

## CLMS QUICK TIPS

### ADDING A NEW MEMBER

Click on the “Add” button on the top-left of the screen.



Click “OK” on the next two pop-up message boxes.



When entering a new member, you will ALWAYS start with a member number with an “A” as the first character and add 5 digits. This can be 12345, 00001, or ANY number.

*This is NOT related to the member number that will be issued when they are “finalized” as a member of your Lodge.*

Enter the name, spouse, address, phone, email information on the left side of the screen.

**TIP >** It is easy to use the “tab” key to move from field to field.

Enter the information on the right side of the page. This includes Lodge (*your Lodge, or where they were Initiated if this is a Transfer*), Birthplace, Birth Date, Proposed Date, etc.

After **Proposed Date**, you are taken to a pop up box that will ask for the **initiation fee** data.

Make sure that the payment information is correct at the top for a full initiation fee payment or a partial payment.

Click the “**Make Payment**” button at the bottom-left of the screen.

When finished, click the “**Close**” button on the bottom right of the screen.

A dialog box titled "Initiation Fee Payment". It has two radio buttons: "All" (selected) and "Partial". Below that, it shows "CLARK, MIKE", "A12345", and "Over 26". There is a text input field containing "25.00". At the bottom, there is a table with columns "Number", "Last", "Dues", and "Type".

Number	Last	Dues	Type
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At this point, SAVE the record. You now have a “**Candidate**”.

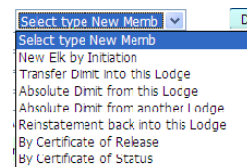
This may be a Transfer from another Lodge or a Certificate of Release or a new member, but they are all “in the mill” to become a member of your Lodge.

You now have a new drop-down list at the top-left of the membership record that says “**Select Type New Member**”.

To complete the process of bringing in a new member, click on this drop-down box and select the method that is being used to bring in a new member.

If it is a new member by Initiation, select “**New Elk by Initiation**”.

The pop-up box that appears will allow you to enter their Initiation Date, any remaining Initiation Fees, Partial Dues payment and the new member number.



**TIP >** Be sure to make note of the next member number to be issued.

*If your next membership number is not 6-digits, add leading zeros to make it 6-digits.*

**TIP >** If this is a Transfer Dimit, Absolute Dimit or Reinstatement, **BE SURE** that you enter an Initiation Date.

## CLMS QUICK TIPS

### ADDING A NEW NON-MEMBER

#### Notes on Member Number

If your Lodge is presently using four- or five-digits and is not even close to using six, then enter a sequential member number and add leading zeros to make it a six digit number.

For nonmembers enter as follows:

Code	Type	Example
No Leading Code	Member	XXXXXX <i>6-digits</i>
W	Widow	WXXXXX
L	Lodge	LXXXXX
A	Applicant / Candidate	AXXXXX
S	Associate / Stray <i>(future Stray Only!)</i>	SXXXXX
T	Associate Member <i>(future Only!)</i>	TXXXXX
V	Advertiser	VXXXXX
P	Dignitary	DXXXXX
E	Auxiliary	EXXXXX
M	Parents: nonmember Mother / Father / Grandparents <i>future only!</i>	MXXXXX
D	Descendents: nonmember Daughter / Son <i>future only!</i>	DXXXXX
I	Siblings: nonmember Sister / Brother <i>future only!</i>	IXXXXX

**TIP >** It is more meaningful to give a logical number sequence or meaning to the XXXX. For example number your **applicants** A0001, A0002, etc. For the **Lodges**, use the Lodge number, e.g., L0335, L1309, L0622, etc. For the **widows/widowers** it could be meaningful to use the deceased spouse's number - W4223, W0976, W0033, etc.

## CLMS QUICK TIPS

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### SHORTCUT KEYS, ETC.

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- F3** – Next (scrolls forward to the next record).
- F4** – Previous (scrolls back to the previous record).
- F5** – Top (goes to the beginning of the database).
- F6** – Bottom (goes to the end of the database).
- F7** – Search (brings up the Search window).
- F8** – Order (brings up the Order Index window).
- F11** – Back Up (makes a back up of your data to a disk).
- F12** – Dues Payment (brings up the Dues Payment Window).

# CLMS QUICK TIPS

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## USING CLMS HELP

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The Help features of Chicago Lodge Membership System are provided to assist you when you need help with a particular portion of the system. There are 3 types of help provided in Chicago Lodge Membership System: Embedded Help, HTML Help, Context-Sensitive Help. Let's take a look at how each is accessed and used.

### Embedded Help

To access Chicago Lodge Membership System's Embedded Help, left-click on the **"Help"** menu and then select the **"View/Hide CLMS"** option as shown in the screen below.

When the embedded help system is activated an additional yellow screen will be visible at the bottom of the Chicago Lodge Membership System. This screen will provide you with detailed information about the fields and features available on the Membership and Lodge Settings screens.

To see the information you need only hover your mouse over the field or control on the screen that you want information about. See the screen shot below for an example of how this works.

To close or remove the yellow screen simply click the **"View/Hide CLMS"** from the **"Help"** menu once more.

### HTML Help

Another type of help that the system provides is HTML Help. To access the system's HTML Help (this is the help you are currently using), left-click the **"Help"** menu and select the **"Help"** item as shown below.

This will bring up the Help Topics Screen.

The Help Topics screen is divided into four sections that are represented by the Contents, Index, Search and Favorites tabs. Click on any of the tabs to view that section.

#### Contents

This section has a list of books in it and topics are arranged in hierarchical order based on the subject matter. Select a book by double-clicking on it and a list of subtopics (pages and/or books) will be displayed. Select a subtopic by left-clicking on it and the information on that page will display over on the right.

This screen has an area for you to type in the topic you want to find. Click in the field provided and begin typing the word(s) you wish to find information on. When the topic you wish to view is presented, double-click on it and it will be displayed in the right-hand pane of the Help window.

#### Search

Index provides a good way to find information pertaining to a particular topic; however sometimes a more advanced search is called for. Using the Help system's Search feature you can have Help search the entire Help content available for a particular word or phrase and retrieve the help topics that they occur in. When the topic you wish to view is presented, double-click on it and it will be displayed in the right-hand pane of the Help window.

#### Favorites

This screen allows you to save topics that you find particularly useful or you frequently access for quick and easy retrieval. To add a help topic to your Favorites list simply locate and select the topic using Contents, Index or Search; then click on the Favorites tab. You will see that the title of the topic you are viewing in the right-hand pane has been filled in as the Current Topic at the bottom of the Favorites pane. Click the Add button just to the right of it and the topic you have selected will be added to your Favorites list until such time as you remove it.

### Context-Sensitive Help

Within the CLMS program you will notice some screens that have a Help button on them.

Clicking on that button or pressing F1 (function key) on your keyboard will bring up the HTML Help for that particular screen. This can be useful when you want further information or clarification for the screen you are on.