give to a worthy brother. Enter the date of the vote taken in Lodge and both the new and old amounts. For more information consult CMC Section 19040 Article X - Committees

## Lodge Meeting Place

Prints a Certificate of Amendment to change the Lodge meeting place. For more information consult C.M.C. Section 16110.

## Lodge Name and Number

Prints a Certificate of Amendment to change the Name and/or Number of your Lodge. You must enter the old as well as the new Name and Number even if one remains the same. For example if your Lodge Name remains the same but the number changes due to a consolidation with an older Lodge you enter the Name in both the New Name and Old Name field. If the Lodge Name changes but the number remains the same due to any reason you must enter the Lodge Number in both the New and Old Number fields. For more information consult CMC Section 19040 Article I Name and Officers.

## Stated Meeting Day-Time

Prints a Certificate of Amendment to change to day and time of your Stated Meeting. You must enter the old as well as the new day and times of your Stated Meeting. An alternate day and time that the meeting will be held should the regular date fall on a holiday or during the Annual Communication of the Grand Lodge must also be entered. For more information consult CMC Section 19040 Article III Meetings of Lodges

## **End of By Law Amendment Section**

### **Death of Grand Lodge Member**

Select this report from the drop down menu and enter the beginning and ending date for period desired. Then click on the "Print" button and the report will be printed.

### **Dispensations**

This selection will cause a flyout menu with a selection of the following requests for Dispensation.

#### **Change Meeting Date**

This request for Dispensation is to hold your Stated Meeting on a different date than that specified in your By laws. The approval of the inspector is required and a reason must be given.

#### **Change the Meeting Location**

This request for Dispensation is to hold a Meeting on a different location than that specified in your By laws. The approval of the inspector is required and a reason must be given.

#### **Hold a Special Election**

This request for Dispensation is to hold a Special Election on a specific date. The approval of the inspector is required and a reason must be given

#### **Degrees for Servicemen**

This request for Dispensation is to Accept and Act on a petition for the degrees of Masonry received from mem belonging to the Armed Forces who do not possess the qualifications for residence. The approval of the inspector is required and a reason must be given

#### **Wearing of Masonic Regalia**

This request for Dispensation is to wear Masonic clothing and Masonic Regalia in public. The approval of the inspector is required and a reason must be given

## **End of Dispensation Section**

### **Dues Remissions**

Select this report from the drop down menu and enter the beginning and ending dates for the period desired. Then click on the "Print" button and the report will be printed.

### **Election Certificate**

This form is to be sent to Grand Lodge after the annual election of officers is held. Choose this option, select to appropriate elected and appointed officers for the ensuing year, fill in the address and phone number information and print the form.

### **Golden Veterans Award Application**

This section is used for filling out the information needed to apply for either a 50 or 75 year Golden Veterans Award. From the Combo Box select the desired member. Next enter the information on the screen and click on either the "Print 50 Year App." or "Print 75 Year App." button depending on which Award you are requesting. In the "Lodge Name field" enter the name of the Lodge only. (Ocean Park not Ocean Park Lodge) In the section where you enter his Masonic History use the full Lodge name and number (Ocean Park Lodge Number 369).

### **Hiram Award Order Form**

This section prints to Hiram Award Order Form. From the "Forms Reports" select "Hiram Award Order Form" and pick the member for whom the Award is to be ordered. Enter the date scheduled for the presentation and the number of the inspectoral district. Click on Print.

### **50 Year Presentation**

Fill in the information and click on the print button.

### **Pastmaster's Diploma order form**

Select the Master/Pastmaster. Enter the dates and print the form.

### **Widows Diploma order form**

Select the deceased Mason. Make other selections and print form.

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# Mailing Labels

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## Main Files

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Labels may be printed for a group of files or one file at a time. Click on "Regular Mailing" from the menu and select the file or files for which you wish to have labels printed. Select the files of files to which the mailing is intended. If you choose to print labels for two or more files, they will be merged into a single file for printing. If there are more than 200 pieces they will be sorted into postal bulk mail order, not by Zip Code. Check with the Post Office for sort regulations.

### Group Code

If you wish to print labels for a particular group do the following. Either before or after selecting the file or files for which you wish to print labels click on the "down arrow" at the right side of the Combo Box located near the bottom of the screen. A list of the groups you have entered in the Group Code Section will appear. Select the desired group and then click on the "Sort List" Button. The file will be built.

You can also exclude a group from the mailing by selecting that group from the "Exclude this group from mailing" combo box.

You may use both selections at the same time if desired. Example; only Local Members but exclude the Shut Ins.

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## Sort Code

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A sort code is printed in the upper right hand corner of each label This code is helpful if for some reason the mailing gets out of order after the label had been applied. The code represents the following: Numbers followed by "NC" destinations outside the United States. The letter "D ", Ten or more pieces where all five digits of the zip code match. The Number "3", Ten or more pieces with the first three zip code digits matching. The letters "A", Area Distribution Centers with ten of more pieces. The letters "MS", left over pieces.

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## Printing

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To print labels click on the "Pin Fed" or "Sheet" button.

### Labels for Laser or Ink Jet Printers

If you choose "Sheet" you will be given a choice of three different sizes. One three across and ten down or thirty to a page with no bar code. The other two print bar codes and are either two by seven (14) to a page or two by ten (20) per page. These labels can be purchased

in most office supply stores. Most labels will work however I have included the Avery Part Number for each size in package size. The most economical method is to purchase the 500 sheet size. Depending on the label size you get from 700 to 1500 per package. See the information on Page 3 under "Things You Will Need" for label size and Avery numbers.

### Dot Matrix Printers

There is only one label size which will operate properly with dot matrix labels. The information may be found on Page 3 under "Things You Will Need."

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## Correct Paper Jam

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In case of a paper jam or if you run out of labels it will be necessary to restart the label printing process. This section is designed to allow you to pick up where you left off. Select "Correct Paper Jam" form the Mailing Labels drop down menu. Enter the number in the upper right hand corner of the label without the code letter or number. (D, 3, S, or MS). Example: If the code in the upper right hand corner is D 125, enter only 125. If it is MS 314, enter only 314. Click on either "Pin Fed" or "Sheet" to finish printing the labels..

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## Special Occurrence Labels

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### Delinquent Members

Prints mailing labels for all members who are not current in their dues payments..

### Delinquent Members notice to suspend

Prints mailing labels for all members who are two years in arrears in their dues payments.

### Officers, Pastmasters, Hiram Award or Golden Veterans

Select one of the categories listed to the left and mailing labels will be printed for those members who are either Officers, Pastmasters, Hiram Award holders or have received their Golden Veterans Award depending upon the selection.

### Members in a Selected Zip Code

Open this screen and enter the desired Zip Code. Select the label size and mailing labels will be printed for all Members in that Zip Code.

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# Dues Section

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This section allows you to enter both Dues Payments and Home Contributions at the same time or individually. First you must enter the "Default Dues Expiration Date." This date will be 12/31/XXXX where XXXX is the year for which the current entries will expire.

*Note: Normally you should not receive contributions to the Masonic Homes Endowment Fund. However there will be times when you do. When this occurs enter them as explained below. If the check is made out the Lodge you must deposit it and then make out a separate check to the Fund and include it with the Transmittal Report explained on page 17. If the check is made out to the Fund send it along with the Transmission Report. Send in all contributions on a monthly basis.*

## Dues Payments and Contributions entered at the same time

From the Combo Box select the name of the member. If the dues are to be remitted move the mouse to the "Remit" box and click. Otherwise enter the Check Number and the Amount of Payment. Enter the Receipt Number. The expiration date and the date entered will automatically be entered. **Press the Enter key.** (If you move the cursor to the "Save Payment" button without pressing the enter key you may have to click twice to save the record.) Click on the "Save Payment" button. Move the mouse to the "Current Contribution" field. Enter the amount and click on the "Save Contribution" button.

*Note: In order to save both the Dues Payment and the Contribution, should both have been entered, you **MUST** click on **BOTH** the "Save Payment" and the "Save Contribution" buttons separately. Failure to do this will result in one of the entries being lost.*

## Dues Payment without Contributions

After entering the Default Dues Expiration Date, select the desired member and proceed as described above but without entering or saving any contribution item. Then click on the "Save Payment" button **ONLY.**

## Contributions without Dues Payment

After entering the Default Dues Expiration Date, select the desired member and proceed as described above but without entering or saving any dues payment. Then click on the "Save Contribution" button **ONLY.**

## Override Amount or Expiration Date

When you enter the Dues Receipt Number the current date will appear in the "Date Entered Field", the date entered in the "Default Dues Expiration Date" and "Default Payment Amount" you entered at the top of the screen will be entered in the appropriate fields. From

time to time it may be necessary to override these default entries. If you are recording a payment for a past year while also recording several current payments you can highlight and overwrite the amount and date in these fields. When you enter the next payment the current default expiration date will again appear.

## Correct Name of Delete Dues Record

With the scroll bar at the right hand side of the window move to the record which contains the error. Highlight the entire record by clicking in the gray square at immediate left side of the desired record. Press the Delete key on the keyboard. If you have not already done so, return to the payment entry section and make the proper entry. In a case where you have made a duplicate entry simply delete one of them.

*Note: In the case where you have changed a members name (Wilson, John W. to Wilson, John William) the dues payment records will now contain entries for both "names." You must change the "W." to "William" in the Dues History file otherwise the computer will not list his entire history. This section will allow you to make edits to his name only.*

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## Dues Receipts

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The dues receipts for regular members are printed all at one time. There are two types of receipts in use. Those printed in continuous forms and on single sheets. Receipts will print in alphabetical order for all members in the file with the exception of the Life Members should you Lodge have Life Members.

## Print Dues "Amount Owed" Labels

Enter the requested information and print the labels that are to be affixed to the "Dues" portion of the two part Dues/Homes Contribution envelopes supplied by Grand Lodge.

You may wish to print a run of the mailing labels for the membership file in alphabetical order and keep them with the receipts.

## Regular Receipts

*Note: Laser, Ink and/or Bubble Jet printer must use the new four to a page forms Grand Lodge supplies for these printers. Check with the Grand Lodge Supply Office.*

*Note: Ignore the combo box. See "Correct Paper Jam or Printer Problem" below for explanation.*

Click on “Dues” and then on “Regular” and a pop up window will appear with the name of your Lodge, your Lodge Number and the name of the Lodge secretary. There are also boxes into which you must enter the date of expiration, (this would be 12/31 or the year for which the receipts are being printed) and the amount of your annual dues. Next click on the button for the format you wish to print.

#### 4 Per Page Blank Regular Receipts

It may be necessary to print a receipt for a new member either by affiliation or the raising of a candidate during the year. Print the new four to a page Blank format for this purpose. It will print a set of four receipts with no name or other information on it. Then fill it in.

### Life Members

Click on “Dues” and then on “Life” and then select either “Sheets” or Pin Fed” and a pop up window will appear with the name of your Lodge, your Lodge Number and the name of the Lodge secretary. There are also a field into which you must enter the date of expiration, (this would be 12/31 or the year for which the receipts are being printed) . Next click on the “Print Receipts” button and the receipts will be printed.

Note: Because the printer will always begin the printing with the upper right hand receipt in necessary that you begin the printing process with an unused sheets at all times.

#### 4 Per Page Blank Receipts

It may be necessary to print a receipt for a new member either by affiliation or the raising of a candidate during the year. Print the new four to a page Blank format for this purpose. It will print a set of four receipts with no name or other information on it. Then fill it in.

### Update Life Member’s Expiration Date

Click on this option and enter the new expiration date (12/31/XXXX) for life member’s dues receipts. This will update the information in each life members file to the date entered in the field on the pop up form.

### Correct Printer Jam or Printer Problem

If you have a printer problem and not all of the receipts printed go to the combo box and select the name of the Brother who follows the name on the last receipt that printed properly. The printing will begin with this Brother and continue until the end of the list. This paragraph applies to both regular and life member receipts.

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## Continuous Form Receipts Alignment

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When using continuous form receipts either for Dues or Life Membership. There is a procedure you should follow which is dictated by the nature of the programming language in which LODGEiCAL was written. There is a quirk which will not allow the printing of any continuous forms that are not in either hole or half inch measurements. As all three receipts are 2.33 inches tall the program must be fooled into thinking it is printing three receipts on a single form which is 7 inches tall. Therefore when you are printing an alignment test the program will print a series of X’s on the top receipt and then skip the next two and stop one what will be the fourth one, ready to have you make any adjustments before printing another test or continuing with the print run. I suggest that if the X’s did not print in the proper location on the top receipt that you back up the forms and realign them at the second receipt and print another test and so on until you have them properly aligned. At this point you can note where some reference point is on the receipt in relation to the current unprinted receipt and back up the next two to that same position and start the print run or you may start the run from where you are, voiding the two unprinted receipts. Sorry for the inconvenience but it is not as complicated as it sounds.

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# Check Book Section

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This section is used for tracking the Lodge expenses and income as well as keeping a file on any fixed assets owned by you Lodge. It is not a General Ledger although incorporates a Chart of Accounts. That is the only similarity. Accountants would roll over in their grave at the fact that you are able to delete an entry made in error rather than make a corresponding correcting entry. They would demand that you have an understanding as to which accounts are Debits and which are Credits, and why some Assets are Debits while others are Credit accounts. They would require that you understand when “add” to a debit and subtract from a “credit” and at others do just the opposite. I thought it would be better if I stuck with a simple method. Hence the following, with apologies to the members of the American Institute of Certified Public Accountants.

## Chart of Accounts

First you must enter an account number and description for each area where you will have an expense and each source of income. The numbering system you use for this is up to you. (Again with apologies to the accountants) This system may be as simple or as complicated as you wish. You may have a single expense account for all committee activity or you may wish to have a separate account for each committee so as to track the expenses of the “Widows Night” and the “Annual Steak Fry” etc. as individual accounts.

There is at least one area where you will have both an expense and income account for the same item. Contributions to the Masonic Homes show up as income when donated and as an expense when sent to Grand Lodge. Therefore you need a COA entry in both places.

## Making COA entries

From the drop down menu under “Bank” on the menu bar select “COA Expense ...” and a pop up window will appear. Enter an account number and description for each area of expense you wish to track. Some are necessary such as Grand Lodge expenses. Here again you may be as creative as you wish. You may lump all Grand Lodge expenses under one heading or break them down into several such as Per Capita Tax, Forms, Candidates Fees, etc.. Once entered you may establish a budget for each account. As an example you will establish an account for the rent your Lodge pays to the landlord, in most cases the Temple Association. Enter the amount of the annual expected rent in the Budget column and move on the next account until all have been entered.

Next select the “COA Income ...” and follow the same procedure for the areas from which income will be derived.

## Reconciled Beginning Bank Balance

***It is imperative*** that you enter a “Reconciled” Beginning Bank Balance for the checking account. The figure you should enter here may

not be the one indicated as the ending balance on your December bank statement. ***It should be an amount adjusted to reflect what the ending balance would be as of January 1 after all outstanding checks written during the last have been deducted.***

Each year should start out fresh with no outstanding items from the previous year in order to properly reflect the income and expenses for that calendar year. ***This is not a Bank Account record.*** You have your bank statements for that purpose. This figure is used so that your financial statements will properly reflect the years financial activity.

## Entering Checks

From the drop down list under Bank on the menu bar select “Enter Checks ...” A pop up window will appear. Enter the date, the check number, the amount if the check and to whom it was paid.

Next from the Distribution combo box select the account for which the payment was made and enter the amount. In most cases this will be the same amount of the check. However this will not always be so. An example would be if your Junior Warden purchased some refreshments and while out also picked up some letterheads from the printer and stamps from the Post Office. You could write him one check and “spread” the various amounts to the three different accounts.

## Optional Description field

After selecting the account to which the payment is to be credited the check number and account number in the distribution section will automatically be filled in by the application. You must enter the amount. However you may also enter an optional description for each spread item. The following are two examples:

1. Your Junior Warden purchased some refreshments for an officer’s practice and also picked up some printing and postage. You enter the date, check number, total amount and his name in the upper section. In the “Distribution” area you select “refreshments”, “printing” and “petty cash” and enter the individual amounts for each totaling the amount of the check. In the optional “Description” field you enter, “Officers Practice” under the refreshment distribution item, “Steak Feed Flyer” under printing distribution item and “Postage” under the petty cash distribution item.

2. Here is another method you might use. Say your Widow’s Night committee had a \$500.00 budget. After entering the check number, etc. you select the “Widow’s Night” from the combo box and enter \$150.00 and in the optional description field enter “Flowers”. Next you again select “Widow’s Night” and enter \$125.00 for “Refreshments” and lastly you choose “Widow’s Night” again and enter \$125.00 for “Entertainment” which totals the \$500.00 spend.

There is no need enter anything in the optional description field. However when you do a detailed print out of the check book you will have the advantage of knowing where each item was allocated.

### Reviewing and/or deleting a check

From the combo box at the top of the window entitled “Select Check” click on the down arrow on the far right hand side and select the check desired. You may edit or delete the entire transaction from this point. If you choose to delete the entry click on the Delete Check button at the bottom of the window. This will remove the check and all entries made in the distribution area related to this transaction. You may then reenter the check with the proper information is desired.

### Reconciling Checks

After selecting a given check as indicated in the paragraph above you may click on the “Reconcile” box to indicate the check has cleared your bank.

### List Checks

Select “List Checks” from the drop down menu. A list of the checks will appear on the screen which may be printed. You may also reconcile the check which have cleared your bank from this form.

### Print Check Detail

This selection will send to the printer a detail breakdown of each check with the date, account numbers and optional description (if used) for each check in the file.

### Print Expenses

Two method are available. A summary and detail listing of expenses by Chart of Account Number. The summary will give only the total amount expended for each account. The detail will list each transaction effecting the account with the date, amount and optional description if used.

### Enter Income

From the Bank drop down menu select “Enter Income” and a pop up window will appear. From the combo box select the account desired. Next enter the date and amount and optional description if desired.

Example: Say you selected to enter the income from the Application Fees paid by a candidate. You would select “Fees” (which would have had to have already entered. See “Chart of Accounts” above) and enter the date and amount. You may then, if desired, enter the name of the applicant in the optional “Notes” field.

If you have more income to enter make another selection from the combo box and proceed as before.

### List Income

This selection will list to the screen the income activity by account number. Also you may print either a summary listing by account which will give account numbers, names and totals or a detailed listing. The detailed will list account numbers, names and a breakdown of each entry along with the date, amount and optional notes if used along with a total for each account and a grand total of all income.

Use this printout along with the Expense Report for making financial reports to the Lodge.

### Budget and History

Lists to the screen and to the printer a report of the current budget, the year to date expenses and a history of the expenses over the past three years. Lists either by the COA number or account name.

### Fixed Assets

This section is for entering all of your fixed assets. These include, but are not limited to, Certificates of Deposit, saving accounts, value of Lodge building, paraphernalia, etc. Click on the “Add New Asset” button and enter an account number, a description or name or the account and value for your fixed assets. Example;

087-6787-098	Western Savings CD	10,000.00
100	Lodge Paraphenalia	2,500.00
200	Stock in Temple Ass.	375,000.00
123-456	B of A Saving Acct	5,000.00

### Print Financial Report

Making this selection will print a report indicating the beginning balance of the checking account, all expenses listed by account number, a total of all expenses, all income listed by account number, a total of all income, all fixed assets with their value, a total of the value of all fixed assets and a grand total or net worth.

*Note: If you have not entered any fixed assets the report will return an error for the total worth of the Lodge.*

### Begin a New Accounting Year

This section should be used at years end after all entries both income and expenses have been made and all reports for the current year have been printed. It will clear out the current budget, expense and income amounts so that you are ready to begin a new accounting year. *You must reenter the “Reconciled Bank Balance” to begin a new year.*

At the same time it “ages” the previous years activity. The current budget, expense and income amounts are moved to “last years” records. This is done each time you run this section. After using the program for a period of time you will be able to compare the budget, expense and income over a four year period. This will give you a history for the incoming officers to help in establishing their budget for the coming year.

**IMPORTANT: Only run this section once a year.**