

# ASSISTANT SECRETARY

## QUICK START GUIDE

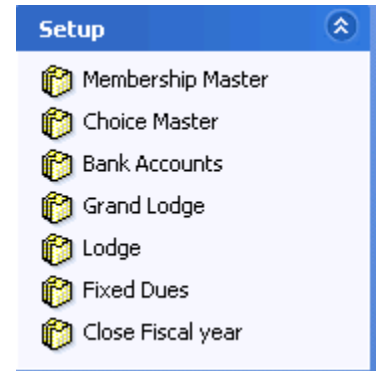
### Setup

The most important stage of the entire process is setting up your database correctly. Even if you don't like reading manuals, we highly recommend you read this Quick Start Guide in order to understand the different aspects of the program.

### Setup Sections

In order to setup the program correctly, we recommend you setup the sections in this order:

1. Grand Lodge
2. Lodge
3. Bank Accounts
4. Membership Master
5. Choice Master
6. Fixed Dues
7. Note: We intentionally left out Close Physical year; it is covered in the manual



### Grand Lodge

Enter your Grand Lodge information.

### Lodge

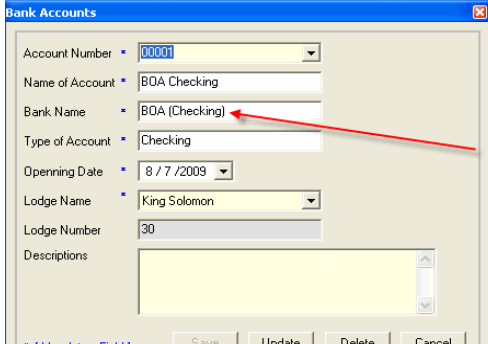
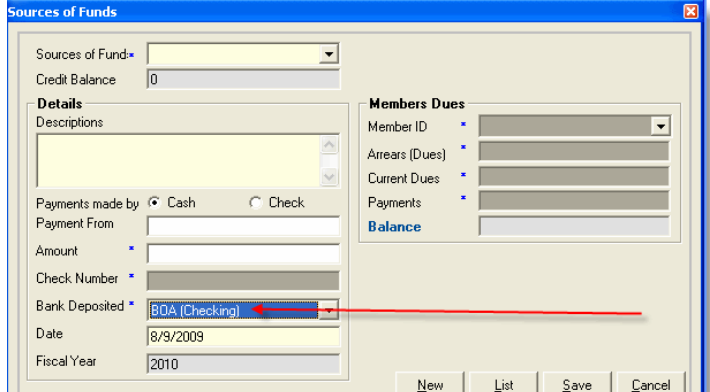
Enter one lodge or many lodges. If you are the Secretary of one Lodge, you would enter that Lodge. If you are the secretary of two Lodges, you can enter both Lodges. In the members Info field and several other places in the database, the program allows for lodge separation (i.e. you can print/email letter to all or by Lodge).

### Bank Accounts

Enter your bank account details. Do you need to enter the account number? No, but you should ensure you are able to recognize the account. The field most used is "Bank Name." In the screenshots below, you can see different ways of entering accounts. For example, if you have several accounts with Bank Of America, you do not want to name the "Bank Name" as BOA. If you have checking and savings accounts, you can name them "BOA Checking" and BOA Savings".

- Account number – Bank account number
- Name of account - if your bank does not name accounts or if you only have one account you can put checking or savings in this field
- Bank name
- Type of account - checking/savings
- Opening date
- Lodge name
- Descriptions

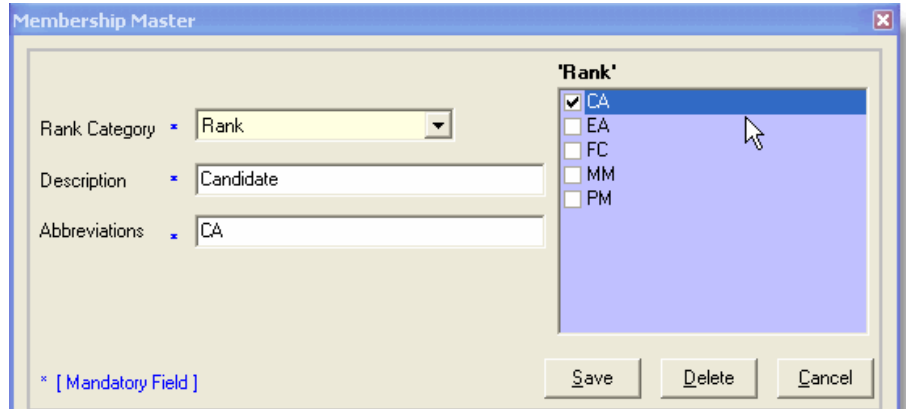
"Bank Name" in setup appears in accounting as "Bank Deposited."

A screenshot of the "Bank Accounts" setup window. It features several input fields: "Account Number" (00001), "Name of Account" (BOA Checking), "Bank Name" (BOA (Checking)), "Type of Account" (Checking), "Opening Date" (8/7/2009), "Lodge Name" (King Solomon), "Lodge Number" (30), and "Descriptions". A red arrow points to the "Bank Name" field. At the bottom, there are buttons for "Save", "Update", "Delete", and "Cancel".A screenshot of the "Sources of Funds" setup window. It includes fields for "Sources of Fund", "Credit Balance" (0), "Details" (Descriptions), "Payments made by" (Cash), "Payment From", "Amount", "Check Number", "Bank Deposited" (BOA (Checking)), "Date" (8/9/2009), and "Fiscal Year" (2010). A "Members Dues" section is on the right with fields for "Member ID", "Arrears (Dues)", "Current Dues", "Payments", and "Balance". A red arrow points to the "Bank Deposited" field. At the bottom, there are buttons for "New", "List", "Save", and "Cancel".

## Membership Master

Membership Master has three choices assigned:

1. Membership Status. Regular (REG), Home Bound (HB), 25 year Masons (25Y), etc. **The membership status is very important since it ties with fixed dues.** In other words, later in setup, you will assign fixed dues to each member status. When you are creating a member profile, you will be asked to assign that member a membership status. Once you do, the dues for that year are automatically assigned
2. Rank. EA, FC, MM, etc.
3. Seat/Office. WM, SW, JW, etc.



Membership Master

Rank Category \* Rank

Description \* Candidate

Abbreviations \* CA

\* [Mandatory Field]

Rank

- CA
- EA
- FC
- MM
- PM

Save Delete Cancel

## Choice Master

Choice Master has five choices assigned:

1. Item Category. Tied to inventory. Assign the categories for each item you want to inventory.
2. State. You can add or delete a state/province. You can place the states you work with most in this section. You can put full name or abbreviation for state. Place "SC" (for South Carolina) in the description and click save. In the right hand window SC will appear. **We recommend a two-letter abbreviation for all states.**
3. Type of petition. From the petition info section (under members).
4. Sources of funds. Money coming into the Lodge. Includes member dues and donations. **Do not change member dues' name**
5. Uses of Funds. Money going out of the Lodge

## Fixed Dues

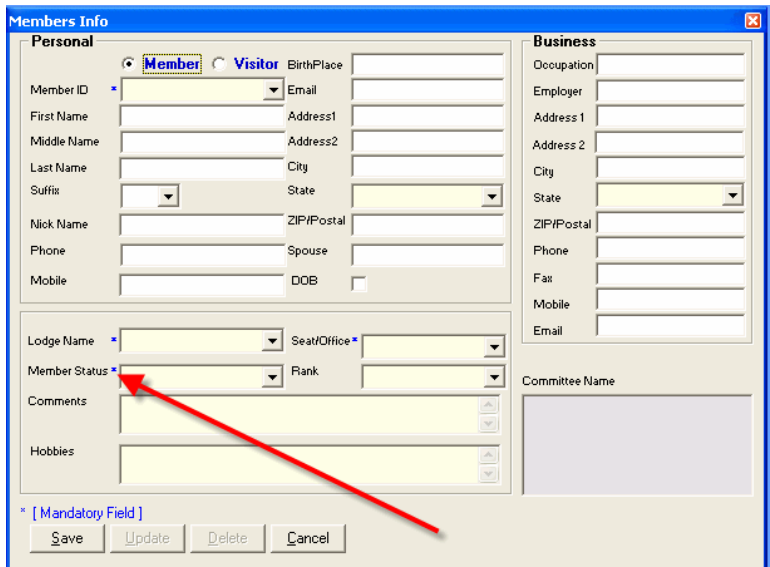
Fixed dues are setup for use in the accounting section, member dues. You add the dues choices in the Membership Master > **Membership Status**. Once you start inputting data under members, you will see the membership status block you must assign each member (see screenshot). From here dues are automatically entered into the accounting section, member dues.

## Ready to Add Members

Now that setup is completed, you are ready to add members to your database.

To add members:

1. Click on "Contacts"
2. Click on "Members"
3. Click on "Members/Visitors"
4. Enter your information
5. Support: <http://www.MasonicSoftware.com/support>



Members Info

Member ID \* [Mandatory Field]

First Name

Middle Name

Last Name

Suffix

Nick Name

Phone

Mobile

BirthPlace

Email

Address1

Address2

City

State

ZIP/Postal

Spouse

DOB

Lodge Name \* [Mandatory Field]

Member Status \* [Mandatory Field]

Comments

Hobbies

Business

Occupation

Employer

Address 1

Address 2

City

State

ZIP/Postal

Phone

Fax

Mobile

Email

Committee Name

\* [Mandatory Field]

Save Update Delete Cancel

**We recommend you read the Assistant Secretary help manual for other beneficial information**