Support for the MMS system is:

**MMS:** Masonic Membership Solutions

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

**Grand Encampment of Knights Templar Commanderies**
Phone: (713) 349-8700  
Administrator: John Elkinton  
Email: john@gektusa.org
When logging into the system for the first time please take the time to read the Important Messages.

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

MMS/YRIS is supported within a PC:Windows (Versions 7 – 10) environment running the Internet Explorer browser.

**NOTE:** Only Internet Explorer (IE) is supported as the base Browser at this time. We are currently addressing the issues within our software.

In ALL versions of Internet Explorer (IE) you must be in COMPATIBILITY VIEW Which is set within Tools from the Menu Bar.

**Windows 10 Users**

MMS/YRIS works in Windows 10 with the IE 11 Browser. Windows 10 comes with IE 11 and Edge installed but IE 11 is hidden by default. Follow the link below for instructions on adding IE 11 shortcut on your Windows 10 machine.

[Click here for Windows 10 instructions](#)

**MAC Users**

Mac users you should either move to a PC with Windows or move to software that can be loaded onto the Mac that provides you Windows and Internet Explorer (IE) functionality. Today there are two such products – Parallels and VMWARE Fusion both will support Windows and IE on the Mac.

While we are in the process of becoming Cross Browser compatible make sure to log into Internet Explorer with **Compatibility View.** This is set from within Tools from the Menu Bar.
Secure Log In

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 to link to the secure login page.

IMPORTANT MESSAGES TO USERS —— please read:

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Request Access

How does one request access:

URL: www.masonic-web.com
(1) From the URL address select “Register for new User Account.”
   - Complete the form < click Create User >
(2) You will receive e-mail to validate email address.
   - Validate address then < click Request Access >
     (can also be done through URL)
   - Complete “Request Access” Form < click Submit >
(3) You will get email from Admin who either approves or disapproves your request.
(4) If approved go to URL and log in - complete Disclaimer.

Once the request comes in:

- Knights Templar – GEKT will contact the Grand Recorder to receive approval
- All others not Knights Templar – The MMS support team will contact the Grand Recorder/Secretary to receive approvals.
Access is assigned in two BASE User Groups:

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

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

- N = National
- S = State
- L = Local

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

<table>
<thead>
<tr>
<th>National</th>
<th>State</th>
<th>Local</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knights Templar</td>
<td>ALL</td>
<td></td>
</tr>
<tr>
<td>AMD-Grand Council</td>
<td>ALL</td>
<td></td>
</tr>
<tr>
<td>Blue Lodge</td>
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</tr>
<tr>
<td>Royal Arch Masonry</td>
<td>ALL</td>
<td>ALL</td>
</tr>
</tbody>
</table>

Note: If anything is incorrect please contact System Administrator

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

- Because of this the User can always change that email address that is assigned to his ID by clicking on Administrative / User Profile / User Profile Update from the home screen.
This will bring up the user id's personal profile and from there the user can update at that time.

<table>
<thead>
<tr>
<th>User Profile Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Name: jgroth</td>
</tr>
<tr>
<td>First name: John</td>
</tr>
<tr>
<td>Last name: Sample</td>
</tr>
<tr>
<td>E-mail address: <a href="mailto:manager@yris.us">manager@yris.us</a></td>
</tr>
<tr>
<td>Primary Phone</td>
</tr>
<tr>
<td>Secondary Phone</td>
</tr>
<tr>
<td>□ International Number</td>
</tr>
<tr>
<td>□ International Number</td>
</tr>
</tbody>
</table>

[Save] [Cancel]
User ID's

- When logging in you enter the incorrect **UserID** you will get a message
- When logging in if you have the correct ID but **wrong password** you will get a message

**Login**

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

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

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

- Everything in the database is stored at a N S L structure
  - N – National
  - S – State
  - L – Local

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

This is the People Record containing the members Profile data:
System Rights

Training is available:

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

Who can have access to the system for Knights Templar:

- The normal process for access to MMS is given to the following Sir Knights:
  
  **View Only Rights**
  - Grand Encampment Current Officers
  - Grand Encampment Department Commanders
  - Other Committee Chairman as requested – approved by Grand Encampment.

  **View Only Rights** – if requested and approved by the Grand Recorder:
  
  - Grand Commander
  - Deputy Grand Commander
  - Grand Generalissimo
  - Grand Captain General
    
  - Other special access if requested
    - Voluntary Campaign Chairmen
    - Membership Chairmen
    - Regional / District / Divisions – Representatives within a state

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

Who can have access for other Masonic bodies:

**Edit Rights:**

- All Grand Recorders / Grand Secretaries
- Local Recorders / Secretaries with approved access by the Grand Recorder / Grand Secretary
- All others with approval from the Grand Recorder / Grand Secretary
Individual members in the Knights Templar wanting to update their profile data can do that at any time.

- This is done by going to the GEKT web site http://www.knightstemplar.org/
  - Within the pulldown “Information” will be a selection for “MM Solutions”
  - Or at the bottom of the home window clicking on
    - “MM SOLUTIONS UPDATES”

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

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

The MMS membership number is obtained from all dues cards generated from the MMS System.
Masonic Membership Solutions

Member Information

Prefix  Name
John D Sample

Preferred First Name  Birthday

Contact Information

Home Phone  Work Phone  Cell Phone

Home Email  Work Email

Personal Information

Employer  Job Status

Job Title

Spouse's Name  Spouse's Birth Date  COT (Companion of the Temple)

Children's Names

Like: Billy, Sally, Megan

Home/Primary address

Address is Certified

Country  USA
Type  Home/Primary
Address  1101 Business Pkwy S
City  Westminster
State  Maryland
Zip  21157 3066

Alternate address

Address is Certified

Country  USA
Type  Alternate
Address  PO Box 1044
City  Westminster

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

Knights Templar Magazine
Members with foreign addresses will not receive USPO direct mail copies but the Knights Templar monthly magazine is always available online at www.knights templar.org. Members may also "opt-out" of USPO direct mail delivery below, but can always view the magazine on-line at the above URL.

- Send the monthly magazine with the following supplement: Alabama
- No thanks, I do not need a copy mailed to me. At my leisure, I will go online to view the magazine.

### Memberships, Status & KTEF Sponsorships

<table>
<thead>
<tr>
<th>Member#</th>
<th>National</th>
<th>State</th>
<th>Local</th>
<th>Status</th>
<th>KTEF*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1499973</td>
<td>Knights Templar</td>
<td>Alabama</td>
<td>2 - Mobile</td>
<td>Candidate</td>
<td></td>
</tr>
</tbody>
</table>

*KTEF key: LS-Lift Sponsor, P-Patron, AP-Associate Patron, GCC-Grand Commanders Club, GMC-Grand Masters Club

If you see any issues with your membership please contact your local Recorder
To Change your screen size you would click "ViewItem Size". 

If you need to Change your Port Size you will be taken to the screen below.

"Most" YRIS screens can re-size themselves to use whatever ViewPort size you select. The larger your viewport, the more information you can see . . . without needing to scroll. How big your ViewPort can be, depends on your screen's Physical Size.
If at anytime you need to change your screen size this is where you would choose to do so.

Change - Default Window Size

Current window’s size: 1899 x 907
Physical screen size: 1920 x 1080

Change your ViewPort size to Width 1,238 Height 865

Set to maximum suggested

<table>
<thead>
<tr>
<th>If your physical screen size is:</th>
<th>Suggested Width</th>
<th>Suggested Height</th>
</tr>
</thead>
<tbody>
<tr>
<td>1024 x 768</td>
<td>990</td>
<td>665</td>
</tr>
<tr>
<td>1152 x 864</td>
<td>1114</td>
<td>748</td>
</tr>
<tr>
<td>1280 x 720</td>
<td>1238</td>
<td>623</td>
</tr>
<tr>
<td>1280 x 768</td>
<td>1238</td>
<td>665</td>
</tr>
<tr>
<td>1280 x 800</td>
<td>1238</td>
<td>693</td>
</tr>
<tr>
<td>1280 x 1024</td>
<td>1238</td>
<td>887</td>
</tr>
<tr>
<td>1360 x 768</td>
<td>1315</td>
<td>665</td>
</tr>
<tr>
<td>1600 x 1000</td>
<td>1547</td>
<td>866</td>
</tr>
<tr>
<td>1600 x 1200</td>
<td>1547</td>
<td>1039</td>
</tr>
<tr>
<td>1800 x 1440</td>
<td>1740</td>
<td>1247</td>
</tr>
<tr>
<td>1920 x 1200</td>
<td>1856</td>
<td>1039</td>
</tr>
<tr>
<td>1920 x 1440</td>
<td>1856</td>
<td>1247</td>
</tr>
</tbody>
</table>
User Name and a way to View your profile Information which shows your access rights.

Email: manager@MMS1.us   Version 3.9.00

4 sections contain individual task – all are pull downs

- **System** – shows you different system categories
- **Reports** – provides 5 base sections to run reports
- **Administrative** – administrative tasks
- **Help** – contains user guides & documentation
Each of the 4 sections shown on the home screen contains different information.

- **System** – shows you system tasks
- **Reports** - provides 5 base sections to run reports
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- **System** – shows you system tasks

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

- **Organization**
  - **Maintenance** – allows for updates to be done to the National, State or Local body information based on your access rights.
- **Reports** – shows you all the different categories which contain reports.

- **Member** – provides a list of all the reports that are available at the member level.
Masonic Membership Solutions
User Guide

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

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

- **Voluntary Campaign** - Knights Templar Only

  - **KTEF Comparative Campaign** – shows campaigns side by side.

  - **KTEF Campaign Activity** – the base report for all contributions that are received during a campaign.

  - **Contributions by Fiscal Campaign** – shows you by Commandery where the funds were credited.
- Contributions - Knights Templar Only

- Contributions by Body – shows all contributions posted to an individual body within a specific date range.

- Contributions by Source Code – shows all contributions within a date range based on source code assigned to the individual contribution.

- Contributions by Fund & Jurisdiction – shows all contributions within a jurisdiction based on a date range and fund allocation.
• Misc. - Knights Templar Only

- **KTEF Exemptions Roster** – shows by jurisdiction the KTEF Exemptions for Active/Inactive as of a specific date.

- **LS/P/AP/GC/GM Percentages** – shows by jurisdiction the percentages based on active members for each program.

- **Life Sponsor 100% Roster** – shows by jurisdiction those local bodies that are currently at a specific percentage range.

- **Grand Master/Commander Report** – shows by jurisdiction the Grand Commander and Grand Master Clubs held by individual members, and for Grand Commanders Club the current accrued amount applied to the club.

• Dues - Knights Templar Only

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

- **Activity Modification Log** – shows by jurisdiction the individual activity that has been done to each member and who did it.

- **Annual Return** – runs the Annual Return based on a date range, and provides a summary of the numbers and supporting data for each of the return categories.

- **User Access Report** – shows by jurisdiction within a date range what users have rights and the last time logged in and if they have made any changes.

- **Active Local Bodies** – show by jurisdiction the number of local bodies in the system.
• **Administrative** – shows you all the different administrative functions available to you as a user.

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

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

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

  - **Recorder / Secretary Signature Form** – used by local recorders and secretaries so that their signature can be applied to the dues cards.
- **Help** – gives you the ability to review User Guides and current and archived documents.

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

- **User Guides** – Searchable PDF Guide.
Member Search

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

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

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

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

- Along with Name or Number search you can limit it by where the member lives.
  - Hint – not something to be using on initial search.

- In the search area is a special section for those National Bodies that seem to have their own National Number.
  - Currently only KTP

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

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

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

• Selecting “Prior” allows you to change the order of the pulldown from most recent to alpha order.

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

- The FOUND area will tell you how many records it found.
- Using the pull down on the right of the yellow bar will display all the records found.
By selecting the name you would like to look at will bring up the full Profile data for this member.

<table>
<thead>
<tr>
<th>Membership types used:</th>
<th>Regular</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Date of Birth: 1/1/1900</td>
<td>☑ 2023-07-27</td>
</tr>
<tr>
<td>Birth Location:</td>
<td>☑ Sacramento</td>
</tr>
<tr>
<td>Date of Death:</td>
<td>☑ 0000-00-00</td>
</tr>
<tr>
<td>- Edit, Save, Cancel -</td>
<td></td>
</tr>
<tr>
<td>Gender:</td>
<td>☑ Male</td>
</tr>
<tr>
<td>Spouse's Name:</td>
<td></td>
</tr>
<tr>
<td>Spouse Birth Date:</td>
<td></td>
</tr>
<tr>
<td>- □ COT (Companion of the Temple) -</td>
<td></td>
</tr>
<tr>
<td>Children:</td>
<td></td>
</tr>
<tr>
<td>Job Status:</td>
<td>Current</td>
</tr>
<tr>
<td>Employer:</td>
<td></td>
</tr>
<tr>
<td>Job Title:</td>
<td></td>
</tr>
</tbody>
</table>

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

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

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

**Tip in Search:** Many times when you are doing a search a member is really on the database but spelled differently, this results in adding duplicates to our database. To prevent this many times you do not need to completely type out the members name. Example: Robert W. Armstrong - you can locate this by just "Ro" as first name and "Arms" as the last name. This will bring you back a list of possible members, from the list just search through, if you get too many then increase your search by adding additional characters. Also note a space for “State of Residence” is provided but not normally needed and should only be used if you need to narrow down the search which normally this can be accomplished in the name fields.

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

**Example 1** - is what is returned if a match has been found.

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

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

Once the record is selected you will need to select the “National” body from the pull down, because this pull down is controlled by your permissions in many cases it will be defaulted based on these permissions.
After you have selected the national body based on your permissions the state and local body will be defaulted. If you have state permissions you must select the “Local” body you want to add the membership to.

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

After you have Selected Status and clicked on "Continue" the system will do a double check on the body you are appending (adding) this membership to, and if the system finds any members that are a potential match based on the last name it will list them and ask you to confirm that this member is not already in your local body.
If you find that this membership is already in the local body click "Cancel". If you have done a double check and you want to continue to add this membership click "Continue & Save record". Once you have clicked "Continue & Save record" the Member Add Orders screen will appear. At the top of this screen is the member’s current orders with dates and the location where they were taken. These are for information display only and only those with permission to that Local body can change the date and or location, so if you see a mistake please let your Grand Recorder or System Administrator know.

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

This pull down for “First Line Signer” may not have all members going back in history or if you do not know who signed it, you can select "Unassigned".
Note – the First Line Signer pull down table only contains members within the local body that the membership is being added to, it displays the names in three colors:

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

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

Once you have selected “Save” in the previous screen you will be taken back to the Edit Status screen, which will confirm everything has been added as you have entered it.
Example 2 - No Match

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

If it has been correctly keyed click on:
"I would like to ADD a new person and membership to the database".

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

If it has been correctly keyed click on: “I would like to ADD a new person and membership to the database”.

OR

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

If all the data is correct and you CANNOT find the member below in the list of matches click the following:
"I would like to ADD a new person and membership to the database".

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

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

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

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

To USPS Certify click here
Once you have clicked “Continue” from the previous page your next step is to select the “National” body from the pull down, because this pull down is controlled by your permissions in many cases it will be defaulted in based on these permissions.

<table>
<thead>
<tr>
<th>National</th>
<th>State</th>
<th>Local</th>
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<tbody>
<tr>
<td>AMD-Grand Council</td>
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<tr>
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<tr>
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<tr>
<td>KTP - Grand College</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Royal Arch Masonry</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>National</th>
<th>Grand Commandery</th>
<th>Commandery</th>
<th>Select Status</th>
<th>Born 01/01/1979</th>
<th>Member# 6001013</th>
</tr>
</thead>
</table>
Note: If you select: (The examples below show Knights Templar, the verbiage will change based on the body)

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

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

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

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

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

If you find that this membership is already in the local body click "Cancel". If you have done a double check and you want to continue to add this membership click "Continue & Save record"
Because you have selected “Petitioner/Candidate” status option you will be taken to the Add Orders screen to enter the dates. If you have all orders you may enter them all at one time but it is required that you MUST enter “Petitioner” date and the “First Line Signer”.

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

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

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

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

Order of the Red Cross
Order of Malta
Order of the Temple (Knighted)

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

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

Current Date of Birth Listed: 01/01/1900, Change Date of Birth to: 1/1/1900

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

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

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

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

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

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

At any time prior to selecting "Save" you can click on "Reset" this will erase all your information entered but will keep you on this window, or if you select "Cancel" it will cancel out of everything you have done and back you out of this screen.
Once you have selected “Save” you will be taken back to the Edit Status screen, which will confirm everything has been added as you have entered it.

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

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

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

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

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

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

Once you have selected “Save” you will be taken back to the Edit Status screen, which will confirm everything has been added as you have entered it.
If you want to edit an existing Members Status you first must search for the record by Name or Membership Number. To Find a member begin by either clicking on the logo (top left) or click on "System then Membership"and select "Find a Member" sub menu.

Begin by entering the members name or member number.

**Tip in Search:** Many times when you are doing a search a member is really on the database but spelled differently, this results in adding duplicates to our database. To prevent this many times you do not need to completely type out the members name. Example: Robert W. Armstrong - you can locate this by just "Ro" as first name and "Arms" as last name. This will bring you back a list of possible members, from the list just search through, if you get too many then increase your search by adding additional characters. Also note a space for “State of Residence” is provided but not normally needed and should only be used if you need to narrow down the search which normally this can be accomplished in the name fields.
After searching the database the system will return records matching what you have entered. The number of results will be displayed on the left. To display the entire list of results, click on the down arrow icon on the right hand side of this highlighted box.

The list of results will appear showing Member Name, Birth Date, and Address. Note: Red records are deceased members.
Click on the member line in the results grid, this will automatically select the record and link all his data into the Member Profile screen. On the left side will be the base core functions which are linked to your permissions.

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

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

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