BENEVOLENT AND PROTECTIVE
ORDER OF ELKS

Chicago Lodge Management System

CLMS ABRIDGED MANUAL FOR SECRETARIES

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Benevolent And Protective Order Of Elks
2750 N. Lakeview Avenue
CHICAGO, IL 60614

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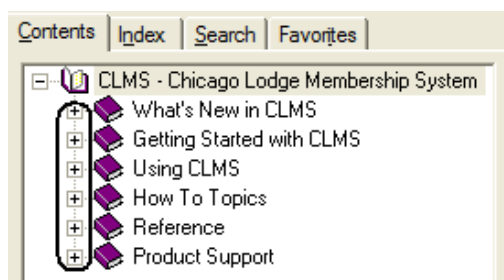**Key word:**

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🖥 Using the CLMS

Help Features

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Like many common computer programs CLMS, has a help system built in so that you can get help on specific topics

On the Help Menu located along the top row of menus, select the menu option **"Help"** , then from the drop down menu that appears select the [Help...] that is shown on the drop down. You will be presented with the CLMS Online Help window, which contains four tabs that can be used for searching and organizing your help topics.

Contents – tab which graphically displays a list of Topics that can contain related sub topics? The main topic is **"CLMS – Chicago Lodge Membership System"** which contains all other subtopics. To view subtopics simply click on the plus sign that is to the left of any topic.

Index – tab is where you can supply the keyword or type what you suspect a keyword is into a text box. As you type topic keywords will appear that match what you have entered. You may then browse from the list and select some keyword that you think may take you to the topic you're looking for.
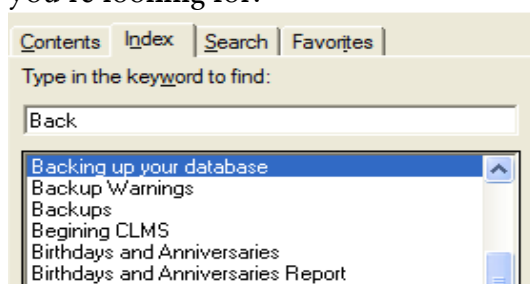
Search – tab allows you to type in a word then click the **"List Topics"** button and all topics that contain this word will be listed below. You may then click one of the titles listed below then click the **"Display"** button to view the selected Title.

Favorites –tab allows you to store a found topic you think may be needed again and store it to your favorites. With the desired topic showing you can click on the **"Favorites"** tab click the **"Add"** button to add to your favorites list, **"Display"** to display from your favorites list or click on the **"Delete"** button to remove it from your favorites list Keep in mind that your favorites will not be saved between versions of CLMS.

Changing Login Password/Security Button

Chapter

2

CLMS offers the user the ability to change the default username and password

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H I N T S

Key word:

💻   Security

Try: using the keyword **"Security"** to get detailed information on changing your password and setting up other users in CLMS.
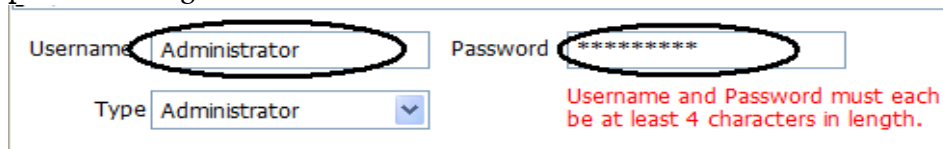
Located on the left hand side of the CLMS Members Edit screen is a tool bar containing the **"Security"** button. Click this button to make changes to user/security options, such as changing the administrator's password, adding other users or deleting users. Keep in mind that you must have administrator capabilities to make changes to the security settings. Also you must change the default password for the Administrator Account before you will be allowed to add other administrator/staff users.

Types of users available

Administrator - Only Administrator level users can make changes to records and information stored in CLMS. You may want to create another Administrator so that you can assign privaledges to someone that needs to make changes to the information in the database, but still have the ability to remove this user if it is no longer needed.

Staff – Level user can only review data in the database and run reports but is unable to make changes to the data contained in CLMS.

Changing the Administrator password – Click the **"Security"** button to view security settings. You will be presented with a screen showing a table with the Administrator user and type. Below this table you will see boxes identified with **"Username"** and **"Password"** with the type **"Administrator"** selected. In the boxes next to these identifiers you can type the user name you want to use the default user name is **"Administrator"** simply delete what is there and type what you want to change it to. Make sure you take care to write these changes down somewhere so that you do not get locked out of CLMS. As indicated passwords must be 4 characters in length, upon changing a password asterisks will appear hiding what you have typed, don't worry if there appears to be more asterisks than what was typed. The number of asterisks does not reflect the actual password length.
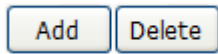

Adding a User – Once you have changed the Administrator password as required for adding new users, you will have the ability to create additional users of either an Administrator or Staff level

Notice the **"Add"** and **"Delete"** buttons on the upper right hand portion of the **"Security"** Screen. Click the **"Add"** button, a new user will appear below the "Administrator" user in the table. The default user will be of the **"Staff"** type, you can keep this as is for a user that requires only read access or you can click on the **"Type"** dropdown located below the table and change the type to **"Administrator"**. You must now assign a password for this user by typing a password into the password field.. Click the **"Apply"** button then the **"OK"** button save your user and password changes. Conversely you could have clicked the **"Delete"** button if you wanted to remove this user, make sure you are not deleting your only **"Administrator"** user.

Lodge Settings and Setting up Lodge Dues

H I N T S

Key word:

⌨ Lodge Settings
Screen

Lodge Settings Button: *Takes you to the Lodge Settings screen where you can provide information pertaining to your lodge including dues and fees, enter information such as Secretary and Exalted Ruler names as well as other lodge information. Information contained on this screen is organized using text boxes, buttons and color coordinated tabs so that you can easily locate and modify any lodge specific information.*

Located on the tool bar thats on the left side of the **"Members Edit"** screen is the **"Lodge Settings"** button. Click this button to view the **"Lodge Settings"** screen. You will be presented with a screen that contains text boxes, for entering information tabs for other specific data and buttons on the bottom for speecific functions. Each piece will be covered briefly so that you can understand how to use these useful features.

Main Lodge Settings Screen – First thing you will notice on the **"Lodge Settings"** screen are a group of fields used for setting up your current year information. Some of this information will probably remain the same such as **"Lodge Number"** and **"Lodge Name",** however these fields can be updated as needed.

Buttons along the bottom of the Lodge Settings screen. You will notice two a row of buttons along the bottom of the **"Lodge Settings"** .

"Help" – to enter the built in help system and obtain assistance with any help topic

"Emails" – used to email from within the CLMS application.

"Email Settings" – to configure the **CLMS** application to work with email provider such as gmail and yahoo. See **Chapter 5** on **Configuring your email settings.** Note that Email Settings must be set prior to using any of the emailing options within CLMS.

Fields Incuded on this main screen:

"Elk Year Begins April 1", to be updated each year after successful submission of your annual report and a letter from the Grand Lodge letting you know what your starting number will be.

"Number of Reported Elks", **"Number of Life Members"** – to be updated from your annual report or as instructed by the Grand Lodge.

Jurisdiction District" – the district number that your lodge is assigned with.

"Exalted Ruler" and **"Secretary"** – Updated each year these fields are used on various reports and forms thorugh out CLMS.

"Lodge Mailing Address" – from top to bottom Lodge Name (Syncs with Lodge Name in Membership screen defaults) , Address line1 zip code, city name

"Member screen defaults" – Lodge Name (Syncs with Lodge Name in Lodge Mailing Address), City name, State code, zip plus 4, carrier route.

"Lodge Phone Number" – that gets used on various forms such as transfers and demits.

<u>Tabs Found in Lodge Settings Screen 2 columns Next Year and Current Year:</u>
"GL & SA Assesments" – **"GL insurance",** fees charged to each member for the Grand Lodge Insurance for both regular and life members.. **"GL Per Capita"** – fees paid by each member to the Grand Lodge *(use only the amounts that Grand Lodge tells you, don't use any other amounts for GL insurance or GL Per Capita).* **"State",** fees paid for the State Assoiation for your lodge. **"Other 1" and "Other 2"** – Fees charged by the lodge for each member for purposes desginated by the Lodge.

"Lodge & Opt Dues" – Dues paid by each member to the lodge for regular and life members, for both Next and Current years. There are also two buttons on this tab **"Manage Chart of Accounts"** and **"Optional Dues"**
- Manage Chart of Accounts button is used to set properties or create a predesignated list of accounts that a member can pay optional dues towards.
- Optional Dues – You can select from chart of accounts that has been setup, so that a member can pay optional dues towards a specific chart of accounts.

"Initiation Fees" – Initiation fees determined by your lodge
"Other Fees" – Reinstatement Fees and Affiliation fees as determined by the Lodge ByLaws
"Cards & Dues" – Where you can enter what appears on your memberhip cards for both line 1 and 2. There is also an optional message that can be printed on your dues statements, such as reminders, notes and other information, you wish to communicate via your dues statements.

H I N T S

Key word:

⌨ Other Settings Tab

"Other Settings" – Has numerous settings that you can use to customize defaults for you lodge. You can setup default backup location, Intelligent Barcode setting, set overrides for life membership requirements, decide what titles should appear on your standard mailings and printouts and clear information for officer, committees and GL shipping addresses.
- **"default drive to use for local backups",** whether to use **"Intelligent Barcode Settings – IMB",** and specify the **"3 digit Service code"** and **"6 digit Mailer ID (assigned by the USPS)"** that is used to createe the IMB barcode on your mailings.
- **"Overrides for life member consideration"** –change the defaults for **"Minimum years as an ELK"**, **"Minimum Age"** requirement and **"Min consec years"** as an ELK
- **Check boxes for Title options,** the default is to not include any titles on memberhip cards reports and labels, however this can be changed by checking the box next to **"Include Check box titles"** option, you can then exclude specific titles as you desire. **"Elk Titles"** are included on all printed materials for a member if you wish to not have anything print fro "Elk Titles" then you must remove from the text box on the **"Mebers Edit"** screen.

There are also three buttons on this tab good idea to backup your database when using any of these so that you can recover if you have un-intended results. .
1. **"Deselect ALL Officers"** – Useful tool for deselecting all officers from your membership so that you can assign new officers.
2. **"Delect ALL Committees"** – Will remove all committee assignmets from all records so that you can make new assignmets for the current year.
3. **"Clear GL Mail/Ship Adrs"** - Will clear all GL Mail and GL Ship addresses from every record in the database.

Backup and Restore of CLMS

Chapter

4

H I N T S

Key word:

🖥️   Backups

Backups: *CLMS provides the user the ability to backup and restore the entire database and it's settings in two ways. You may backup and restore either locally that is to a drive on your local computer or you may backup and restore to Grand Lodge Offsite server.* ***Either way it is very important that you backup your CLMS program on a regular basis***
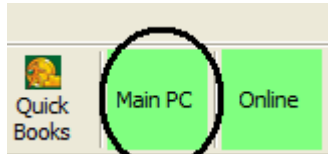
Your computer must be setup as the **"Main PC"** so that you can perform offsite backups. To change from **"Main PC"** to **"Not the Main PC"** simply click the button with either identification. **If you do not do this, you will not be able to backup to the Grand Lodge web site.**

Backing Up your CLMS database: Located on the **"File"** menu of the CLMS **"Members Edit"** screen select the **"Backup"** option or you can hit the **"F11"** function found on the top most row of keys on your key board.

💾 **Backup**   **F11**

You will be presented with a screen **"Create backup copy"** with several options. The 1st thing you should notice is the default location for your local backups which should be **"C:\BackupCLMS",** this can be changed by manually typing in the box or clicking on the ellipses button and browse to another location.

On this screen you will also be presented with an opportunity to send backups offsite as well, there will be a check box identified with **"Additionally send backup offsite to GL offsite server"** if this option is grayed out then you must designate this computer as the **"Main PC"** by clicking the **"Not the Main PC"** button 1st before you will be allowed to perform offsite backups.

Offsite Backups: Because your backups will overwrite what is on file with the Circulation department, it is important that you read the warning message that appears **"Go to the elks.org website now to check for postal notifications?",** by clicking the **"Yes"** button you will be taken to the elks.org page where you will see changes that may need to be made in your CLMS program prior to performing the offsite backup.

IMPORTANT: You will need an elks.org **"Secy"** user and **"Password"** to both view circulation changes and to send a backup off site. Make sure that you have both of these prior to attempting to do an offline backup or restore from a backup offline as well. Also your elks.org profile should show that you are the lodge secretary.

H I N T S

Key word:

💻   Restore Lost Data

Restore of CLMS: *Now that you have been keeping regular backups, restoring from these backups are is relatively simple. You can restore from a local or remote backup just as you were able to create backups to these locations.*

Special Note: If you are restoring from a backup that comes from an earlier version of than what your are restoring to you will need to do the section on **Repairing your database**, *this is especially true if you find that you are missing some reports after restoring from a backup.*

Restoring from a backup: Located on the **"File"** menu of the CLMS **"Members Edit"** screen select the **"Restore",** option to ░ **Restore** get to the **"Restore data from backup copy"** screen **.**

On this screen you can now choose to restore from a local backup or after providing your Secretary's elks.org website password you can choose to restore from an offsite backup.

When restoring from a local backup you can either enter the location and name of your backup or you can click on the ellipsis ⬚ next to the box identified with "Backup copy" it should leave you in the folder with the ⬚ local backups, you can select from one of the backups you have listed there. The backup files are named in the following manner

- a preceding identifier "bkup"
- followed by your lodge number
- an underscore "_"
- a date in the form of digits only "09032009" and an underscore "_"
- military time "1300" for 1pm, "0900" for 9am and so forth
- "v" and the version of CLMS that the backup was created with
- and finally the "zip" extension.

For example a backup for lodge 3 on September 3rd, 2009 at 9AM using version 1.321.201 of CLMS would have a file "bkup0003_09032009_0900v321.zip". Select from the list of backups then click the **"OK"** button.

You will see the file you selected appear in the box under **"Backup copy",** once you do click the **"Restore"** button to restore from this backup. You will be prompted to confirm that there are no open documents and that you truly wish to restore click the **"Yes"** button for both of these prompts. **CLMS** will shut down and restart after the restore has been completed.

Repairing your database: As mentioned earlier if you have completed you're restore and are finding that there are some reports missing that use to exist prior to the restore or certain functionality appears to have gone away, you will have to perform the repair function of the install process.

Locate the install icon on your desk top or you can download the latest version from the website
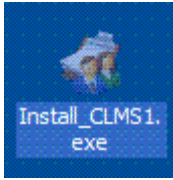
Once the installation offers the option select the **"Repair"** option to fix any abnormalities.
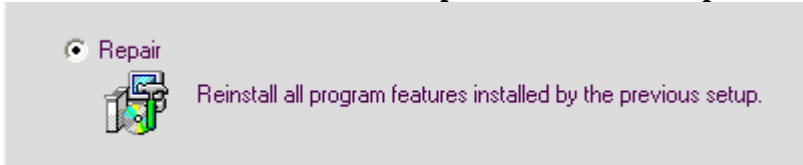
Configuring Your Email Settings

Chapter

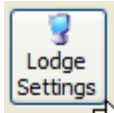**5**

H I N T S

Key word:

🖳   Configuring Email

Email Settings: *Located on the Lodge Settings screen along the bottom, is a button called "Email Settings". By clicking this button you can configure CLMS to work with your email provider if they allow the use of SMTP or MAPI mail* clients.

Click the Lodge settings button located on the Members Edit screen. Once in the Lodge Settings screen you will notice the third button from the bottom left of this screen is **"Email Settings"**. Click this button to enter your email settings for CLMS.

Configuring for MAPI client.
- Send via SMTP or MAPI box should have **"MAPI"**
- Port should be blank along with the text box for **"SMTP Server"**
- No user name or password is needed
- Options for "TLS" and "SSL" should be unchecked
- Supply a **"def sender"** typically your email address
- You may provide a **"def bcc"** which can be any valid email address to send a blind carbon copy.
- **"Bulk Mail Delay"** is the number of seconds you wish to set between emails so your correspondence does not get flagged as SPAM by the recipients email provider

Configuring for SMTP client
In contrast SMTP requires more information in order to work with **CLMS**
- **"Send via SMTP or MAPI"** should be set as **"SMTP"**
- **"SMTP Server"** should reflect the required server name as specified by your email provider, for example gmail's smtp server is **"smtp.gmail.com"** you must visit your specific email provider to find out which it is for yours
- **"Port"** number is also designated by your email provider (for gmail it is **"587"**)
- **"Bulk Mail Delay"** you can specify the amount of time in seconds that you want to delay sending between emails. This helps to prevent your correspondence email from being flagged as SPAM by the receivers email provider.
- **"My outgoing server requires authentication"** usually checked but is also dependent on your email service.
- **"Username"** typically your email in some cases you do not need to fully qualify the "@yahoo.com", you must find out from your provider for gmail the user name is fully qualified like <u>username@gmail.com</u>
- **"Password"**, supply the password that you use to access your email normally.
- **"def sender" and "def bcc"** – Fields are used to supply what you wish displayed in the **"From:"** field of your email most typically your email account used in the previous user name. **"def bcc"** – can be used so that you can send a blind carbon copy to some other

valid email this field is optional and only if you wish to send to another email without it being shown to any of the other email addresses you are sending to.

- **"use TLS" or "use SSL"** – one of these options should be checked and is dependent by your email provider. See keyword **"Configuring Email"** in the online help system for some common email provider settings.

Make sure you click the **"Save"** button once you are done configuring your email client.

Adding Candidates and other record types

<div style="float:right">**Chapter** **6**</div>

H I N T S

Key word:

- 💻 Adding Members
- 💻 Adding Lodge Records
- 💻 Adding Advertiser Records
- 💻 Adding Afilliated Members
- 💻 Adding Candidates
- 💻 Notes on Member Number

Adding Records: *The main function and purpose of CLMS is to allow you to enter, maintain status, make changes to your lodge membership and other lodge related information. The process can be a little confusing initially but adding records has been standardized from one record type to another.*

Update Mode - C(A)ndi
Selection Filter CAND
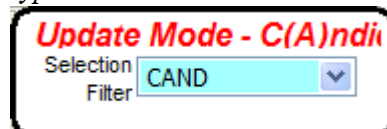
On the main **"Members Edit"** screen change the selection filter to the type of record you are attempting to add. All member records in CLMS start out as **"CAND"** candidate records first, and then it can later be made into a regular member record. **CLMS does** offer many other record types to choose from when adding records. Each record type found in the **"Selection Filter",** has it's own unique prefix for example a candidate record starts with a letter "A", a widow/widower record starts with "W" and so forth the exception is a member record which drops the prefix and has a unique 6 digit number assigned. To see other prefixes used in CLMS type in the keyword **"Notes on Member Number"** while in the **"CLMS Online Help".** Once you have set the selection filter to the type of record you wish to add you must then click the **"Add"** button on the toolbar located on the left hand side of the members edit screen. You will then be provided with messages that will guide you with entering an appropriate number for the type of record you are adding. Please note there is no correlation between a candidate's number and the member number that gets assigned to a candidate upon his/her status change to a member. All numbers assigned to any record type must be unique.

Creating a Candidate Record: When creating a new candidate record you will need to enter the following information listed below.

- **"Number"** – a unique five digit number preceded with the letter "A" example A12345
- Current Address information on the **"Cur Mail"** tab of the address fields
- **"Birth Date"**
- **"Orig Init Lodge"** which contains the lodge he/she is applying membership to or the lodge the candidate is coming from.
- **"Proposer"** – Name of the person proposing this candidate
- **"Occupation"** - Simple description of the candidates work/type i.e. "Retired", "Lawyer" or some other discrition
- **"Birthplace"** – "Chicago", "Los Angeles" any description of the location.

Later you can supply the: *These dates can be entered as they are completed.*

- **"Proposed Date"** – the date the candidate is officially proposed for membership.
- **"Invstgtd"** –date the candidate's investigation was completed.
- **"Elected"** - date that the candidacy was voted on

- **"Indoctrinated"** Date –date a candidate was indoctrinated into the lodge, approved for entry into the lodge as a member (not actually a member yet)

To make a candidate a member: With the candidate record showing on the **"Members Edit"** screen select the new member type from the list of available types from the drop down located to the right of the **"Number"** field.

Most common type is **"New Elk by Initiation"** however there are other options available such as **"Transfer Dimit into this Lodge", "Absolute Dimit from this Lodge"** and a few more. See **Chapter 8-Making a Candidate a member** *for more details on types of ways that a candidate can be made a member.*

Initiating a new member: Once you have selected the method for creating a member such as **"New Elk by Initiation"** you will then be prompted for information about this transaction.
- **"Initiated Date"** – the date the candidate was or will be initiated.
- **"Initiation Fees"** – Some or all of the initiation fees can be entered at this time
- **"Partial Dues Payment"** – All or some of the dues for membership can be entered at this time.
- **"Permanent Number"** – a 6 digit unique membership number should be entered for this new member.

Navigating records in CLMS

Chapter

7

Navigating Records: *CLMS allows for several ways of navigating records in your database. You can simply browse from one record to the next or look for record within a record type.*
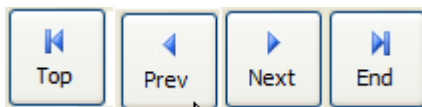
Selection Filter: The selection filter is one of the most commonly used methods to restrict what records you are working with. You will note that to the right of the selection filter is a number. This number represents the number of records of the current "**Selection Filter**" type. For example when the "**Selection Filter**" is set to "**ALL**" you will see all records regardless of type in this case there are "**570**" total records. **Keep in mind that what your selection filter is set to will determine what records you will see while navigating the database.**

Basic Navigation Buttons: Similar to buttons you might see on a common video player you have the "**top**" button which will take you to the first record of the type you have set in the selection filter, "**Prev**" which will show the record prior to your current record, "**Next**" to view the following record, and "**End**" button to see the last record of the selection filter group.

Use the "**Browse**" button to see a columnar list of the records that matches' the current "**Selection Filter**" type . Once you have clicked the "**Browse**" button you will see a list of records matching the current type. At the bottom of the screen you will see a row of buttons each is explained below.

"**Help**" – to view the help topic associated with the page of CLMS you are currently in.

"**Excel**" – Can be used to export the currently displayed records into a Excel Spreadsheet (Excel Must be installed on your computer)

"**Open**" – by selecting one of the records displayed using your mouse you may then click the "**Open**" button whereby the "**Members Edit**" screen will appear showing the currently selected record.

"**Add**" - will simply provide a message indicating that new records must be added using the main "**Members Edit**" screen.

"**Edit**" - will allow you to make edits to the currently selected record.

"**Delete**" – also displays a message stating that deletes can only occur from the "**Members Edit**" screen.

"**Highlight**" – drop down will allow you to highlight certain record types within the list to distinguish between them. For example there is an option for select "**SpouseCard**" which will highlight all records within the list that have a spouse cards.

Making a Candidate a Member

HINTS

Key word:

⌨   Initiate a

Candidate

Initiating a candidate: *Once a candidate is entered, the next step in the process is to make this candidate a member once all the requirements for your lodge have been met.*

Update Mode - C(A)ndidate
Selection Filter CAND ▾   5

Change the selection filter to the "**CAND**" setting or you may press the

Active Elks	256	All Life Elks
Candidates	5	All Records
Delinquents	255	

"**Candidates**" button from the list of blue quick select buttons either of these actions will restrict your selection of records to type indicated by each button. In this case there are 5 Candidate records. You can browse through the records using the browse basic navigation buttons or you may use the "**Browse**" or "**Find**" buttons to locate the specific candidate you are working with.

Select type New Memb ▾
Select type New Memb
New Elk by Initiation
Transfer Dimit into this Lodge
Absolute Dimit from this Lodge
Absolute Dimit from another Lodge
Reinstatement back into this Lodge
By Certificate of Release
By Certificate of Status

Once you have the record you wish displayed on the members edit screen and the selection filter is set to "**CAND**" there will be a drop down to the right of the selection filter with options to choose.

Select Type New Memb: Now you must decide what kind of new member record you wish to add. Most common is to initiate a new candidate to the lodges membership. This is selection is "**New Elk by Initiation**" this is what you would choose for a new member that has not been a member before.

Your other options are listed below.
"**Transfer Dimit into this Lodge**" - a member in good standing has dimited from another lodge and is affiliating into this.
"**Absolute Dimit from this Lodge**" – member took an absolute dimit and is now re-affiliating back into the lodge
"**Absolute Dimit from another Lodge**" - admission of a member who has obtained a Absolute Dimit from another lodge requiring dues and fees.
"**Reinstatement back into this Lodge**" – Reinstatement of an unaffiliated Elk back into his/her former Lodge dues required.
"**By Certificate of Release**" – certificate of release issued by the Lodge Dues and Fees will be required.
"**By Certificate of Status**" - issued by the Grand Lodge for a member of a defunct lodge either by "**By Certificate of Release**" or "**Transfer Dimit**

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H I N T S

Key word:

💻 Assign Officers
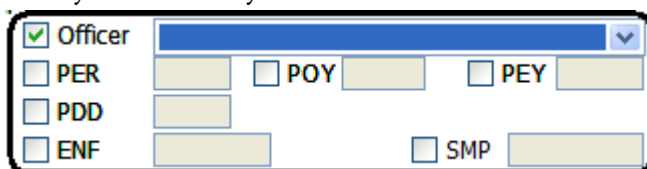
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Assignment of Officers and Committeemen

</td><td>

Chapter

9

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Making and removing Officer/Committee assignments : *Now that you have added some members to your lodge database you can assign them to officer positions and committee assignments. Using the members edit screen you can make these assignments for each member required and CLMS allows you the ability to remove these assignments at the start of the new fiscal year for all assignments.*
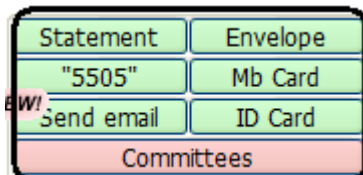
Officer assignments: On the **"Members Edit"** screen for each and every member you have the ability to make any member an officer. In the lower right hand section of the members edit screen are a series of check boxes **"Officer"** (when checked will allow for selection of officer title from drop down on the right), **"PER"** (for Past Exalted Ruler), **"PDD"** (for Past District Deputy), **"ENF"** (if ENF donor). When the **"Officer"** check box is checked you can select from the drop down any officer titles for the current elk year thus making this member an officer.
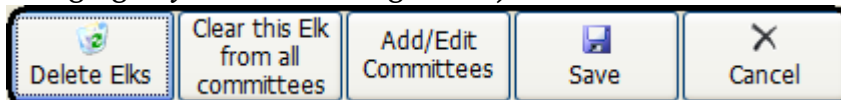
Committee assignment: On the **"Members Edit"** screen you will note the **"Committees"** button located on the right hand portion of the screen below the **"Email"** and **"ID Card"** buttons.

Once you have clicked the **"Committees"** button you will be presented with two columns **"Statutory"** and **"Non-Statutory"** committees. Below these identifiers you will see a series of numbered drop downs with committee names to the left and the committee position on the right. You can select from any of these drop downs and choose the position this person has within any particular committee. Your choices are **"Member", "Coordinator", "Past Member"** or **"Interested".**

Committee assignment removal: *(You may wish to perform a local backup before deleting or changing any committee assignments).*

At the bottom of the **"Committee Assignment Screen"** is a row of buttons to perform useful committee assignment functions. You will be prompted to affirm any changes you make using these buttons since these changes cannot be undone easily once they are accepted.

"Delete Elks" – this button will show you a list of all committees where you have an opportunity to remove every member from all committees by pressing the **"Clear All Elks from All Committees"** button or while holding down the **"Ctrl"** key use your mouse to select each

committee you wish to clear. As you select each committee name it will highlight in yellow. Once you have the several committees you wish to remove all members from, highlighted you can click the **"Clear All Elks from highlighted Committees"** button. Only those committees highlighted should be effected by this action unlike the **"Clear All Elks from All Committees"** button which removes all committeemen assignment from all committees. *You will be prompted to affirm any changes you make using these buttons since these changes cannot be undone easily once they are accepted.*

"Clear this Elk from all committees" - Allows you to remove the current member from all committees he/she has been assigned to.

"Add/Edit Committees" - Allows you the ability to add to the list of **"Non-Statutory"** committees or change the name assigned to each "Non-Statutory" committee.

"Save" – to save any committee assignments made for the current member.

Officer assignment removal: To change the officer assignments for the current member simply select another officer assignment from the drop down list of titles. By un-checking the **"Officer"** check box you remove this member from any officer position. To remove all officer assignments from your database you must select the **"Lodge Settings"** button on the left hand toolbar while the **"Members Edit"** screen is displayed.

Once in the **"Lodge Settings"** screen select the dark blue **"Other Settings"** tab there you will see the **"Deselect ALL Officers"** and **"Deselect ALL Committees"** *(you will be prompted if you would like to mark those served as Past Members of the committees they are in)* these two buttons provide you with an easy way to remove all officers and committeemen at the start of each new fiscal year. Once you select either of these buttons make sure that you read the messages that appear since these changes will be permanent.

Changing A Members Status

H I N T S

Key word:

🖥 Deceased

🖥 Widow(er) Records

🖥 Drop A Member

Change in a members Status: *Rarely do things remain the same. As time goes by, a members status can change due to a wide variety of circumstances. A member may become inactive either voluntary or involuntary, they may leave your lodge for another or even become active with your lodge after some time away.*

Delinquencies: When changes for a member or record within CLMS occur, dates are very important in recording these events and can have a direct affect on your membership numbers. Members may become delinquent when they fail to pay the required dues and these members will be automatically put into a delinquency category according to the amount of time that dues are lapsed. **Note**: on the selection filter there are categories of delinquency that you can choose from. There are **"All"** (showing all delinquent members), **"6Del"** (6 months), **"12Del"** (12 months) and **"18Del"** (18 month) categories. This does not mean that they are inactive, rather it simply allows you a way to determine the dues status for your members.

Deceased: A member may be marked as deceased there are two date fields in CLMS to record such occurrences. You may not find out about the passing of a member for sometime after it has actually happened therefore there is a **"Reported Decd"** date in the format of "mm/dd/yyyy" to record the date that you discovered this status. This field will not have an effect on your membership numbers, it is simply used for informational purposes. The field can be found below the tabs for address information. To record the actual date of death, you are provided with **"Actual Decd"** date field also in "mm/dd/yyyy" format. This field which resides directly below the **"Birth Date"** field does have an effect on your ending membership. It also marks the member as deceased.

Upon providing an <u>**"Actual Decd"**</u> date and the member has a spouse you will be given the chance to create a **"Widow(er)"** record. You can reply "Yes" or "No" to automatically have a new **"Widow(er)"** record created for the spouse. You will then see a message box indicating what the new record number for the **"Widow(er)"** is in the form of a prefix "W" and 5 digit number "W12345". Only upon entering the **"Actual Decd"** date will you be prompted to create a **"Widow(er)"** record.

Inactive: A member may be marked as inactive by taking one of the following.

- **"Dropped"** – Entering a drop date for the current fiscal year
- **"Absolute"** – By providing an Absolute date this member will be marked as inactive
- **"Transfer Out"** – Supplying a transfer out date usually accompanied by supplying a Lodge name and number in the **"To Join"** box directly below.
- **"Expelled"** – entering a date in this field and will cause the member to be inactive.

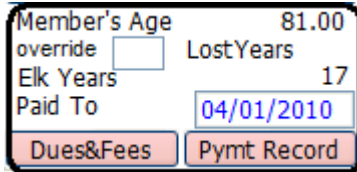# Dues Payments – Assisted Dues

HINTS

Key word:

- 💻 Dues and Fees
- 💻 Dues Paid by New Brothers
- 💻 Dues Payment

Member's Age	81.00
override	LostYears
Elk Years	17
Paid To	04/01/2010
Dues&Fees	Pymt Record

Paying Dues and Fees: *CLMS has a centralized place to post dues and fees for your membership.*

Located on the middle right hand side of **"Members Edit"** screen is a red button associated with a member/candidate's **"Dues&Fees".** This button is used to post any payments for dues and fees associated with the current record showing on the **"Members Edit"** screen

Upon clicking this button you will be presented with a series of buttons for various types of payments that can be posted for a record in CLMS.

Buttons for Posting Dues and Fees: Below is a list of buttons for posting the various dues and fees along with a short description of each. Keep in mind that these fees are managed in the **"Lodge Settings"** screen, see **Chapter3 Lodge Settings and Setting up Lodge Dues.** Note that the dates these transactions are to take affect must be manually entered on the **"Members Edit"** in the dates provided.

(Keep in mind that many of these fees can get posted at the time of converting a candidate record into a member these buttons allow you to post after the fact)
"Transfer Dimit" – by clicking this button you can post the dues associated with a **"Transfer Dimit"** of a member. There is a **"Pay"** button at the bottom, of this screen to post this payment and a **"Show account details"** button to view all payment information for this record. This amount is set on the **"Other Fees"** tab in the **"Lodge Settings"** screen.

"Abs Dimit this Lodge" – this fee is associated with a member that is dropped for non-payment, maintained on the **"Other Fees"** tab of the **"Lodge Settings"** screen.

"Abs Dimit other Lodge" – by clicking this button you can post the dues associated with a member that has received an absolute dimit from another lodge, maintained on the **"Other Fees"** tab of the **"Lodge Settings"** screen.

"Certificate of Release" – the fee posted for an un-affiliated Elk on Certificate of Release, maintained on the **"Other Fees"** tab of the **"Lodge Settings"** screen.

"Certificate of Status" – Performs no posting informs you to post via **"Transfer Dimit"** or **"Certificate of Release"**

"Initiation Fees" – Initiation fees that are paid by a candidate, maintained on the **"Initiation Fees"** tab of the **"Lodge Settings"** screen.

"Regular Dues Payments" – Use this button to apply regular dues for this member. On the **"Dues Payment"** screen that appears you will see break downs for One Year Regular, Life *(Only if member is designated as a Life Member)* and Six Months Regular. The exception is if the member is checked on the **"Members Edit"** screen as **"Assisted"**, then no dollar amounts will appear for this member. ☑ Assisted

"Dropped for non-pay this Lodge" – fees posted to be paid by this member for being dropped from lodge membership.

Printing Cards

H I N T S

Key word:

- 🖥 Print Cards Buttons/Menu
- 🖥 Print ID Cards
- 🖥 Print Member and Spouse Cards
- 🖥 Print Member Cards

Printing Member and Identification Cards: *CLMS offers several locations where you can print member and ID cards. You can do it for the current record or groups of records.*

Print Cards for Current Member/Asscociate Member: On the **"Members Edit"** screen as you are working on a member record there are two buttons in a group of **green** buttons that are
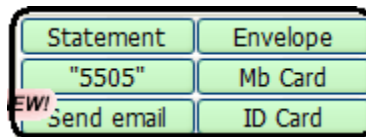
located on the screen note two particular buttons one for member cards **"Mb Card"** or id cards **"ID Card"** *(ID Card must be checked)*
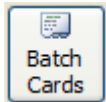
Once you have selected one of these cards to print you will be taken to the standard card interface where you will need to choose the appropriate card stock. Your options are the following

- 5822 – Membs, Assoc & Can with Spouse 2/page
- 5828 – Reg Memb, Assoc & Cand 8/page
- 5834 – Life Elks 8/page

You must select the **"Paid To Date"** from the drop down and you can even select the starting card that you wish to print on, this feature helps you to save on card stock waste.

Print Cards for Groups of : On the **"Members Edit"** screen on the tool bar that runs along the top is a button for **"Batch Cards"** select this button to enter the card menu that will take you to a form that presents several buttons for different card printing options.

Printing Options

- **"Assoc Member cards with and without Spouse ID cards" –** where you can print Associate membership cards 2/page stock or 8/page and Associate member spouse cards only available in 2/page stock. Select **"Paid To Date"** from the available dates in the dropdown. You can provide a range of card numbers to print or just use what is automatically supplied after you select your stock, this will select all associate members in the system.
- **"Print Cards as Dues are Paid" –** Use this option to print Members or Candidates with a spouse that has the **"ID Card"** option checked for the spouse. You must provide the appropriate posting date range any dues within this range will be included in your card output. As with all cards you can select the starting card by clicking one of the card stock positions shown on the right hand side.
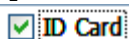
  ☑ ID Card Allows for spouse cards.

- **"Member cards with and without Spouse ID cards" –**This selection allows you to print any of the following, you must provide the correct **"Paid To Date"** from the drop down and can select the starting card for printing by selecting one of the rectangle cards displayed.
  - o Regular Member, Candidate with spouse 2/page
  - o Life members with spouse 2/page
  - o Regular Member & Cand 8/page (does not include spouses)
  - o Life Memb 8/page only life members.

- **"Member cards with and without Spouse ID cards" –** to print Identification cards only here you can print to both 8/page and 2/page stock and supply the **"Paid To Date"**, you can provide the card number range to print or *use the default which will select all*.
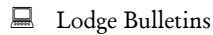
Sending Bulletins via Email or Mail
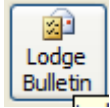
H I N T S

Key word:

🖥️ Lodge Bulletins

Methods of Sending Bulletins: *CLMS allows for several methods of sending information to your members. You can send traditional postal or as is becoming more common by email.*

To start the lodge bulletin process click the **"Lodge Bulletin"** button on the top tool bar of the **"Members Edit"** screen.

You will be taken to the **"CLMS – Lodge Bulletin Labels – CLMS"** window. On this window there are several options for sorting, label type *(if printing labels)*, group choices and email options *(if sending via email).*

Label Type Options

You can have 4 types of labels or an envelope output available from which to select for your lodge bulletin. For labels **(Dot Matrix – 1 Across, Inkjet/Laser – 2 Across, Injet/Laser - 3 Across and Envelope)**

Label Format Options

Yon choose from several options for what information you want to print on your Lodge Bulletin Labels. ****must be configured** *see Chapter 3 Lodge Settings and Setting up Lodge Dues*, **Other Settings Tab about Check boxes for Title options**

- **Postal Bar Code** (displays postal bar code across top of label)
- **Postal Bar Code and Member Number** (prints postal bar code above name and prints member number after name and titles ****must be configured**)
- **Carrier Route** (prints carrier route code above the name no bar codes printed)
- **Carrier Route and Member Number** (prints carrier route code above the name, no bar codes printed and prints member number at the end of name and titles ****must be configured**)
- **Name and Address Only** (prints only standard name with titles ****must be configured** and address format, no barcodes or member number)

Label/Email Output Options

Sorting Options – You can choose what field you would like to sort on and whether the sort should be ascending or descending.

Include "Undeliverable" – will include all records of the selected group even if marked as undeliverable.

News letter overrides Label/Email

There are two checkboxes that can be set to override how it has been designated on the **"Members Edit"** screen for each members **"Send Newsletter via"** option of their mail address tabs.

This address always u **NEW!** CLMS mailings S000010 Carrier Route C004
☐ Send No Mail Send Newsletter via P ☑️ Clear
☐ Undeliverable ☐ Send No TEM
NEW!

"Include Send Newsletter = E mail" and "Include Send Newsletter = P ostal". For example, you may wish to send your new letter via email and want to include all records even if the desired newsletter delivery method is set to "P". Checking the option to "Include Send Newsletter = P ostal" send emails even to records marked as "P".

<u>Uncheck groups to be excluded, below</u>
Provides you with a way to check off groups you wish to exclude from your labels or email list, this will override what you have selected in the "Other Settings" tab of the "Lodge Settings" page.

<u>How To Send your News Letter</u>
CLMS provides you with three ways to process your news letter addresses.
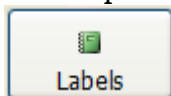
Labels – for printing labels, or envelopes for your News letter

Export – you can select an output type to export to. Common output types are "CSV" (comma separated values), XLS (Excel) and many other formats. You will see a list of options after you have made a final selection of records you wish to export.

Bulk Email – Bulk email allows you to send via emails and allows for attachments to your email so that you can send your entire News Letter via email. *(Email settings must be set see Chapter 5 Setting Up Email)*

Common to all three methods – regardless which method you choose "Labels", "Export" or "Bulk Email", you will be presented with a screen "Potential records for labels, export or email". Here you will view all records that are part of this selection with check boxes to the left of each. You can choose to uncheck some of these records to exclude some. There is an "Unselect All", you may want to unselect all and then just recheck particular ones.

There is also an option to remove specific zip code ranges. Once you have made your selection choices then you can click the "Remove" button to remove and view your final selection. Click the "Next" button to move on to the final printing, emailing or exporting phase.

Note: *If your selection method is Bulk Email you will only see records that have email addresses entered on the "Ph/email" tab for each record, this can be found on the "Members Edit" screen's address area.*

Bulk Email – When sending via email you will be taken to a screen that looks like most typical email user screens. You will see a message below the "To..." box showing how many records will be included in this mailing. The "From..." should show you the email that is configured for sending the emails in the "Lodge Settings" page Chapter 5, as well as the "Bcc..." you have configured.

"Attach..." – Use the attach button to attach your News Letter or any other correspondence to this mailing.
"Send" – finally use the send button to start the emailing process.

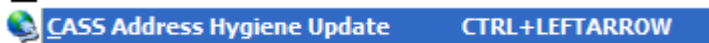# CASS submissions

---

H I N T S

Key word:

🖳 CASS

CASS Hygiene Update: *CLMS allows for the CASS a trademark USPS service. Below is outlined the steps for submitting a CASS update.* ***It is highly recommended that you perform a backup prior to submitting a CASS update.***

CASS Steps:

1. Perform a backup see **Chapter 4 "Backup and Restore of CLMS"**
2. From the **"File"** menu on the **"Members Edit"** screen select the **"CASS Address Hygiene Update"** 🌐 <u>CASS Address Hygiene Update</u>   **CTRL+LEFTARROW**

3. You will be presented with a **"CASS Address Hygiene Update"** screen which will contain your configured email if incorrect simply type the email you wish to use.

4. Click the **"Upload"** button this will start the upload process to the elks.org website. You will be prompted with a warning message that you should perform a backup click **"Yes"** if you have already performed a backup. **"No"** if you have not, and proceed to backup your database.

5. After you have clicked the **"Upload"** button and the upload has been completed a message will appear **"CASS Address Hygiene Upload Complete",** you may click the **"OK"** button which will exit you from the **CLMS system.**

   <u>DO NOT RESTART CLMS UNTIL YOU HAVE RECEIVED AN EMAIL INDICATING IT IS OK TO DO SO.</u>

   You will receive two emails from CLMS@elks.org. 1ˢᵗ email will have a subject **"CASS starting for CASS3000.zip"** "3000" will be replaced with your lodge number. 2ⁿᵈ Email will have a subject **"Output ready CASS3000.zip"** do not launch CLMS until you have received this **2ⁿᵈ Email.**

6. Launch CLMS, you will see a message on your screen **"Searching for CASS address Hygiene files to download"** with a progress bar going left to right.
7. A message will then appear **"CASS update retrieved"** along with download details you may click the **"OK"** button to proceed
8. You will get one more message **"CASS Restore Completed".** You may click the **"OK"** button now **CLMS will now restart automatically.**
9. Once CLMS opens you will see a series of pdf Reports for the following purposes.
   a. **cass.pdf – Summary Report PS FORM 3553 to be submitted with your mailing to the USPS with your mailing.**

b. **ndi.pdf – National Deliverability Index Customer to be submitted with your mailing to the USPS.**
c. **err.pdf – Error Report used for correcting errors internal reference – please review these errors and make corrections.**

Annual Report

H I N T S

Key word:

🖥 Annual Report

🖥 EOY Procedures

Annual Reporting Process: *CLMS allows you to verify your membership numbers so that you can successfully submit your Annual Report. There is extensive information in CLMS Help see key word "Annual Report" and a useful check list is provided when processing your annual report see key word "EOY Procedures".*

Annual Reporting Steps

Below is an outline of the steps for processing your lodges Annual Report.
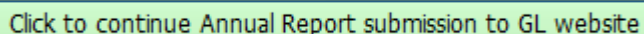
Step 1 Annual Report Page 1 Review.

1. Click the **"Reports"** button on the tool bar above the **"Members Edit"** screen..

   [Reports icon]

2. Change the **"Report Category"** option to **"Grand Lodge"**
3. Select **"Grand Lodge Annual Membership Report"** from the list of reports, then click the **"Report"** button below. This will provide you with a printable version your annual report with your numbers so that you may review. Actual submission of the report is done online.

Step 2 Annual Report Page 1 Submit.

1. Review all information on this report once you are sure that your numbers look correct. You may then click the green button **"Click to continue Anuual Report submission to GL website"**

   Click to continue Annual Report submission to GL website

2. After clicking the **green button** above you're browser will automatically launch to the elks.org website. You must supply **your secretary user and password** for the elks.org web site to login and proceed *(you are no longer in CLMS but the elks.org website).*
3. You will be presented with an online version of your **Annual Report** with numbers provided by CLMS.
4. Scroll down on this screen and Enter values for 28 through 37, using only numbers *(no decimals or commas)*

5. If you scroll to the bottom of this page, there is a box for certification enclosed in rectangle you must review this certification. It should show the correct secretary name check the box to accept and click the **"Submit to Grand Lodge Now"** button.

6. Any errors encountered via the web submission process should be printed and fixed on your report.

Step 3 Grand Lodge Annual Charitable Report.

1. With the **"Report Category"** set to **"Grand Lodge"** select the **"Grand Lodge Annual Charitable Report"**
2. You may use this process to update your Charitable Report numbers through out the year to do this click the green **"Click to continue Charitable Report submission to GL website"**
3. Once again you will be prompted for your **secretary user and password** to login to the elks.org website *(you are no longer in CLMS but the elks.org website)*. You will enter an interface where there are buttons at the bottom of the page, one **"Add New Program"** to add new programs throughout the year and **"Submit Charitable Report to Grand Lodge",** once your ready to submit.
4. When adding programs and data to the charitable numbers at the bottom of the page make sure you click the **"Save"** button whenever you enter or change any data.
5. Once you have completed entering programs and data for these programs and are ready to complete the annual submission you can submit by clicking the **"Submit Charitable Report to Grand Lodge"**

November 1ˢᵗ (Semi Annual) Report

H I N T S

Key word:

⌨ Semi Annual
   Report

⌨ November 1ˢᵗ
   Report

Semi Annual November 1ˢᵗ Report: *CLMS provides you with a way to review and submit your Semi Annual Report. Keep in mind that like the Annual Report this function is now performed online on the elks.org website*

Semi Annual Report Steps

Step 1 Semi Annual Report Review printed report

1. Click the **"Reports"** button on the tool bar above the **"Members Edit"** screen.

   [Reports]

2. Change the **"Report Category"** option to **"Grand Lodge"**
3. Select **"Grand Lodge November Membership Report"** from the list of reports, then click the **"Report"** button located at the bottom of this screen. You can then print a copy of your Semi Annual Report for review purposes. Actual report submission is done online. Check your numbers on this report if ok proceed to **Step 2 Semi Annual Report Submission.**

Step 2 Semi Annual Report Submission

1. Review all information on the printed version of this report. Once you are sure that your numbers look correct you can click the green. **"Click to continue November Report submission to GL website"**

   Click to continue November Report submission to GL website

2. After clicking the **green button** above you're browser will automatically launch to the elks.org website. You must supply **your secretary user and password** for the elks.org web site to login and proceed *(you are no longer in CLMS but the elks.org website).*
3. You will be presented with an online version of your **Semi Annual November** report with numbers provided by CLMS.
4. Review and verify that your numbers look as they should, you can only make your submission once.

5. If you scroll to the bottom of this page, there is a box for certification enclosed in rectangle you must review this certification. The correct secretary name should be displayed check the box to certify this submission. Provide your lodges Federal Employer Identification Number this information can be obtained from your treasurer. Click the **"Submit to Grand Lodge Now"** button.

Check the certification box below, and click the "Submit to Grand Lodge" button to save your work and submit your report to Grand Lodge. You will NOT be able to submit further revisions online.

Please do not submit this report prior to your last meeting in October.

☑ Per Section 12.050(i) of the Grand Lodge Statutes, I certify that I am *Richard Flores*, and that I am the current lodge secretary of lodge 1316, and that the figures above correctly report the membership of Lodge 1316 for the period ending 11/01/2008. I further attest that I have the approval of the Exalted Ruler to submit this report.

Lodge Federal Employer Identification (FEIN) Number: 34-343431334
If you don't know your lodge FEIN number (Federal Employer ID), please consult your lodge Treasurer, or any correspondence you may have had with the Internal Revenue Service.

Submit to Grand Lodge Now

Click to submit

HINTS
Key word:
🖳 Uninstalling CLMS
🖳 Re-install

When instructed to do so un-install/re-install: *In the event that CLMS becomes inoperable, you may be instructed by either your coordinator or the CLMS Helpdesk to remove the current version of CLMS and install a fresh copy of the application.*

Chapter

17

IMPORTANT BACKUPS! *It is very important that you backup your CLMS application on a regular basis. It may be too late to backup if CLMS becomes un-responsive and you are unable to perform one. See Chapter 4 Backup and Restore of CLMS.*

Steps for un-installing CLMS: *Follow these steps to successfully un-install CLMS.*

1. Click on the windows **"Start" button**

2. Select the **"Settings"** then **"Control Panel"**
3. Select the **"Add or Remove Programs"** from the control panel.

4. Once you have the **"Chicago Lodge Membership System – CLMS1"** application highlighted by selecting it, click the **"Remove"** button that should be directly below this item. You may be presented with several updates as shown below. Remove the updates first then the main application.

5. You will be prompted to confirm that you are attempting to remove the selected application and all of it's features? Click the **"Yes"** button.
6. Once the uninstall is complete click the **"Finish"** button to complete the un-installation

Steps to Delete Folders: *You are required to delete the folders that get created by CLMS, to remove any residual files that may cause problems.*

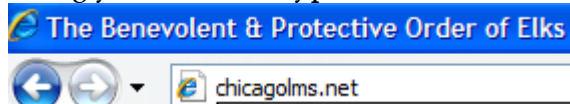1. Right click on the windows **"Start"** button and select the **"Explore"** option.

2. Locate **"C:\Program Files\ChicagoLMS"** and delete this folder either by right clicking on the folder and selecting the **"Delete"** option or hitting the **"Delete"** key on the keyboard.

Steps to Re-install CLMS:

1. Using your browser type in the address bar **"chicagolms.net"**

2. This will take you to the elks.org website. You must supply **your secretary user and password** for the elks.org web site to login.
3. Once you have successfully logged into the elks.org website click the **"Downloads"** shown along the row of tabs.

4. Scroll to the bottom of the page that is presented and click the link **"Download ChicagoLMS Installation File"**

Available for download!

   - Download ChicagoLMS Installation File

5. You will be prompted to either **"Run", "Save"** or **"Cancel"** select the **"Save"** button.
6. When the **"Save As"** window appears select the **"Desktop"** button that appears on the left hand side of this window, then click the **"Save"** button.in the lower right hand side of the "Save As" screen.
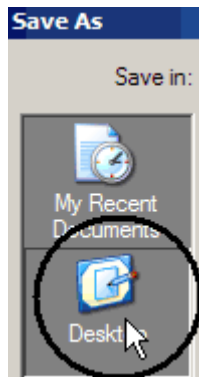
7. . Once the download has completed you will then have the options of **"Run", "Open Folder" or "Close".** Select the **"Run"** button.
8. You may get a security warning from your Anti Virus or Firewall, indicating that **"Publisher could not be verified. Are you sure you want to run this software?",** click the **"Run"** button to allow.
9. Click the Next button when you come to the option to accept the lincense agreement then check the **"I accept the terms of the license agreement"** option then click the **"Next"** button.

10. Supply your desired user name and company name usually the name of the Secretary and the name of the lodge click the **"Next"** button.
11. Click the **"Install"** button.
12. Click the **"Finish"** button.
13. Perform the restore from back up, see *Chapter 4 Backup and Restore of CLMS*.