Version

5.0

AssistantSecretary.com

Masonic Software Assistant Secretary

Assistant Secretary Manual

Assistant Secretary 5.0.0

Date of manual: June 9, 2013

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TABLE OF CONTENTS

C H A P T E R   1

WELCOME

Welcome to the Assistant Secretary Help Manual

Thank you for choosing the Assistant Secretary Lodge Database program.

Assistant Secretary is perfect for…
- Lodge Secretary
- DDGM or others who oversee multiple lodges
- Lodge Treasure
- Lodge librarian
- Lodge inventory officer
- Lodge events coordinator
- **Anyone looking for a powerful database solution!**

System Requirements

To run Assistant Secretary, your system must meet these specifications:
- Windows 2000 or XP (Home or Professional), Vista, 7 and 8
- Install latest Microsoft updates (http://windowsupdate.microsoft.com)
- At least an 800 x 600 screen resolution
- 350 MHz processor
- 64 MB RAM (128 MB recommended)
- 800 MB of hard drive space for program installation (note: once you start adding records to the database, this number will increase.)

Installing Assistant Secretary

Follow the instructions on the *Install Wizard* screens. Usually, accepting all default settings will work best.

Installing Assistant Secretary from CD-ROM

1. Start Windows.
2. Insert the Assistant Secretary CD-ROM into the CD-ROM drive. Assistant Secretary Startup menu will activate. If the program does not start, click on the CD-ROM and click on "autorun.exe."
3. Next, follow the instructions on the screen.
4. Once the install program has run, restart Windows before using the Assistant Secretary.

When you first open the application "admin" is both your user name and password.

Installing an Evaluation Copy of Assistant Secretary from the AssistantSecretary.com Web Site
You can download an evaluation copy of Assistant Secretary. Go to
http://www.AssistantSecretary.com/download and follow the directions for downloading a copy of the software.

When you first open the application "admin" is both your user name and password.

Upgrade from version 4 to version 5

Upgrading Steps

1. Install version 5 to your computer
2. Create a folder on your computer (Desktop, etc)
3. In version 5, create a backup of the database and save the backup to the folder you created in step 2 above.
4. In version 4, create a backup of the database and save the backup in the folder you created in step 2 above.
5. Open the "Data Migrator Ver 4.0 to Ver 5.0".
6. On "Old Database" click on Browser and find the version 4 database you saved in the folder.
7. On "New Database" click on Browse and find the version 5.0 database you saved in the folder.
8. Click on "Transfer Data". Once completed, click on "close".
9. Open version 5 and perform a database restore. Restore the Ver 5 database into your database.
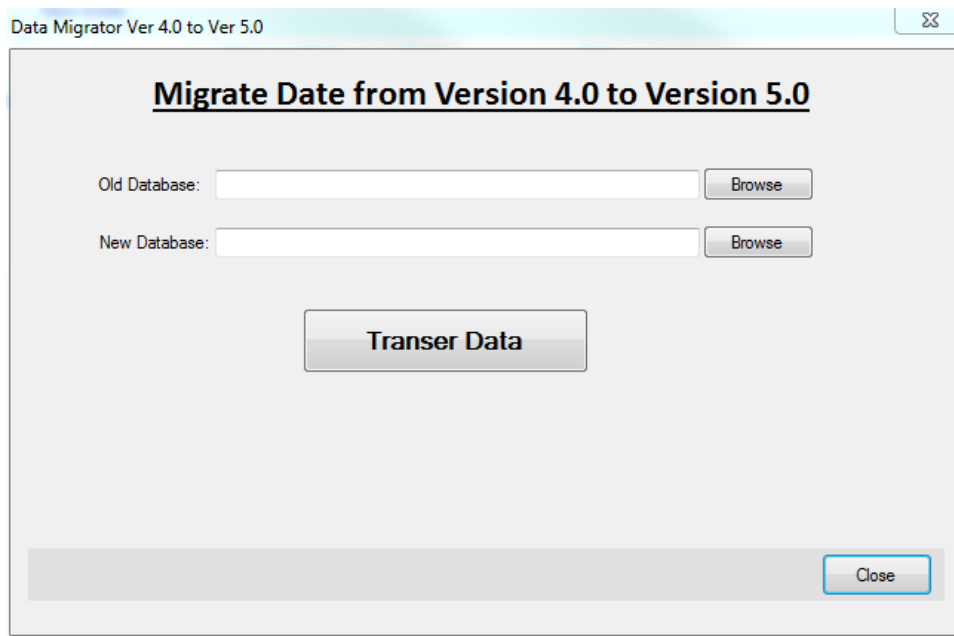
We strongly recommend going to http://windowsupdate.microsoft.com to update your computer with the latest fixes, and patches. **We test the program using the latest updates from Microsoft.**

Installing additional Resources

The Data Migrator Ver 4.0 to Ver 5.0 can be found here: http://www.AssistantSecretary.com/download , along with many other database resources.

Input fields

In order to help you familiarize yourself with the Assistant Secretary, below are some screenshots of our input fields with explanations.

Drop down menu

The drop down menu normally has a down arrow, which shows a listing of information you can pick once clicked.
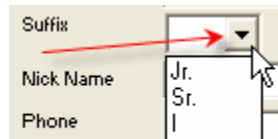
Data base fields

In our date fields, you can enter the date without a drop down menu or you can use the drop down menu. If you do not use the drop down menu, the date must be entered as "month/date/year." If you use the drop down menu, you can use many functions to add the date. The first arrow (top to your left) you can scroll months. The arrow pointing to the left of "March" click here and you can change the month, using a drop down menu. The arrow to the right of 2005, click here and change the year. The arrow pointing to the left is how you activate the drop down menu.
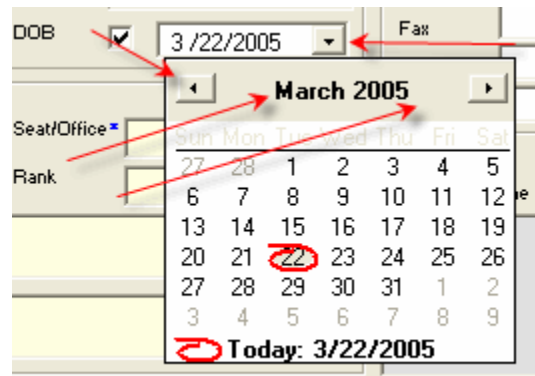
Show a new Window or Information

Click on a circle or box to show a new window. In this case, clicking on visitor will show a visitor window, which is separate from member window. Below clicking on the box will activate the date, as shown above.
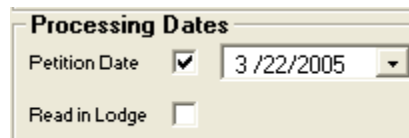
Data input vs. Read Only fields

In the program, there are two kinds of fields: one you can enter data and another, which is "read only."
As shown below, the highlighted fields are read only while the clear (or white) fields you can input data.
Below, years of service is read only and adjust years of service is a field you can input data, in this case
numbers.
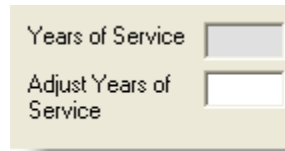
Buttons

All "raised" buttons perform an action. Normally, the actions are save, cancel, update, etc. As you can
see below, some raised buttons have special functions.
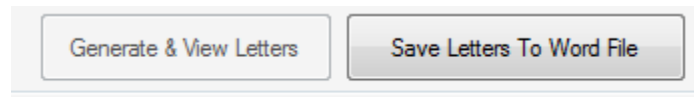
Browse for folder

Clicking on the folder button (the red arrow is pointing) will activate a "Browse for folder" option in
windows, like import/export.
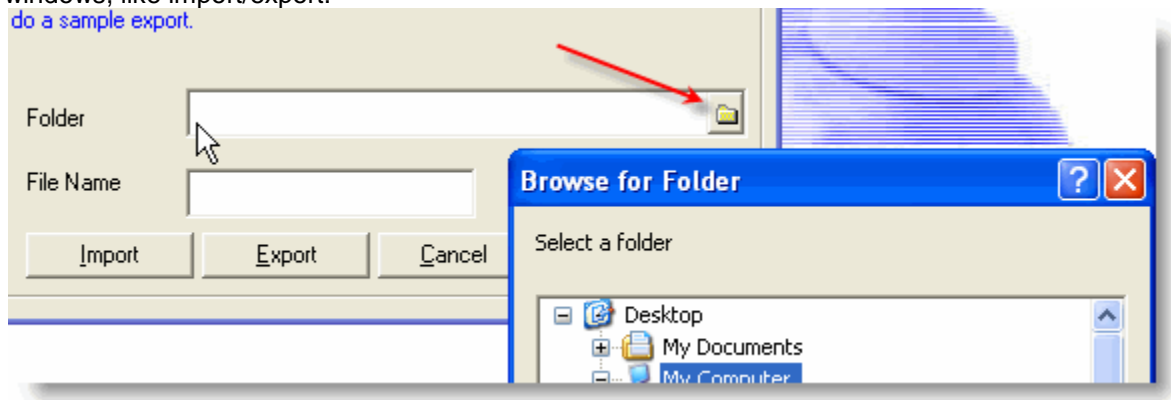
C H A P T E R 2

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 glance over this chapter 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. Membership
2. Choice Register
3. Fixed Dues
4. Grand Lodge
5. Lodge
6. Bank Accounts
7. Close Fiscal Year
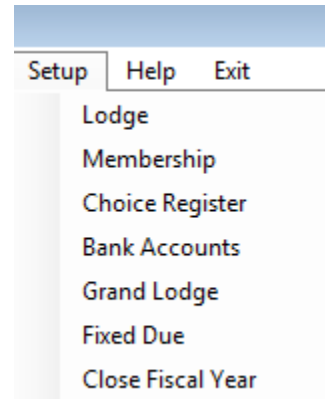
Membership Master

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.
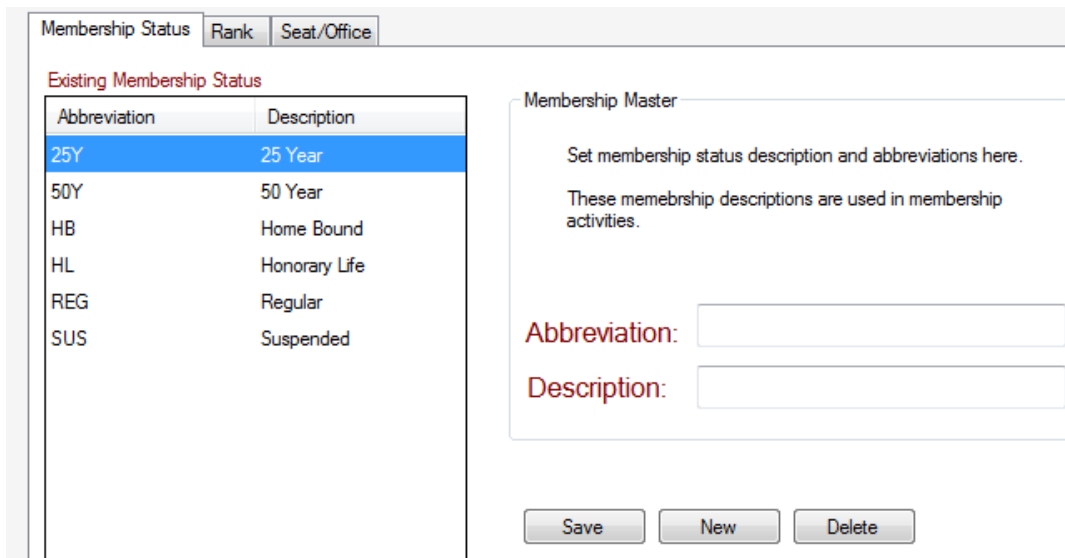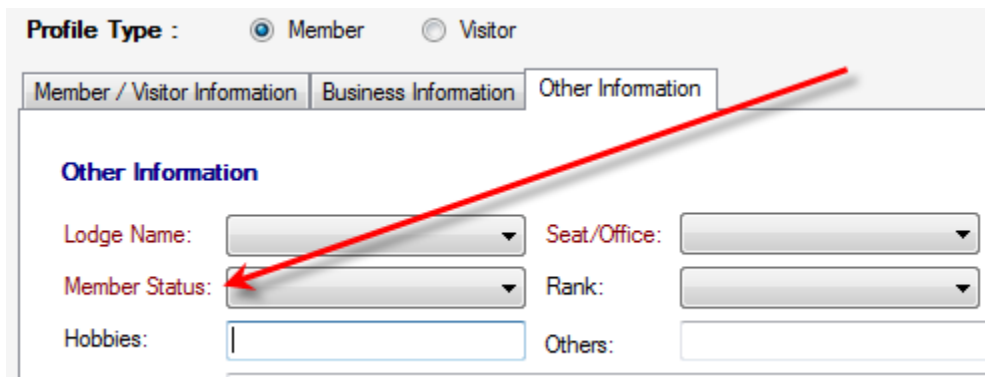
Choice Register/Master

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 the name for "Member Dues" or your dues module will cease to operate.**
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 below). From here dues are automatically entered into the accounting section, member dues.

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 separate by Lodge).

Bank Accounts

Enter your bank account details or place "cash" in all fields. **Either way, you should ensure you are able to recognize the account. The field most used is "Bank Name."** The screenshots below show

how "bank name" appears in different areas of the database (in this case, "Sources of Funds"). 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 (important)**
- Type of account - checking/savings
- Opening date
- Lodge name
- Descriptions

Note: you can keep account details on multiple Lodges or your Lodge can have multiple accounts.

When you setup the banking accounts (top screenshot), the "Bank Name" appears in accounting as "Bank Deposited." The bottom screenshot shows an example of where "Bank Name" might appear.
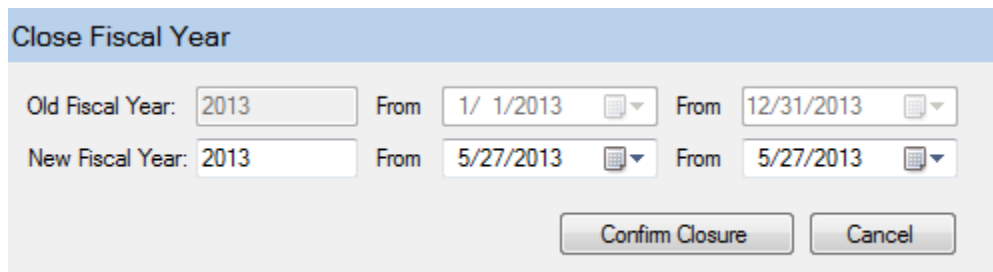
Close Fiscal Year

We highly recommend that you save the database every time you close a fiscal year (FY). When you close a FY, you are performing a couple of actions. The most important has to do with dues. When you close the year, all dues a member has not paid is automatically sent to arrears! Please note, if he overpaid for dues, those funds are sent to arrears as a "-" (negative) number. Closing the FY resets reports as well. You can't undo this! **MAKE A BACKUP BEFORE CLOSING FY!**
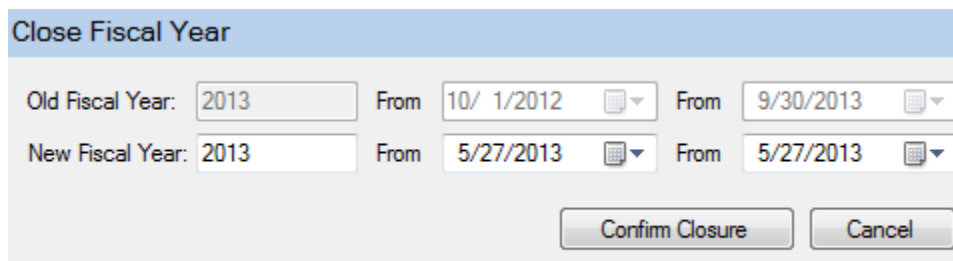
Before you enter any accounting transactions, you will want to start your FY. Many Lodges may run a FY from 1 Oct to 30 Sep.

When the database is new, it looks similar to this screenshot:

After I save the FY from 10/1/2012 to 9/30/2013, the database reports:

As you can see the old FY is now being reported as the dates I inserted. When 2014 arrives, I can put 2014 in "New Fiscal Year" and the dates as 10/1/2013 from 9/30/2014 and press "Confirm Closure".

Ensure ALL of your accounting transactions are entered before closing the FY!

Also, please ensure your database is blank (contains no members) when initially setting up the database. All members in the database will have their "unpaid dues" go to arrears when you close the FY.

C H A P T E R   3

CONTACTS

Members/Visitors

Member's Info: Member

Note: Since most fields are self-explanatory – For example, first name, and phone number fields – we will not cover all fields. **Before you enter members, we recommend you start in Chapter 2 since proper setup of the database is crucial.**

Click on contacts, members, members/visitors. Place your cursor in the first block to your left marked "Member ID". If your first member is John Doe **we recommend you make the Member ID: Doe.John or Doe.J.** Why? The reports will organize your members in alphabetical order. If first name is first, you will have a mess and your reports will be unorganized. Last name format will produce very organized reports.
 Next is Name. **We suggest uppercase first letter and lower case for the rest of the letters (for example, John instead of JOHN). You should do this for all fields** (address 1 and 2, city, etc).

Member ID – We recommend a member ID such as Doe.John. Do not place a comma in the Member ID! Can be any number or letters. For example 1234 or 12 or Mathews or Mathews, JT or Mathews John or Mathews JT. The member ID is the most important item to set up. Not only will you have to find members with member ID but also the program will refer to members by the member ID.

Nick Name – A member's known name, not their birth name.

Email – If you want to use the email feature in the letters feature, you must have an email address here. When sending emails, the program will skip a member without an email address. You do not want to put a fake email in the email block.

State – Should be in the format of CA, SC, GA, etc. The post office recognizes two letter abbreviations.

DOB – Date of Birth in the following format (5/15/1980).

Comments: Information pertaining to membership not located elsewhere, but worthy of keeping, should be placed in this box.

Committee Name – If your member belongs to a committee, it will show in this window.

Save – Save information on a new member or update a record already in the database.

Delete - If you delete a member, you cannot retrieve the information!   The deleted information is lost forever or until you retype it into the program.

Cancel – Cancel your current action.

Remember to keep your input consistent to have better-looking reports.

The business section is there by request. While the majority of Lodges do not ask for business information, some do. Using the business section of Members Info is not required.

Member's Info: Visitor

This section is useful when used with the Lodge handouts. You can capture information on a member and invite him back to your lodge or send out a monthly newsletter (via email) about the events in your Lodge for the upcoming month. (Note: in the letters menu you can also send an email to a visiting member by highlighting their name. More information is available in the letters menu.)

Visitor ID – Much like member ID. This is an ID the program uses to recognize the visitor.

Petition Info

Now click on Petition Info. On Petition Info screen click on Member ID and pull up the name you wish to work (i.e. Doe, J). Next click on type of petition. The rest of the screens are self-explanatory. If some of the processing dates are not used in your jurisdiction don't worry, you can leave them blank. **In the comments and hobbies section, do not place a "hard return." Besides letters and numbers, you should only input comma, space, and period. If you place a hard return, your reports and exports will not work correctly.**

Notes:

Must complete Members/Visitors information first.

On the processing date's section, you do not have to fill out all fields.

Once you click on "rejection date" the member **is not** deleted from being shown in the member ID fields of the program. You can only keep this Brother from showing in reports by adding him to the "left lodge" found in Dates and Degrees section. You can perform reports on "left lodge" members, if you wish.

Type of Petition – There are two automatically loaded into the program. You can add or delete these to fit the need of your lodge in the Masters section of the database.

Affiliations

Affiliations/appendant bodies. This screen is self-explanatory. This is a way to keep track of which other "Masonic" houses your members belong, what seats they hold and how long they have been in those houses.

Dates and Degrees

Dates and Degrees: This is the only part of the database that you can hide inactive members or those members who were suspended, passed away, etc. At the top you will notice a check-mark besides that reads "include inactive members." **In the reason left section, do not place a "hard return." Besides letters and numbers, you should only input comma, space, and period. If you place a hard return, your reports and exports will not work correctly.**

Next is a box used by a number of jurisdictions, Masonic ID. The Grand Lodge normally issues a Masonic ID. The next set of data is joining. This has all the pertinent data when a member joined the lodge. This also includes a date of service.

The date of service is a box used to determine how many years a member has been a Mason. In most jurisdictions, the date of service and raising date will be one in the same. You will also notice an adjusted years of service below years of service. If you place a number in adjusted years of service, the program will automatically reduce the years of service.

Dates and degrees is a very important window in the Assistant Secretary.

Include In-active members - When this is checked all "left Lodge" members will show along with current lodge members. This is useful in case you want to temporarily hide a member (i.e. non-payment of dues, but pays later – you can still report this member, if needed). In other words, you can technically "delete" a member without actually deleting his information so you can use if he returns.

Masonic ID – This is normally provided by the Grand Lodge. Some Jurisdictions use this number in place of a social security number or other type of official ID.

Initiation – Initiation date of a member

Passing – Passing date of a member

Raising – Raising date of a member

Date of Service – In some Jurisdictions, this is the raising date, others it may be another date.

Adjust Years of Service – If a member leaves the Lodge, you can adjust their time. For example, putting a 1 in this box will reduce date of service by 1 year.

Left Lodge – If you place a date for a member ID, the member ID will become "invisible" to the program, but you can bring them back by viewing the members (see "include In-active members" above, and removing the check mark from "left lodge".)

Committee

In the committee name box type the name of a committee you wish to make and click save. Next, open that committee and add members by clicking on the member's name (a check box will appear). You can test by going to the bottom right hand corner and picking committee and see which names appear. In addition, in the members/visitors screen you can see, at a glance, which committees a member belongs.

Committee Name - Name of the committee

Member – pick multiple members or add or remove members by selecting the committee and adding or removing the check mark by their name. Then press save or update.

Formation Date – Date committee formed.

Termination Date – If known, the date the committee will terminate.

Existing Committees / Members – Find committee information by members name (will provide all the committee's a member belongs) or committee name (will provide a list of all the members of that committee).

Non-members / Vendors

This section is only listed as non-members in the database but it should also be used to keep track of vendors. Have a favorite place to order your regalia or books? Or do you hire a non-member to cut the grass of your Lodge? All numbers and contacts could be kept on this database and not on post-it-notes.

Widows

Keep track Full address, Husband name, and Husband date of death. The remarks section is a place you can put visits (find out the last visit) and other health information, if needed.

C H A P T E R 4

ACCOUNTING

To setup as a lodge financial program, as in any financial program, you will have two forces at work: money in (sources of funds) and money out (uses of funds). Both sources of funds and uses of funds must be setup in the Masters section of the database.

You do not have to setup this information in order to operate the database. You can use this application with the members info section only and not the accounting section. However, if you do not complete this section, you will not be able to use the dues feature.

How dues work: Click on "accounting" , "sources of Funds". Click on members dues. The credit balance is the amount of dues that has been paid by the members. To your far right in the application, click on the member ID of the person you want to pull dues information. **VERY IMPORTANT**: The first time you pull this Brother's name is the only time you will be able to place an arrears amount for his member ID. If you press save and not enter an arrears or do not place the correct amount in arrears your information will not be correct. **Be very careful when placing arrears while in the dues section.**

The first time, enter the arrears, amount of dues for this year and any payments this Brother has made. Press save (if not making a payment, place "0" in the amount field). His info is set … Please ensure you have this information correct before you press save.

Sources of funds

As the name implies, this is the window you insert monies coming into your Lodge. This would include dues, and other payments.

Sources of Funds – This drop down menu provides the source of the funds. You can add sources of funds in the masters section.

Arrears (Dues) – Once this is completed, you can never change. You must be careful when filling in arrears.   What are arrears? Arrears are past dues that a member owes the Lodge. To make life easier some members are not filling in the arrears and adding arrears to current dues. Either way will report the same amount, but in reports and letters, a separate arrears line item will allow you to explain why dues are high or set a cut-off for a report.

Uses of funds

As the name implies, this is the window your Lodge log uses of Lodge funds. This would include rental payments, grass cutting services, etc.

C H A P T E R 5

HISTORY

Dates of Seats

Seat/Office – Pick the Office or Seat the Brother held for the period of time you are to enter below.

From Date – Start date Brother in the Seat/Office

To Date – End date Brother in Seat/Office

Committees and Dates

Committee – Type the committee name. This is not tied to the committee window since you might want to add an old committee. Once you have the information completed, press save to save your information. You can then add another committee.

C H A P T E R 6

COMMUNICATION

Letters

To use the Letters section, you first have to setup your boilers.

To setup a boiler, type in a "Letter Description" and then a "Letter Template". These are names that you will recognize. Next, pick a person or group you would like to generate the letter. Now in the large box, start typing your letter. Alternatively, you can copy and paste a letter from Microsoft Word into the box.

After your text is in the letter, you have to insert the merge fields. The merge fields are fields in the database that hold data. For example, if you want to send a dues letter to a member, you would include some of the following merge fields: <<Member_Visitor.PLName>>, <<PaymentInfo.Arrears>>, and <<PaymentInfo.CurrentDues>>. As you might guess, the first is Brother's last name. "P" stands for personal ("B" stands for business), PaymentInfo.Arrears will calculate any arrears the Brother might have and PaymentInfo.CurrentDues lists the current dues the Brother owes.

If you generate a letter for "all members", then you would generate a letter for all members of the lodge.

To print a letter, you can click on "Generate and View letters" or "Save letters to Word file". We recommend using "Save letters to Word file" since it worked better for us in testing (no format issues). Once you have the file in Microsoft Word, you can save into PDF or other formats. If you click on "Generate and View Letters", you can save as other formats as well.

If you click "save" the letter will now save to "letter description" box so you can use later.

Minutes

When we update the database in July/August 2013, we will remove minutes. Minutes was a carry-over from a previous version of the database. The current letters function will keep the minutes boiler going forward.

Events

Events Name – Name of the event
Lodge Name – Lodge associated with the event
Description – Description of the event
Date of Event – Date of the event.

Events organized by the Lodge is not as powerful as most Palm Pilots, Outlook, etc. However, when teamed with our reports, you can keep track of all vital Masonic Lodge activities in a snap. Using our program ensures your Lodge business does not interfere with your "real job" or your personal information.

C H A P T E R   7

INVENTORY

Inventory Setup

In order to start using the inventory program you must first setup the Registrations and Masters Section of the database. Our current focus will be setting up the Masters Section. Click Masters, then choice master. Next click on "item category". Item category is the place you input overall items. For example, if you had a library and wanted to enter all the books of your library, you would enter: Library Books as the item category. You could also get detailed and place: Library Books – Masonic or Masonic Books – History or any combination you can imagine. You can also enter various items. For example, Library Books, Tables, Chairs, Lodge furniture, Lodge regalia, etc.

After you have setup your database in the Masters section, you can complete the stock register. After completing the stock register, your database is ready for the record input through the issue register. The main section of the issue and stock register are listed below…most fields are self-explanatory.

Stock Register

There are two parts to our inventory program. First is the issue register. This is the place you insert your items into the program.

- Item name – name of item (Lodge Grill , Name of book)
- Lodge name
- Item category – (books, furniture)
- Item code – (code, if any, of item or the serial number of an item)
- Item description
- Item quantity (how many you have)
- Item value (good for insurance purposes)
- Date of purchase (good for insurance purposes)

Issue Register

Issue register is the place you issue your items. Issue register can keep track of a Lodge inventory or keep track of a library and keep track of who checked out books, when the where checked out, when due and when late. So enter all your information about the lodge item or library book you want to track in the issue register. The only time you will fill out the issue register is when a person wants to "borrow" or check out an item. The product also keeps track of the value of your items in the lodge and on the lodge property. In case of fire or theft this information can be very valuable.

- Item name (taken from above)
- Item category (taken from above)
- Item quantity (how many you issued)
- Issued to (bother issued)
- Issue date
- Due date
- Return date

C H A P T E R   8

REPORTS

General Reports

Our general reports are very powerful reports that allow you to report on most items in the database. One of the best features of the reporting section is the ability to export the information of the program to other programs (PDF, Microsoft Word, Excel, ect). In order to export a report you must click on the envelope with the red arrow pointing into the empty envelope.

Below are the main sections of the reports with some details about what each one produce.

Membership

- Members List – you can select : Lodge Name, Seat/Office , member status, birthday list
- Committees – report single committee, all committees or only all active committees.
- Address Book – get an address book on : members, visitors , non-members, or widows.

Financial

- Bank registers – Pick a bank and do a report on deposited or withdrawn money from any period of time.
- Check register – report all checks received or withdrawn from any period of time.
- Income / expense book – do a report on income and expenses from your sources of funds.
- Member dues – report a lodge, member, all members fully paid, or not paid.
- Profit and loss – profit and loss for current year and last year.

Other

- Print labels – print labels for all members, visitors, non-members , or widows.
- Event Calendar – pick a lodge shows a description and date of the event.
- Petitions – shows information on your petitions.
- Affiliates – shows information on affiliates and appendant bodies.
- Dates / degrees – shows initiation, passing , raising, date of service, years of service, left lodge, reason left.
- Inventory report – Lodge name, item category. Reports : quantity, value, purchase date, issued to (if issued) , quantity , issued date, and due date.

The reports for Non Members and Widows will be removed in our update in July/August 2013. The Report Designer is a much better tool for generating those reports.

Print labels

Print labels to place on letters to send mail to members. The print labels allow for a variety of labels to be printed. The most widely used Printing labels follow the Avery 5160 format.   (Note: you can use Avery labels: 5160, 5161, 5162, 5260, 5261, and 5262.)

(Note: We highly suggest you use Avery 5160 labels)

When you open the print labels window (under the reports menu), there are a number of options to choose. You can print "all," members, visitors, etc. On label type, you pick the label type you will print to

your printer (see below for our recommendation). You can also pick a lodge name (if you select member). You can also pick one person to print a label.

If printing a batch, you can use the sort report button to ensure all of your zip codes are entered into the program correctly. While this function will not check the zip code against the address, it will ensure you have enough numbers to send the mail.

Next you print the labels. Place the blank labels in the printer and print.

Normally the labels in Avery 5160 arrive in sets of 3000 per box costing no more than $25.00 per pack.

You can find at:
http://www.Amazon.com - Cheap prices, if you order $25 or more (free shipping, in most cases).

http://www.newegg.com - Reasonable prices. Fast shipping and delivery.

http://www.staples.com - Labels tend to be expensive.

http://www.WalMart.com –Might be able to find cheap labels here, if the local store carry them (we have found some WalMart's do, some do not).

(Using the search feature on these sites, search for "5160")

You can also purchase from other online stores and local stores in your area. **It is best to purchase the "real" Avery labels and not the off-brand labels.** In our experience, the Avery labels stick better and you can print to them better. On the other hand, the off-brands may be a lot cheaper.

Print labels alternative

With the introduction of our import/export feature, you can now export your data and use any program you decide to print your labels. For example, you could use MS Word mail merge feature to print labels (or letters, for that matter).

Report Designer

Report designer is a powerful reporting tool, designed to report all areas of the database. When you first open the report designer, you will see a drop down. You can use this to decide which areas of the database you want to report. If you pick "tcomplete_data" you can report on all fields in the database. A complete list of the database fields and their meanings is shown next.

Let's say you wanted to report all dues information for the lodge.

In this screenshot you see the report designer choices. If you were to take a look at the database fields, you would know all the members dues information starts off as "membersdues_XXX". So you can simply pick that information and it will show all the dues information for the lodge when you click on "Load Data" or "Export".

Clicking on "Export" will allow you to save the data in a format that Microsoft Excel can open. Once in Excel, you can further manipulate the data.

You can also run reports for Widows or non-members. Or if you wanted the telephone numbers for everyone in the lodge, or just visitors, you can easily run those reports as well.

Report designer is easy and quick, and in ways much better than the preformatted reports you include.

Analysis and Export

Select Report Source

tcomplete_data ▼

☐ Include Members Who Left Lodge

☐ issue_quantity
☐ issue_issueddate
☐ issue_duedate
☐ issue_returndate
☐ lodge_lodgename
☐ lodge_lodgenumber
☐ lodge_add1
☐ lodge_add2
☐ lodge_city
☐ lodge_state
☐ lodge_zip
☐ lodge_homephone
☐ lodge_businessphone
☐ lodge_fax
☐ lodge_email
☑ memberdues_member
☑ memberdues_arrears
☑ memberdues_currentdues
☑ memberdues_payments
☑ memberdues_Balance
☑ memberdues_sourcesid
☑ memberdues_dateofpayment
☐ mindescription_id
☐ mindescription_lodgeid
☐ mindescription_agenda
☐ minutes_lodgeid
☐ minutes_lodge
☐ minutes_agenda
☐ minutes_mdate
☐ minutes_mtime

Load Data >>

Export

Database Fields

This is listings of fields in the Assistant Secretary. You can use this list to build letters and reports. We will also upload an Excel version in our Download and Resources page online.

| Field	Window	Explanation
member_id	member / visitors	How you recognize a member in the database
type	none	1 = member 0 = member
pfname	member / visitors	First Name of member
pmname	member / visitors	Middle Name of member
plname	member / visitors	Last Name of member
suffix	member / visitors	after last name - Jr., Sr. I, II, III, IV, V, VI
nickname	member / visitors	Name member goes by
padd1	member / visitors	First address
padd2	member / visitors	Second address - normally apartment number, etc.
pcity	member / visitors	City of member
pstate	member / visitors	State of member - should be two letter abbreviation
pzip	member / visitors	Zip code of member
pphone	member / visitors	Home phone of member
pmobile	member / visitors	Mobile phone or pager number of member
pemail	member / visitors	Home email address of member
plifepartner	member / visitors	Wife or girlfriend of member
dob	member / visitors	Date of Birth - Format: 12/17/1965
birthplace	member / visitors	Birthplace of member
badd1	member / visitors	Business address of member
badd2	member / visitors	Second Business address of member
bcity	member / visitors	Business city of member
bstate	member / visitors	business state of member
bzip	member / visitors	business address zip of member
bphone	member / visitors	business phone of member
bmobile	member / visitors	business mobile of member
bemail	member / visitors	business email of member
boccupation	member / visitors	What your member does for a living
bemployer	member / visitors	Member's employer
bfax	member / visitors	Business Fax
lodgename	member / visitors	Lodge your member belong
seat	member / visitors	Seat member holds in the lodge
memberstatus	member / visitors	Status of member
memcomments	member / visitors	Any comments about the member
hobbies	member / visitors	Member hobbies
active	none	Active members = 1, Inactive member = 0
affiliation_member	Affiliations	Same as member ID in "member / visitors" window
affiliation_afflodge	Affiliations	Affiliation lodge

affiliation_afftype	Affiliations	Affiliation lodge type
affiliation_affposition	Affiliations	affiliation lodge position
affiliation_affdate	Affiliations	affiliation date
affiliation_applodge	Affiliations	Appendant lodge name
affiliation_apptype	Affiliations	appendant lodge type
affiliation_appposition	Affiliations	appendant lodge position
affiliation_appdate	Affiliations	appendant lodge date
bankaccounts_account_number	Bank accounts	Bank Account number
bankaccounts_account_name	Bank accounts	Bank account name
bankaccounts_bankname	Bank accounts	Name of Bank
bankaccounts_typeofaccount	Bank accounts	Bank account type - checking, savings, etc.
bankaccounts_oppenningdate	Bank accounts	Bank account opening date
bankaccounts_lodgename	Bank accounts	Lodge associated with the bank account
bankaccounts_description	Bank accounts	Description of account
events_event_name	Events	Event Name
events_edescription	Events	Event description
events_edate	Events	Event date
events_lodge	Events	Lodge associated with the event
committee_committee	Committee	Name of the Committee
committee_member	Committee	Member of the committee
committee_formation_Date	Committee	Committee formation date
committee_termination_Date	Committee	Committee termination date
committee_notes	Committee	Committee notes
degrees_member	Dates and Degrees	Same as member ID in "member / visitors" window
degrees_initiation	Dates and Degrees	Initiation date
degrees_raising	Dates and Degrees	Raising date
degrees_passing	Dates and Degrees	Passing Date
degrees_dos	Dates and Degrees	Date of Service - Some Jurisdictions this is the raising date
degrees_leftlodge	Dates and Degrees	Date left lodge - Once you have this date, the member is invisible to the program
degrees_reason	Dates and Degrees	Reason member left lodge death, non-payment of dues, etc.
degrees_placeofdeath	Dates and Degrees	Place of death
degrees_masonic_id	Dates and Degrees	Masonic ID - if used, normally provided by your Grand Lodge
degrees_yos	Dates and Degrees	Years of Service - automatically filled out by the program based on "degrees_dos"
degrees_adjust_years	Dates and Degrees	If member left lodge for a while and returned, you can adjust degrees_yos
hstcomdates_committee	History	Committee member belongs
hstcomdates_memberid	History	Same as member ID in "member / visitors" window
hstcomdates_fromdate	History	Date member joined the committee
hstcomdates_todate	History	Date member left the committee
hstcomdates_txtnotes	History	Notes on member
hstdatesofseats_memberid	History	Same as member ID in "member / visitors" window

hstdatesofseats_seatoffice	History	Seat member held
hstdatesofseats_fromdate	History	Date member went to seat
hstdatesofseats_todate	History	Date memer left seat
hstdatesofseats_txtnotes	History	Notes on member
stock_itemname	Inventory	Stock item name
stock_lodgename	Inventory	Stock item lodge name
stock_itemcategory	Inventory	Stock item category
stock_itemcode	Inventory	Stock item code
stock_description	Inventory	Stock item description
stock_quantity	Inventory	Stock item quantity
stock_itemvalue	Inventory	Stock item value
stock_dateofpurchase	Inventory	Stock item date of purchase
issue_issuedto	Inventory	Item issue to
issue_itemname	Inventory	Item name
issue_quantity	Inventory	Item quantity
issue_issueddate	Inventory	Item issue date
issue_duedate	Inventory	Item due date - date item is to be returned
issue_returndate	Inventory	Item return date - date item actually returned
lodge_lodgename	Lodge Info	Lodge name - you can have multiple Lodges
lodge_lodgenumber	Lodge Info	Lodge number
lodge_add1	Lodge Info	Lodge address
lodge_add2	Lodge Info	Lodge second address
lodge_city	Lodge Info	Lodge city
lodge_state	Lodge Info	Lodge state
lodge_zip	Lodge Info	Lodge zip
lodge_homephone	Lodge Info	Lodge home phone
lodge_businessphone	Lodge Info	Lodge business phone - might be a secondary number
lodge_fax	Lodge Info	Lodge fax number
lodge_email	Lodge Info	Lodge email address
minutes_lodgeid	Minutes	Name of Lodge
minutes_lodge	Minutes	Name of Lodge
minutes_agenda	Minutes	Name of minutes agenda
minutes_mdate	Minutes	Date of minutes
minutes_mtime	Minutes	Time of minutes - normally the hour of the meeting
minutes_minutes	Minutes	Name you want to call the minutes
petition_member	Petition Info	Same as member ID in "member / visitors" window
petition_pettype	Petition Info	Petition type
petition_sponsor1	Petition Info	Sponsor
petition_sponsor2	Petition Info	Sponsor
petition_sponsor3	Petition Info	Sponsor
petition_chairman	Petition Info	Chairman
petition_member1	Petition Info	Member on petition committee
petition_member2	Petition Info	Member on petition committee
petition_member3	Petition Info	Member on petition committee

petition_llastlodge	Petition Info	Petitioners last Lodge Location
petition_nlastlodge	Petition Info	Petitioners Last Lodge name
petition_jlastlodge	Petition Info	Petitioners Last Lodge Jurisdiction
petition_petcomments	Petition Info	Comments about the petition
petition_petd	Petition Info	Petition date - Format: 12/17/1965
petition_readd	Petition Info	Petition read in Lodge date - Format: 12/17/1965
petition_rejd	Petition Info	Petition rejection date - Format: 12/17/1965
petition_accd	Petition Info	Petition received date - Format: 12/17/1965
petition_don	Petition Info	Petition date of notification - Format: 12/17/1965
petition_notified	Petition Info	Petitioner notified - Should send registered mail - Format: 12/17/1965
memberdues_member	Accounting	Same as member ID in "member / visitors" window
memberdues_arrears	Accounting	Any arrears the member may have outstanding
memberdues_currentdues	Accounting	Amount of current dues
memberdues_payments	Accounting	Dues paid
memberdues_sourcesid	Accounting	N/A
memberdues_dateofpayment	Accounting	Date of dues payment Format: 12/17/1965

C H A P T E R 9

UTILITIES

Import and Export members
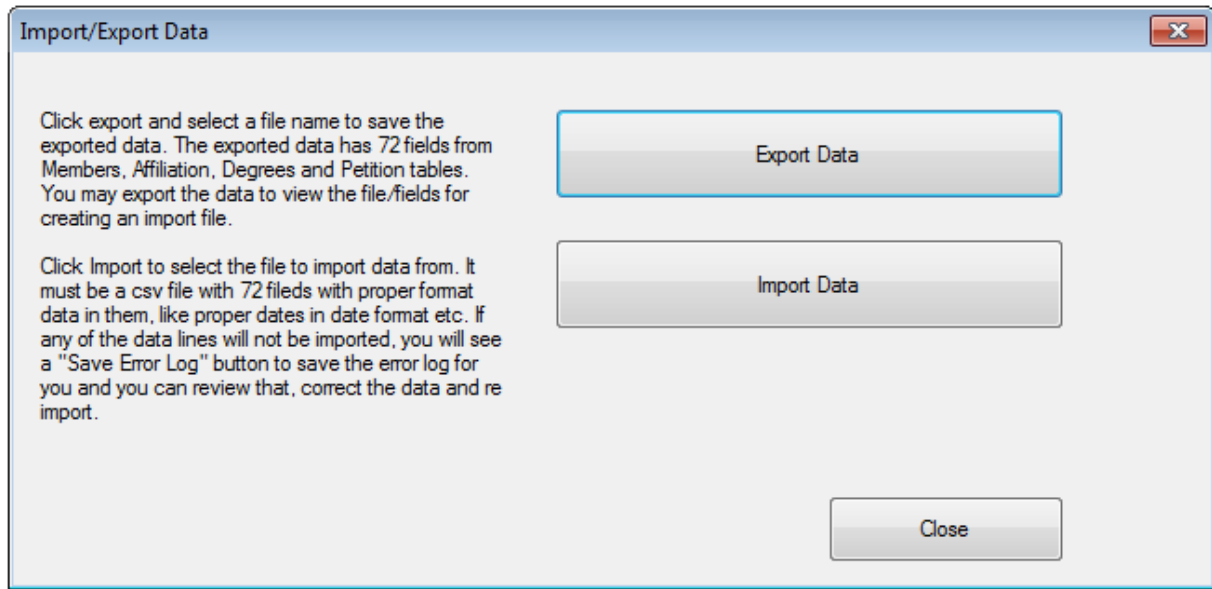
Our import/export feature allows you to import and export most data pertinent to the member.

Import: Why would a member want an import program? It is easier to add members through an import program. For example, you could send them the import information in an MS Excel spreadsheet, have them fill it out and import the information. Without the need to type all information for your members, this is a very valuable feature.

Export: Why would a member want an export for the Assistant Secretary? Due to our implementation of our "build your own reports" there is less of a need for an export in the Assistant Secretary. One could still make the argument that you could use the export feature to build your own reports or build your own mailing labels, etc.

You can import/export information from the following windows: Members/Visitors, Petition Info, Affiliations, and Dates & Degrees.

How to export

Exporting information is relatively easy. 1. Click on import/export (in Utilities window). 2. Click on Export Data. 3. Save the report to my documents or to your desktop. Next go to File Name and type a file name. Some examples of a good file name: export, 17May05, etc. The file will automatically save as a .csv. CSV files can open with any spreadsheet program, like Microsoft Excel. You can also open .csv files in WordPad or NotePad, but the file is comma delimited and might not make much sense.

How to Import

The most important thing to remember when importing is that we use comma delimited to import. If you place a comma anyplace in the import, your import will fail! For example, we recommend using "Doe.John" as the Member ID since "Doe,John" will fail. Once has a comma, and one has a period. If you write in comments or hobbies, please place a ";" instead of a comma.

Importing takes a lot more effort on your part to ensure it is successful. The first thing you have to do is get a name for the fields. That is easily done by doing an export. It is very important to remember how you setup the program. When you import, your fields will be case sensitive. For example, to import someone who is a "Jr.", you must type "Jr." in the suffix box (without the ""). If you type "jr." or "Jr" the import may not work. Same goes for state, rank, etc.

Also, it is important to understand, if you keep all caps or all lower case, that is how your data will look when imported. john doe will import as "john doe." When you do labels for your address, they will read for the name "john doe."

Once you have your data in your file, save the file as a .csv. If you named the file 17may05, once you click on import, the program would rename it 17may05.csv. To import, simply pick the folder 17may05.csv is located. In File Name, you only have to put 17may05 in the field. The program will automatically rename the file 17may05.csv and import. Open members/vistors and all of your members should be there. If you have any problems, take a look at the log file, which is always located in the same folder as the import file. It will be the import name_log.csv. In our case the log file would be named "17mar05_log.csv".

Important considerations

Before you import, you must ensure you have the database setup correctly for the data to import. For example, if a member has a work address of SC, but your Lodge is in NC (near SC border), you have to input the state of SC in the setup. Also, the import must be as it is labeled in Masters (not SC in Masters, but you import as South Carolina).

We recommend upper case, then lower case for all data imported since this will be the format for your reports (i.e. George, not GEORGE). All dates should be typed as month date year (8 Jan 05 would be 1/8/2005). Last, you should not have commas (,) in your import.

When using MS Excel, or any spreadsheet program, you will want to keep your data as .csv. Assistant Secretary will only import .csv.

Backup / Restore

Backup

To backup your database, click on utilities and then backup database. You have two options: Safe Backup or Backup to Location. You should use Safe backup every time you work in the database. You should use Backup to Location should be performed at least twice a month. Safe backup places a backup of the database (your data) to a folder on your computer. If, for whatever reason, you were to accidentally delete your Assistant Secretary folder, you could reinstall and perform a safe restore to retrieve your data. Backup to Location is used when you want to store your information on a CD-Rom or other media capable of storing your data. See our explanation below for reasons you might want to store your information at another location.

You select Safe Backup and the database will make a copy of the database. After your first backup, it will ask if you want to overwrite, your current backup… click yes. That is it.

To backup to a location, select the option Backup to Location. Press OK. Press yes, to make a copy of database. Now a window will appear. Pick a directory you would like to temporarily store your database (desktop is picked by default. Now type a name for your backup. We normally use this format: ASBackup3Mar05. This is easy to understand and provides all information about the backup. Once you save your backup, you are ready to burn the backup to a CD-Rom.

Restore

To restore a database, click utilities, restore database. To do a Safe Restore, click OK. The program will ask if you want to restore over your current database, click yes (if you want to do that).   Next the program will provide a warning, click yes, if you want to restore. That is it.

To restore from location, click on restore from location and then click on OK. The program will ask if you want to restore over your current database, click yes (if you want to do that). Next a box will appear. Click on your database that you made with Backup to Location. If you previously burned the backup to a CD or other media, copy to your desktop first; this will save time in finding your file.

Other important information about backup and restore

The most important thing to remember is that a backup must be done AT LEAST once a month to a secure location other than your computer. A separate backup should be kept away from the building that your current computer is located. Why? In case of fire, theft, etc your backup will be safe. The main reason not to keep your backup on your computer is due to hard drive failure. In a recent study, hard drive failure is the #1 problem that occurs with computers.

Change Username or Password

Change user name or Password: Click on utilities, change password. Next highlight your current username and change to what you would like it to be. Type your old password, then type your new password, and type your new password again.

Note: Once you have changed either your user name or password from "admin," we cannot retrieve your information.

There is NOT a "back door" or "master password" to this program!

C H A P T E R 1 1

ADVANCED FEATURES

Using two (or more) computers

We do not recommend, nor do we support, utilizing the program on two computers since data loss can occur. This section is dedicated to those users who wish to use the program on more than one computer.

First, you will need to ensure you have a registration key for computer 1 and computer 2. The second registration key is free.

After your data is entered in computer 1, use the backup to location (under utilities menu) to backup your database to the desktop or my documents (or another place you can remember later). Next, copy the database to a CD or other device with enough storage to hold the database (the size of the database starts out at about 12 MB, without data entered).

Now take the database to computer 2. Before attempting to install the database in computer 2, you must ensure the password and user ID of computer 1 and computer 2 are the same. You must also ensure you have registered computer 2. Next, copy the database from your CD (or other device) to computer 2 desktop or my documents. Right click on the database file you just moved and find properties. Click on properties and ensure the database is not read only. If read only, take the check mark off the box and click OK.

Open Assistant Secretary and go to utilities. Find restore database and click on restore from location. Find the database and restore. After you are finished, exit Assistant Secretary and open again. You will see all the data from the previous database on this computer, with the exception of any letters or minutes.

Note that any data on computer 2 will be erased… there is no way to get the information back! The other exception to the rule is, if you make a copy of computer 2 before installing the database from computer 1, you can do a restore. As you can see, this could get complicated and lead to a loss of hours of work if you restore or copy over the wrong database. Use caution when utilizing two computers.

We recommend and support one computer for entering data.

Deleting members

There is one area to delete a members and one to make him "invisible."

To delete a member visit:

1. In the members/visitors window – Pick the member and click on delete. If you already have information for that member tied into the program, you will not be able to delete. As a protective measure members cannot be deleted once integrated into the program. A rule of thumb: once you have imported a member (via import feature) they cannot be deleted. If you only fill out members/visitors window and find a mistake and want to delete a member, you can delete. If you fill out more than members/visitors window for the member, then you will have to delete the member in each section of the database. Once you add dues to a member, you will not be able to delete.

2. In dates and degrees, if you click on date left lodge, the member will be hidden from the program, but can be retrieved if the member returns (suspended for non-payment of dues, etc.).

Lodge Handouts

Our lodge handouts, located at http://www.AssistantSecretary.com/download is an excellent way to import data into your database. The handouts include fields so members can fill out the information and provide to you for insertion into the database.

The most used of these forms is the Visitor information sheet. Once a visitor is in the lodge, the Secretary can hand him a sheet to fill out that includes all the members Lodge, address, email, etc. It normally only takes 2-5 minutes to complete the information. Once all the data is gathered the Secretary can type into the Assistant Secretary. Once in the Assistant Secretary, you can send an email (via letters) to let the visitor know lodge meetings or special events).

C H A P T E R   1 0

HELP

Support

1. For updates to this manual visit: http://www.AssistantSecretary.com/download

2. To register your program, please visit: http://www.AssistantSecretary.com/register

3. In order to receive support or additional help using this manual or software, please follow this link: http://www.AssistantSecretary.com/support

How to Purchase and Register

1. Visit our website to purchase the software (registration key):
http://www.AssistantSecretary.com/purchase

or

http://www.MasonicSoftware.com (if you wish to purchase additional software with your order)

2. Request a registration key (you can request keys for two computers):
http://www.assistantsecretary.com/register

3. That is it! We will send your registration key within 8 hours. During those
8 hours, you can still input data without fear of loss.

(Note: If you wish to upload a "blank" database to overwrite the one you tested please visit our download page.)

The registration process is quick and painless. Registration ensures we can keep our prices very low.

Help Videos - How to use

You can download our help videos at http://www.AssistantSecretary.com/download . You can download the files or watch them on the website. The videos are in industry standard .avi and flash format. The avi file can be played in Microsoft Media Player, but you will have clearer results by downloading our free player also listed at the URL immediately above. **You do not have to install our free player… it is a small .exe download file used specifically to play our videos.**

C H A P T E R   1 2

ADDITIONAL MASONIC WEBSITES

You can find additional Masonic information from these websites:

http://www.MasonicWorld.com - Newsletter, graphics, study material, forum, e-mail (yourname@4masonry.com)

http://www.MasonicSoftware.com - Masonic software: e-books, graphics, screensavers, database, Masonic test, etc.

http://www.MasonicBoardGame.com - An educational tool for Brothers everywhere. Features over 1000 Masonic questions in a board game that was developed from the ground up for Freemasons.

Please let Brothers know about the Assistant Secretary Masonic Database!

We NEED your support!!!