LCL.net Resource Manual
for Fraternal Units

Login

User Name
Password
Fraternal Unit
Organization

Login
Quit

Loyal Order of MOOSE
LCL.net Training Edition

Version: TE2.1
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Welcome!

Welcome to LCL.net resource manual. This manual has been designed for Lodge Administrators, Chapter Recorders, Moose Legion Secretaries, or anyone else within the fraternal unit that wishes to learn more about LCL.net data entry.

About this Manual

This manual consists of eight different lessons. The first lesson overviews some basics about the LCL.net tool. Remaining lessons provide more detailed information about the specific LCL.net screens.

- Lesson 1 – Overview & Navigation
- Lesson 2 – FRU Information Tab
- Lesson 3 – Members Tab
- Lesson 4 – Applications Tab
- Lesson 5 – Sponsors Tab
- Lesson 6 – Transmit Functions
- Lesson 7 – Monthly Reports
- Lesson 8 – Membership Reports & Data Backup

LCL.net screen captures have been included throughout this manual to help support the concepts and procedures being described. Please be aware that the screen captures were obtained from a simulated Moose Lodge. With this in mind, example data was entered for this simulated Lodge and will display as such.

If you are reviewing this material from a Moose Chapter or Moose Legion perspective, do not worry about the example data; the ‘processes’ and ‘procedures’ are the same for all units.
Some Definitions

The table below defines some of the terms that will be used throughout this manual – some pertain to Moose Unit business operations, some pertain to general computer operations, and some are specific to the LCL.net features and functionality.

‘Business’ Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
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</thead>
<tbody>
<tr>
<td>Calendar Quarters</td>
<td>1(^{st}) Quarter – January 1 through March 31</td>
</tr>
<tr>
<td></td>
<td>2(^{nd}) Quarter – April 1 through June 30</td>
</tr>
<tr>
<td></td>
<td>3(^{rd}) Quarter – July 1 through September 30</td>
</tr>
<tr>
<td></td>
<td>4(^{th}) Quarter – October 1 through December 31</td>
</tr>
<tr>
<td>Calendar Year</td>
<td>January 1 through December 31</td>
</tr>
<tr>
<td>Fiscal Quarters</td>
<td>1(^{st}) Quarter – May 1 through July 31</td>
</tr>
<tr>
<td></td>
<td>2(^{nd}) Quarter – August 1 through October 31</td>
</tr>
<tr>
<td></td>
<td>3(^{rd}) Quarter – November 1 through January 31</td>
</tr>
<tr>
<td></td>
<td>4(^{th}) Quarter – February 1 through April 30</td>
</tr>
<tr>
<td>Fiscal Year</td>
<td>May 1 through April 30</td>
</tr>
</tbody>
</table>

‘Computer’ Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition / Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check Box</td>
<td>Area that you can click within to select, or check, the preferred option (✓); clicking again will deselect the option (checkmark).</td>
</tr>
<tr>
<td>Command Button</td>
<td></td>
</tr>
<tr>
<td>Examples:</td>
<td>Buttons that will execute a specific system action (e.g., Login, Quit, Save, Remove, Delete, etc) when clicked.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Login</th>
<th>Quit</th>
<th>Save</th>
</tr>
</thead>
</table>
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<table>
<thead>
<tr>
<th>Term</th>
<th>Definition / Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default</td>
<td>Data that automatically appears in an information field. Pending the LCL.net view, the default data, or default data format, may or may not be changed.</td>
</tr>
<tr>
<td>Drop-Down List</td>
<td>Information field with a drop-down arrow that let’s you choose a preferred data option (from a drop-down list). Click the drop-down arrow to see the options list. Click on an option to populate the field.</td>
</tr>
<tr>
<td>Icon(s)</td>
<td>Small graphics that represent a program or function (e.g. a printer icon opens the print dialog box so you can print the view).</td>
</tr>
<tr>
<td>Information Field</td>
<td>Text area next to a data field that let’s you type in your own data and/or select preferred data from a drop-down list. If the field is grayed-out, you cannot type in it. Entries can be only be typed or selected in white fields.</td>
</tr>
<tr>
<td>List Area</td>
<td>List of data that appears on a screen. Click, or double-click, an item from a list to select it.</td>
</tr>
<tr>
<td>Menu Bar</td>
<td>A series of menu options that appears below the Title Bar (e.g., File, GoTo, Help). Click a menu option to see related sub-menus.</td>
</tr>
<tr>
<td>Partial Screen Capture</td>
<td>Part of an LCL.net screen capture that has been included in the training manual to emphasize an example key concept or area. Ripped edges indicate that additional information would appear in the live LCL.net view.</td>
</tr>
<tr>
<td>Prompt</td>
<td>A system generated dialog box that asks you to confirm an action you are about to perform, or provides additional information about the action you are about to perform.</td>
</tr>
<tr>
<td>Radio Button</td>
<td>Area that you can click within to select (✓), or deselect (✗) your preferred option. Click in the button to choose the option; click again to remove the option.</td>
</tr>
<tr>
<td>Tab</td>
<td>A tab on a screen that represents an area of information. Click the tab to display data associated with that tab.</td>
</tr>
</tbody>
</table>
Lesson 1 – Overview & Navigation

About this Lesson

This lesson teaches you how to log into the LCL.net software, navigate within the views, and then properly log out. Information contained in this lesson applies to all Moose Units – Lodges, Chapters, and Moose Legions – unless otherwise stated.

Objectives

After completing this lesson, you will be able to:

- Successfully log into the Lodge, Chapter, Moose Legion, and/or Student LCL.net database.
- Become familiar with basic LCL.net menu options, command buttons, and screen displays.
- Successfully log out of LCL.net.

Topics

The following topics are included in this lesson:

- Logging into LCL.net
- Getting Around in LCL.net
- Logging Out of LCL.net
- Closing LCL.net
Logging into LCL.net

Access the LCL.net membership software by double-clicking the **LCL.net icon** found on your computer's desktop as shown below. (This icon will appear if a 'shortcut' to the program was created). If the icon does not appear, access LCL.net via your Program files (see the shortcut procedure on the next page).

![Image of LCL.net login screen]

- Type your **User Name** and **Password** as shown above.
- Choose the **Fraternal Unit** type that matches your password.

**Note:** If your system is setup to operate with more than one Fraternal Unit (e.g., Lodge, Chapter, or Moose Legion), the Fraternal Unit field will become a drop-down menu, allowing you to choose the Unit type that you wish to access.

- In the Organization field, choose **Student** to access the LCL.net Training Database (for practice), or choose **Moose** to access your Unit’s live LCL.net data.
- Click the Login button

**Note:** LCL.net always opens into the FRU Information tab.
OPTIONAL: Create an LCL.net Shortcut

If you do not have an LCL.net icon on your computer’s desktop, you can quickly create one. Refer to the example graphic below as the steps are identified underneath the graphic.

Note: The graphic below represents the views from a Windows 7 operating system. Please be aware that views are slightly different based upon the operating system that is installed on your machine (e.g., Windows 7, Windows 10, etc).

⇒ From the Start button, select **All Programs**.
⇒ Scroll until you find the **LCL.net** program.
⇒ With LCL.net still highlighted, right-click and choose **Send to**
⇒ With **Send to** still highlighted, slide your mouse to the right and choose **Desktop (create shortcut)**
Getting Around in LCL.net

Parts of the Screens

After you’ve logged into LCL.net, the **FRU Information** tab – one of the four primary LCL.net tabs – is automatically selected and the related FRU Information appears (similar to the example shown below).

**NOTE:** The look of the screen and the colors you see may vary somewhat depending on how your computer display is set up.

- To view data that has been entered for your Unit’s Members, Applications, and/or Sponsors, simply click the tab of choice. The 4 primary tabs will remain intact; the information area (below the tabs) will change to match your tab selection.

- The File Menu, the Go To Menu, and the Record Header (at the top of the screen) stay very much the same, regardless of the LCL.net view that is displayed.
More About the ‘File’ Menu

Found on the menu bar, the File menu option has five selections (as shown and described below).

- **Backup Database** – this option allows you to backup (and date) your current LCL.net information.

  **REMEMBER:** ‘Save’ is not the same thing as ‘Backup’

- **Restore Database** – this option allows you to restore a Backup Database File to your system.

  **IMPORTANT:** DO NOT restore a backup database without first contacting Moose International’s Member Services Department @ 630-906-3658!

- **Reinitialize Database** – Do not use without first contacting Moose International’s Member Services Department @ 630-906-3658.

- **Logoff** – Logs off of LCL.net and opens the Login screen.

- **Exit** – is one of two ways to close the LCL.net program. The other method is to click the X in the upper right-hand corner of the screen.
More About the ‘Go To’ Menu

Found on the menu bar, the LCL.net Go To menu option provides access to additional LCL.net data fields and/or system features. As you can see from the screen capture below, clicking the Go To menu enables you to:

- Search for a Member record;
- Perform application & daily transmits to Moose International;
- Generate Monthly (financial) Reports;
- Download awards, degrees, and other updated member information from Moose International;
- Export your LCL.net data to meet your reporting needs; and
- Generate LCL.net Reports and Labels. Notice the arrow to the right of the ‘Reports and Labels’ option below. This means that there is additional information for you to look at.

► From the Menu Bar, choose Go To.

► Hover your mouse over ‘Reports and Labels’, drag your mouse to the right, and then drag your mouse down through the list to choose your preferred option.
Scrolling

Many of the screens in LCL.net contain more information than can be seen at one time on the screen. Scrolling is the way you move down the screen to see the additional information.

The Scroll Bar is found on the right side of the information area. There are several ways to scroll:

- Use the Line Down arrow at the bottom of the scroll bar by clicking it repeatedly. This works well if you don’t have far to go.

- Click the Scroll Bar Box, hold down the mouse button, and drag it up and down to where you want to be. You can see which record you are on in a small box that appears as you drag the Scroll Bar box up and down.

- Click into the information area of the screen and use the roller on the top of your mouse to move up and down, if available.
**Browse and Edit Mode**

LCL.net records open in the **Browse Mode**, which means you can view the information, but not change it. If all you want to do is "browse" or view the information, you can do so and then simply close this screen by selecting and clicking the Close button.

You can tell you are in **Browse Mode** if: data fields are grayed out or if the Browse Mode message shows at the bottom of the screen.

**Note**: Clicking the Edit button will put you in **Edit Mode**, or change fields from gray to white. Remember – only white fields can be edited.
**Opening / Editing Records**

Depending upon where you are in the LCL.net views, there are a couple of ways to access Member, Applicant, and Sponsor records and then edit them if necessary. You may need to click an Edit button as shown below, or you may need to click on another field.

Let’s look at the first option – the Edit button. The **FRU Information** tab contains individual information boxes that must be opened for editing.

- To open the information contained in an information box (e.g., Mailing Address Information), click the **Edit button** located in the upper right-hand corner of the desired information box. A pop-up window will open allowing you to update and save the selected information.

- **Enter data**, if desired, in the white data fields
- **Clicking Save** will save your changes to LCL.net.

**Note:** Remember – You cannot edit any information in a grayed-out area.

---

![Image of 'Mailing Address' Edit Button and Pop-Up Window with white Edit fields.]

```
FRU Information

Mailing Address

<table>
<thead>
<tr>
<th>Edit</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
<td>Edit</td>
</tr>
</tbody>
</table>

General Information

<table>
<thead>
<tr>
<th>Number</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>9999</td>
<td>JEFFERSON</td>
</tr>
</tbody>
</table>

Mailing Address

<table>
<thead>
<tr>
<th>Address 1</th>
<th>123 FOURTH ST</th>
</tr>
</thead>
<tbody>
<tr>
<td>City</td>
<td>JEFFERSON</td>
</tr>
<tr>
<td>State</td>
<td>Illinois</td>
</tr>
<tr>
<td>Zip</td>
<td>60639</td>
</tr>
<tr>
<td>Country</td>
<td></td>
</tr>
</tbody>
</table>

Save   Reset   Close

Ed Mode | 10/01/2011 | 10:52 AM
```
Opening / Editing Records, cont

Let’s take a look at the other options for viewing, or editing, LCL.net records. Clicking the Members tab, the Applications tab, or the Sponsors tab displays a list of all the people who are within that category. Each member is displayed individually in a horizontal line of information or a record (as shown in the Members view example below).

Even though we can see the members, just choosing the member and trying to change the information will not work. You will need to open the record to make any changes or edit the record.

⇒ Double-click the desired record in the list above, or highlight the line item and click View Member. An Information screen for the selected record will open (see below).

<table>
<thead>
<tr>
<th>Name Information</th>
<th>Status</th>
<th>Status Change</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Membership Status</td>
<td>12/31/2011</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td>Membership Status</td>
<td>Birth</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td>Individual Status</td>
<td>Death</td>
<td></td>
</tr>
<tr>
<td>Middle Name</td>
<td>Member</td>
<td>Enroll</td>
<td></td>
</tr>
<tr>
<td>Suffix</td>
<td></td>
<td>10/01/1981</td>
<td></td>
</tr>
</tbody>
</table>

Note: Though the Members, Applications, and Sponsors screens display different data, access to the records is the same process.
Drop-Down Menus

Whenever you see a field that has a drop-down box, such as the one shown below, there is information for you to consider for that field and you must select the information from a list.

To access and select drop-down options:

- Select the desired information from the list by clicking directly on your selection.

![Application](image)

![Applicant Information](image)

Click the drop-down arrow to select desired option
Calendars

Some drop-down lists open a calendar such as the one shown below. When the calendar opens, you can:

- Select a date for the field by clicking directly on the calendar date;
- OR –
- Click the right or left arrows to move to the correct month and then choose the date;
- OR –
- Enter a date manually by simply typing the desired date in the information field.

**Note:** If you use a date format other than the default date format, LCL.net will change it to the correct format.
Command Buttons

There are seven main command buttons found throughout LCL.net. Five of these command buttons are shown on the LCL.net view below.

- **Print List**: Prints the list that you are viewing
- **Print Screen**: Sends displayed information to your printer
- **Edit**: Allows you to change information on the screen
- **Save**: Adds/Updates your edited information to the record
- **Reset**: Resets information you may have changed back to what it was the last time the record was saved
- **Close**: Closes the record. **NOTE**: If you have made changes and choose Close, the system will ask if you want to save the information
**Row Display Options**

In the Members, Applications and Sponsors screens, you have the option to change the view to a **Spreadsheet Look**. Checking the Spreadsheet Look box does not affect any information on the FRU Information screen.

If checked for Spreadsheet Look, the above screen would look like the one shown below:
Closing LCL.net

There are two ways to close LCL.net (see below).

⇒ OPTION 1: From the **File** menu, choose **Logoff** and then click ‘**Yes**’ when the log off confirmation prompt appears.

⇒ OPTION 2: Exit LCL.net via the ‘**X**’ in the upper right hand corner of the screen and then click ‘**Yes**’ when the log off confirmation prompt appears.
Lesson 1 – Self Check

1. To PRACTICE using LCL.net, without affecting the Unit’s active LCL.net data, be sure to select ____ in the ‘Organization’ field when you log in to LCL.net (see page 8).
   A. Lodge
   B. Chapter
   C. Moose Legion
   D. Student

2. There are 4 primary tabs in LCL.net. They are: FRU Information, Members, Applications, and ____ (see page 10).
   A. Financials
   B. Sponsors
   C. Help

3. A ‘Save’ and a ‘Backup’ perform the same action in LCL.net (see page 11).
   A. True
   B. False

4. Choosing ‘Go To’ from the LCL.net menu bar, enables you to___ (see page 12):
   A. Search for a member in your unit
   B. Transmit data to Moose International
   C. Export LCL.net data into a report format
   D. Run a number of reports about your membership
   E. All of the above

5. You cannot edit LCL.net data if the information field is ‘gray’ (see page 14).
   A. True
   B. False

6. You must open a member’s record to update his/her mailing address (see page 16).
   A. True
   B. False

7. ‘Drop-Down’ arrows and ‘Scroll’ arrows perform the same function (see pages 13 and 17).
   A. True
   B. False

8. When you close LCL.net, the system will ask you to confirm the logoff action (see page 21).
   A. True
   B. False

Proceed to Lesson 2 – FRU Information Tab
Lesson 2 – FRU Information Tab

About this Lesson

Information contained in this lesson applies to all Moose Units – Lodges, Chapters, and Moose Legions – unless otherwise stated.

- Both full, and partial, LCL.net screen captures are included in this lesson to help support the concepts and procedures being described.
- Please be aware that the screen captures were obtained from a simulated Moose Lodge. If you are reviewing this material from a Moose Chapter or Moose Legion perspective, do not worry about the example data; the ‘processes’ and ‘procedures’ are the same for all units.
- In this lesson, all graphics will appear on left-hand pages and all supporting text will appear on right-side pages.

Objectives

After completing this lesson, you will be able to:

- Successfully navigate within the LCL.net FRU Information tab
- View, edit, and/or delete your unit’s FRU Information data

Topics

The following topics are included in this lesson:

- FRU Information Screen
- Screen Navigation Overview
- FRU Information Field Descriptions
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FRU Information Screen

Top Half of Screen Example

After you log into LCL.net, the FRU Information screen will appear. The screen capture below identifies the data that is included in the top half of the FRU Information Screen. The data that appears on the bottom half of the FRU Information screen is shown on the next page.
FRU Information Screen
Bottom Half of Screen Example
Screen Navigation Overview

- Grayed-out data fields cannot be changed.

- White data fields are editable.

- Some information boxes have an Edit button.

- Save to enter changes.

- Close to exit a window without changing it.

- Reset to restore the screen to the previous data.
Screen Navigation Overview

Overview

The FRU Information screen provides a quick snapshot of your unit’s membership statistics. Refer to the graphic at the left to view the information fields identified on the graphic and described below.

Field Descriptions

1. **Menu Bar** – recall from Lesson 1 that the File, Go To, and Help options appear in the Menu Bar. These options appear at the top of all LCL.net screens. Also recall that the MMMS and Restore Student Data options only appear in the LCL.net student version’s Menu Bar.

2. **Record Header** – recall from Lesson 1 that your Unit Number and Unit Name cannot be changed! Notice that there is no Edit button in areas 1 or 2 in the graphic at the left.

3. **Primary Tabs** – recall from Lesson 1 that the FRU Information tab is one of the four primary tabs that you will use to view or edit information about your unit.

   ➔ Click the FRU Information tab once to bring up information about your unit’s: address, Federal ID#, meeting dates, Moose Legion/Chapter affiliation, contact information, current membership statistics, rates, last audit date, etc.

4 – 9. **FRU Information Boxes** – this information can be updated if/when necessary.

   ➔ Notice that the data fields are grayed out in the view at the left. This is because the FRU Information screen initially opens in a Browse-only mode.

   ➔ Notice the Edit button that appears at the far right of each of the information boxes. Click the Edit button to update data in any one of these information boxes. Be aware that not all LCL.net information boxes contain an Edit button. Also be aware that some LCL.net information boxes contain additional buttons such as ‘Add’ or ‘Remove.’
Mailing and Physical Address Views

4. Click Edit to update unit’s Mailing Address

5. Click Edit to update unit’s Physical Address
Mailing and Physical Address Views

Field Descriptions

1. **Mailing Address** – used to enter your unit’s mailing address and/or edit the address if necessary.

   NOTE: The Chapter and/or Moose Legion mailing address should be the address where the Chapter and/or Moose Legion meetings are typically held (e.g., Lodge’s mailing address).

   - Click Edit.
   - After the Edit Mailing Address window appears, type in the ‘white’ information fields to make address changes as necessary.
   - Click Save to enter changes; or
   - Click Close to exit the Edit window without changing data; or
   - Click Reset to restore data to the previous data.

   The Edit Mailing Address window will close and return you to the FRU Information screen.

2. **Physical Address** – used to enter the physical address for the Lodge. If the physical address is the same as the mailing address, just enter the same information into these fields. To edit the Physical Address you must open an Edit window.

   NOTE: The Chapter and/or Moose Legion’s physical address should be the address where the Chapter and/or Moose Legion meetings are typically held (e.g., Lodge’s mailing address).

   - Click Edit.
   - After the Physical Mailing Address window appears, type in the ‘white’ information fields to make changes as necessary.
     Notice that the Address 1 field highlights and is ready for editing.
   - Click Save to enter changes; or
   - Click Close to close the Edit window without changing data; or
   - Click Reset to restore data to the previous data.

   The Edit Physical Address window will close and return you to the FRU Information screen.
General and Phone Information Views

6. **General Information**
   - Click Edit to update unit’s General Information
   - Fields change per Unit Type

   - **Institution Date**: 10/05/1958
   - **Federal ID**: 55-5555555
   - **Meeting Night/Time**: 2nd & 4th Thursdays
   - **Legion**: 1233
   - **Chapter**:
   - **eMail**:
   - **Administrator Type**: Administrator

7. **Phone Information**
   - Click Edit to update unit’s Phone (Contact) Information
   - **Lodge Phone**: (630) 859-2000
   - **Social Quarters Phone**: (630) 859-2000
   - **Fax Number**: 

- Chapters have a Chapter, Lodge, and Fax #
- Moose Legions have a Moose Legion and Fax #
General and Phone Information Views

Field Descriptions

3. General Information – used to enter some of the general information pertaining to your Unit, such as meeting nights and times, your unit’s affiliation with other Moose Units (e.g., Chapter, Moose Legion), etc. To edit the General Information fields you must open an Edit window.

➔ Click Edit.

➔ After the Edit General Information window appears, type in the ‘white’ information fields to make changes as necessary. Notice in the graphic at the top left that the Meeting Night/Time field and three other fields are ready for editing.

➔ Click Save to enter changes; or Click Close to close the Edit window without changing data; or Click Reset to restore data to the previous data.

The Edit General Information window will close and return you to the FRU Information screen.

4. Phone Information – used to enter contact numbers for your Unit (including the Social Quarters Phone Number if your Lodge has a Social Quarters). Note in the graphic at the lower left that Chapters and Moose Legions have different numbers that appear. To edit your unit’s contact information, you must open an Edit window.

➔ Click Edit.

➔ After the Edit Phone Information window appears, type in the ‘white’ information fields to make changes as necessary. Notice that the unit’s primary phone number highlights and is ready for editing.

➔ Click Save to enter changes; or Click Close to close the Edit window without changing data; or Click Reset to restore data to the previous data.

The Edit Phone Information window will close and return you to the FRU Information screen.
Member Spare Date Labels and Officers Views

NOTE: Officer information MUST be entered online via the ‘Moose Admin’ Menu (see access path below). Officer data MUST be entered online to ensure that current data is uploaded to Moose International.

- [www.mooseintl.org](http://www.mooseintl.org)
- Scroll to the “Resources” ribbon at the bottom of the page
- Click Moose Admin
Member Spare Date Labels and Officers Views

Field Descriptions

5. **Member Spare Date Labels** — used to optionally enter and define up to three additional ‘unit-defined dates’ that might help the unit track more specific information about its members such as ‘Preferred Member’ status for example. To edit the Member Spare Date Labels fields you must open an Edit window.

   ➔ Click **Edit**.

   ➔ After the Edit Member Spare Date Labels window appears, make your **changes** in the ‘white’ information fields. Notice in the graphic at the top left that all three Data Label fields are ready for data entry.

   ➔ Click **Save** to enter changes

6. **Officers** — Though the Officers Information box still appears on the Unit’s LCL.net FRU Information tab, it is no longer used! Do not enter data here! Units MUST, however, enter Officer/Chairman information online through Moose Admin(as shown below):

   ➔ [www.mooseintl.org](http://www.mooseintl.org), Moose Admin/ Login:
# Lodge Totals for <month name> Views

<table>
<thead>
<tr>
<th>FRU Information</th>
<th>Members</th>
<th>Applications</th>
<th>Sponsors</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lodge Totals For December</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total on Rolls Last Month</strong></td>
<td>25</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrolled</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reenrolled</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reinstatement</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transfer In</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dues Paid (Expired)</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Additions</strong></td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expired</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deceased</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transfer Out</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resigned</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Deductions</strong></td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Members on Rolls (as of last transmit)</strong></td>
<td>25</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Members in Arrears for Dues (Expired)</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Percentage in Arrears</td>
<td>7.14%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Previous Month Total**

**Additions Area**

**Deductions Area**

**Current Month Total**

# and % of Members in Arrears
Lodge Totals for <month name> Views

Field Descriptions

7. **Lodge Totals for <Month>** – The Lodge [Chapter, or Moose Legion] Totals box displays a snapshot of the Unit’s membership statistics for the current month (compared to the previous month).

Statistics in this area cannot be changed – the numbers are automatically populated based upon the Unit’s LCL.net transmissions to Moose International. Notice that this information box does NOT contain an Edit button.

- Data begins with membership total from the previous month.

- As Applicants are enrolled, re-enrolled, reinstated, or transferred into the Unit during the month, totals will increment in the Additions area accordingly. All of these members, and any previously expired member who has paid applicable dues and fees during the current month, are included in the Total Additions count.

- If a member’s status changes to expired, deceased, transfer out, or resigned during the current month, statistics will increment in the Deductions area.

- The total number (and percentage) of Members in Arrears during the current month is identified at the bottom of this section.
‘Rates’ Views

NOTE: If a rate has been used (and dues have been paid at this rate), the rate cannot be removed!

Add Rate Window – allows you to enter new dues information:

The Date that the new rate will go into effect is automatically populated for 90 days following the entry.

DO NOT enter an End Date.
‘Rates’ Views

Field Descriptions

8. Rates – used to Add, Edit, and Remove member dues amount for the Lodge [Chapter, or Moose Legion]. Only Moose International can adjust Fees and Life Member rates.

To Add Rates:

➤ Click Add (located in the top area of the Rates Box). The Add Rate window contains the information fields (e.g., rate type, start date, end date, total amount, and currency type) that will enable you to add new dues information for your Unit.

➤ The Start Date for the rate change will be auto-populated. It will appear as 90 days from the date of entry for the new rate.

➤ Leave the End Date as (none). The new rate will remain in effect until the rate changes again.

➤ Enter the total amount for the new dues. The system automatically calculates the dollar amount that belongs to Moose International (or the ABCD/Per Capita amount) and the dollar amount that belongs to the Fraternal Unit.

➤ Verify the Total Amount for accuracy.

➤ Canadian Units: select Canadian Dollars in the Currency Type.

➤ Review all entries for accuracy, and then click Save to enter the new dues rate into the system. The new rate change will be communicated to Moose International after you’ve performed your Daily Transmit (covered in Lesson 6 of this manual).
'Last Examination' and 'Control Dates' Views

'Last Examination' is no longer used as MI does not conduct examinations by an auditor.
'Last Examination' and 'Control Date' Views

Field Descriptions (cont)

9. Last Examination – This field is no longer used.

10. Control Dates – displays dates that identify when the Unit last performed certain 'system actions' within LCL.net (see below). This information may prove helpful from a record keeping perspective or if the Unit has a need to troubleshoot a business operations issue.

Control dates cannot be changed! Notice that this LCL.net information box does not contain an Edit button.

→ Last Changed Date = date that the Unit last made a change in LCL.net.

→ Last Backup Date = date that the Unit last backed up its LCL.net database. Note: Recall that a Backup database for the Unit’s LCL.net data can be performed via File / Backup Database (as illustrated in the graphic at the left).

→ Period End Date = end date for the current dues period.
'Categories' and 'Activities' Views

14 Click a ‘Category’ (e.g. CARDS)

And see all related ‘Activities’ (e.g., 500 Rummy, Backgammon, Bingo, Bridge, Cribbage, etc.)

15 Name the Category; Save the Category

Add Category Window

Add Category

Number 9999 Name JEFFERSON

Category

Category COMMUNITY

Save Reset Close
‘Categories’ and ‘Activities’ Views

Field Descriptions (cont)

The ‘Categories’ and ‘Activities’ information boxes (shown at the left) work together in LCL.net. Entries in these information boxes identify activities offered by the Unit, which should be of high interest to the Unit’s current members, potential new members, and surrounding community. These ‘Activities’ are then classified into ‘Categories.’ When a category is selected, all related activities for that category appear in the Activities area.

- New Categories and Activities can be added at any time.
- Category and Activity names can be edited at any time.
- Categories and Activities can be removed at any time. Be aware that, if a Category is removed, all activities assigned to that category will be removed as well. When attempting to remove a Category, this prompt appears:

![Question Window]

Are you sure you want to remove this Category as well as all of the Activities beneath it?

[Yes] [No]

11. Categories – used to group, or categorize, the types of activities offered by the Unit. To Add a new Category for your Unit’s activities/events:

- Click the Add option located in the top area of the Categories box. The Add Category window opens.
- Type the name of the new Category that you want to add.
- Click Save. This will create a new activity category for the Unit. Be aware that related activities will be displayed until you assign them to this new category.

Note: To Edit a Category and keep all previously assigned activities for the Category, click the Edit button. When the Edit Category Window appears, rename the Category as desired and then click Save.
‘Categories’ and ‘Activities’ Views (cont)

Click on a ‘Category’ to see all currently assigned ‘Activities’:

Add Activity Window

Add Activity

Add Activity Window

Name the Activity; Save the Activity
'Categories' and 'Activities' Views (cont)

12. **Activities** - used to identify specific types of activities offered by the Unit. Activities are assigned to 'Categories.' To **Add** a new Activity for your Unit’s activities list:

- Click the **Category** name. The Activity list will appear.
- In the **Activities box**, click **Add**. The Add Activity box will appear; notice that the Category field displays the Category you selected in the previous step (grayed out field). Refer to the graphic at the bottom left.
- Enter the **name** of the new Activity.
- Click **Save**. This will create a new activity category for the Unit.

**Note:** To **Edit** the name of an Activity and keep the association with an already-defined Category, click **Edit** instead of **Add**. When the **Edit Activity Window appears**, rename the Activity as desired and then click **Save**.

**Note:** To **Remove** an Activity, click on the desired Category to see the list of assigned activities. Highlight the Activity you want to remove and then click 'Remove.' The following prompt will appear, asking you to confirm the remove action.
Lesson 2 – Self Check

9. The FRU Information screen is the first screen you see after you log into LCL.net (see page 2-4).
   E. True
   F. False

10. Which of the following information fields can Units edit (see page 2-6).
    D. Unit’s Name
    E. Monthly Membership Totals
    F. Membership Rates
    G. Control Dates

11. The mailing address for a Chapter and/or Moose Legion should be the address where most Chapter and/or Moose Legion meetings are held (see page 2-9).
    C. True
    D. False

12. Where MUST changes to a Unit’s Officers be made (see page 2-13)?
    F. The ‘Officers area’ on LCL.net’s FRU Information tab
    G. Online ‘Admin Menu’

13. Where, on the FRU Information tab, can you find a quick snapshot of your Unit’s current membership totals – compared to the previous month (see page 2-15)?
    C. ‘Lodge Totals for <month.’ area
    D. ‘General Information’ area
    E. ‘Last Examination’ area

14. If a newly approved dues rate is being entered in LCL.net, the ‘start date’ for the new rate is automatically filled with a date ____ days after the date of entry (see page 2-17).
    C. 30
    D. 60
    E. 90

15. Life Membership rates can only be edited by Moose International (see page 2-17).
    C. True
    D. False

16. Which of the following LCL.net entries work in conjunction with each other (see page 2-21)?
    C. ‘Categories’ and ‘Activities’
    D. ‘Last Examination Date’ and ‘Last Backup Date’

17. If you enter a ‘Total Amount’ for a newly-approved dues rate, LCL.net automatically calculates the portion that belongs to the Fraternal Unit and the portion that belongs to Moose International (see page 2-17).
    A. True
    B. False

Proceed to Lesson 3 – Members Tab
LESSON 3 – MEMBERS TAB

About this Lesson

Clicking the Members tab in LCL.net gives you access to the Members screen. This screen allows you to change information pertaining to, or about, the members of your Unit. Member name, address, and contact information are just some of the information contained on this screen.

Objectives

After completing this lesson, you will be able to:

- Access your Unit’s membership information in LCL.net
- View, edit, and/or delete membership information
- Quickly search for member information

Topics

The following topics are included in this lesson:

- Members Screen Overview
- Customizing Screen Views
- More About Member Status
- The Member Information Tab
  - Edit Member Information
  - Payments Information
  - Family Information
  - Activities Information
- Using Member Search
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‘Members’ Screen Overview

The Members tab is one of the four primary tabs used in LCL.net. After you’ve logged into LCL.net, you can click the ‘Members’ tab to view information about your Unit’s membership similar to the one shown below.

To view, or edit, more detailed information about an individual member, do one of the following:

- Type in a Member ID# or Member’s last name in the ‘Find’ field; OR
- Double-click anywhere on a Member row; OR
- Highlight a member from the displayed list, and then click the View Member button; OR
- Use the Go To feature in the menu bar (covered at the end of this lesson)
**Members Screen Overview**

**Purpose**

Click the LCL.net Members tab to view the status of your Unit’s Active and Inactive Members at any point in time. The example Members screen shown at the left identifies key areas of the Members screen.

**Field Descriptions**

4. **Find** – field that can be used to quickly locate one of your members by typing in the Member’s last name or MID #. When you begin typing, the list will automatically locate members based on the characters you have entered.

5. **Active** – status tab that, when clicked, will bring up a list of your Unit’s Active members.

6. **Inactive** – status tab that, when clicked, will bring up a list of your Unit’s Inactive members.

7. **Member List** – displays a list of member names, phone numbers, membership status, and dues expiration dates for your Active and/or Inactive members (depending upon which of the status tabs you chose).

8. **Print List** – button that will let you print a list of all Active and/or Inactive Members (depending upon which of the status tabs you chose).

9. **Total Active Members Display** – calculates the total number of Active and/or Inactive members in your Unit (depending upon the status tab you chose).

10. **View Member** – button that will enable you to view or edit information about one of your specific members. Note: highlight a member name from the Member List and then click the View Member button.

**REMEMBER** – You must be in an Edit mode to make any changes to a Member record.
Customizing Screen Views

Example Active members list in a spreadsheet view and in ascending (A-Z) order by ‘Name’:

NOTE: Click once on a Column Header (e.g., Name) to view list in ascending (or A-Z) order. Click the header again to reverse the display order (Z-A). The order arrow will reverse direction as well.

Example Resized ‘Name’ Column:

NOTE: Click and hold the mouse button and drag the resizing cursor to change the column width.
Customizing Screen Views

**Spreadsheet Look Option**

Recall from Lesson 1 that checking the ‘Spreadsheet Look’ checkbox will format your display data in an un-shaded table format similar to the one shown at the top left. Un-checking the Spreadsheet Look box will display the same data; however, the rows will appear in the default shaded format.

**Sorting Columns**

Member List displays can be sorted in ascending or descending order by simply clicking once on a column header (‘Name’ for example as shown in the graphic at the top left). Clicking the column header again will display the list in the reverse order. A small arrow next to the column header identifies if the list is in ascending (A-Z) order or in descending (Z-A) order.

- Click the **Member ID** column header to view a list of your members by their MID # in sequential order.
- Click the **Status Change Date** column header to see when your members changed membership status beginning with the most current change date.
- Click on **Status** column header to see a member list that’s categorized by status type (e.g., Active, Deceased, Dropped, Expired, etc.).
- Click the **Dues Expiration Date** column header to see oldest to newest date, or newest to oldest date.

**Changing Column Width**

- Place your mouse in the column heading to the right of the ascending/descending arrow. Don’t click the mouse. You will see the cursor change to the sizing function.
- When the sizing cursor is displayed, click and hold the mouse button and drag to change the column width. When you release the mouse button the column width will change to the selected size.
More About Member Status

Clicking the ACTIVE tab will display a list of Active members only (see Status column below):

<table>
<thead>
<tr>
<th>Member ID</th>
<th>Name</th>
<th>Home Address</th>
<th>Home Phone</th>
<th>Status</th>
<th>Date Expiration Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>00237869</td>
<td>Trafton, Jo</td>
<td>121 PLUM, JEFFERSON, IL, 62278</td>
<td></td>
<td>Active</td>
<td>03/04/2016</td>
</tr>
<tr>
<td>00235810</td>
<td>Hawker, Wel</td>
<td>123 MAIN, JEFFERSON, IL, 62278</td>
<td></td>
<td>Active</td>
<td>03/04/2016</td>
</tr>
<tr>
<td>00195952</td>
<td>Hicks, Al</td>
<td>123 MAIN, JEFFERSON, IL, 62278</td>
<td></td>
<td>Active</td>
<td>03/04/2016</td>
</tr>
<tr>
<td>001295661</td>
<td>Kane, Randy</td>
<td>123 SUNSET AVE, JEFFERSON, IL, 62278</td>
<td></td>
<td>Active</td>
<td>03/04/2016</td>
</tr>
<tr>
<td>001768278</td>
<td>Jones, Bill</td>
<td>200 MAIN STREET, JEFFERSON, IL, 62278</td>
<td></td>
<td>Active</td>
<td>03/04/2016</td>
</tr>
<tr>
<td>00205944</td>
<td>Lengerveld, Jim</td>
<td>200 MAIN STREET, JEFFERSON, IL, 62278</td>
<td></td>
<td>Active</td>
<td>03/04/2016</td>
</tr>
</tbody>
</table>

Clicking the INACTIVE tab will display all types of Status of Inactive member status unless you select a specific status type from the drop down box:

<table>
<thead>
<tr>
<th>Status</th>
<th>Date Expiration Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comp Mail</td>
<td>03/04/1994</td>
</tr>
<tr>
<td>Deceased</td>
<td>03/04/1994</td>
</tr>
<tr>
<td>Dropped</td>
<td>03/04/1994</td>
</tr>
<tr>
<td>Duplicate</td>
<td>03/04/1994</td>
</tr>
<tr>
<td>Expired</td>
<td>03/04/1994</td>
</tr>
<tr>
<td>Resigned</td>
<td>03/04/1994</td>
</tr>
<tr>
<td>Terminated</td>
<td>03/04/1994</td>
</tr>
<tr>
<td>Unknown</td>
<td>03/04/1994</td>
</tr>
</tbody>
</table>

NOTE: The graphic above identifies the status of each of the inactive members in an example fraternal unit.
More About Member Status

Clicking the **Active** tab in the Members screen displays only the Active members for your Unit. Clicking the **Inactive** tab in the Members screen:

- Lists all of your Inactive members and their individual status type by default; or
- Lists only a specific Inactive status based upon your selection from the Status drop-down menu (see the graphic at the lower left).

**Inactive ‘Status Drop-Down’ Options**

As noted above, a list of all inactive members in your unit will appear after you click the Inactive tab on the Members screen. **All** is the default option for the status display. If you would like to filter the displayed list to show only a certain type of inactive status, simply choose the status selection from the drop-down box (see the graphic at the lower left).

<table>
<thead>
<tr>
<th>Choose this status option…</th>
<th>To see a list of Inactive members who…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comp Mail</td>
<td>Want to receive your unit’s newsletter only (entered via a Comp Member application).</td>
</tr>
<tr>
<td>Deceased</td>
<td>Have died.</td>
</tr>
<tr>
<td>Dropped</td>
<td>Have expired more than 12 months ago but less than 24 months</td>
</tr>
<tr>
<td>Duplicate</td>
<td>Have more than one record in the system.</td>
</tr>
<tr>
<td>Expelled</td>
<td>Have been expelled from your unit.</td>
</tr>
<tr>
<td>Expired</td>
<td>Have not paid their dues by the expiration date.</td>
</tr>
<tr>
<td>Resigned</td>
<td>Have resigned from your unit.</td>
</tr>
<tr>
<td>Terminated</td>
<td>Have not paid their dues within 24 months of the expiration date.</td>
</tr>
<tr>
<td>Transferred</td>
<td>Have transferred OUT of your unit.</td>
</tr>
<tr>
<td>Unknown</td>
<td>Have an unknown status.</td>
</tr>
</tbody>
</table>
**Member Information Tab**

Access Path to Member Record: Members tab / Active (or Inactive tab) / Member List:

![Image of Member Information Tab]

**Initial Member Record View:**

Four tabs allow you to view/edit more information about a member in your Unit.

- **Print Screen button**
- **Click Edit button to make changes**
- **Close button**
Member Information Tab

To Access a Member’s Record

Additional information for your unit’s active and/or inactive members can be viewed, and in some cases, edited in LCL.net. To bring up a member record:

➤ Click the **Members** tab.

➤ Click the **Active (or Inactive) tab** to bring up a list of all currently active or inactive members in your unit.

➤ **Double-click on a member** from the list displayed on your screen; or, **highlight a member and click ‘View Member.’**

A member record similar to the one shown at the bottom left will appear. The record opens in a view-only mode. Recall that you must be in Edit mode (or click the Edit button) to make changes.

To View Member Record Details

The first screen that you’ll see once you’ve accessed a Member Record looks similar to the one shown at the bottom left.

11. **Member Information** tab: click to view the member’s: name, address, contact information, employment information, membership status, sponsor information, and important dates pertaining to the member (see graphic at the lower left).

12. **Payments** tab: click to view information pertaining to the member’s dues payment and dues expiration date.

13. **Family** tab: click to view information about the member’s spouse and children.

14. **Activities** tab: click to view activities that are of interest to the member and his family members.

If desired, print any of the views by clicking the Print Screen button located at the lower left corner of the screen. Click the Close button at the lower right of the screen to exit the view.
‘Member Information’ Screen

Edit Mode

SAVE after all changes have been made;

OR

CLOSE to exit without saving changes.

Volunteer Checkbox
Edit ‘Member Information’

Refer to the graphic at the top left. The ‘Edit Mode’ status, shown at the bottom of the top screen, indicates that the LCL.net user pulled up a member record and then clicked the Edit button so he/she could update information about this member. Recall that the white information fields can be changed; the grayed-out fields cannot.

To update (edit) information in the Member Information tab:

8a. **Name Information** – type a member’s new name, address, phone/fax/cell numbers, email address, and employment contact information as needed.

> Both a ‘Current’ and ‘Alternate’ Address tab exist in this area to accommodate members having more than one residence (e.g., ‘summer/winter residents’). Click the Current Address box to identify the member’s current address at any given point in time.

> When selected, the Employment Information tab contains a Volunteer checkbox. Check the box if the member has expressed an interest in volunteering his/her time or skills at, or for, the Unit.

8b. **Member Notes** – type any notes/reminders about the member that might be helpful to recall later (special interests, talents, volunteer preferences, etc).

8c. **Status** – update a member’s membership status to: Active, Resigned or Transferred by choosing the applicable option from the drop-down list. Or, record the death of one of your members by choosing ‘Deceased’ from the Individual Status drop-down list.

8d. **Member Information** – Check the ‘No Mail’ box to stop all mail except for member renewal, member card, and/or Moose Charities mailings. Check the ‘Do Not Solicit’ box to stop any solicitation of member information to outside sponsors, but still receive Moose Charities mailings.

**NOTE:** A ‘Lodge Number’ field will appear on a Moose Legion Member Information record to show the Moose Legionnaire’s Lodge affiliation.
NOTE: Member Spare Date Labels (shown below) were created/edited by the Unit via the FRU Information tab. Notice that these labels appear above in the ‘User Defined Info.’ Dates for these labels are recorded in the ‘User Defined Info’ area.

Shows that the member met the life membership qualifications AND that he paid for the membership 10/1/2003.
Edit ‘Member Information’ (cont)

Refer to the Member Information graphic repeated at the top left as the other editable fields are described below:

8e. Sponsor Information – the member’s Sponsor Name, ID#, displays on the member’s record; Sponsor information cannot be changed!

8f. User Defined Info – this area can be used to enter a ‘Miscellaneous Code Number’ and/or a date for an additional label that you may want to associate with a given member (e.g., preferred member, volunteer of the year, etc). Notice in the note and screen capture at the bottom left that the User Defined Info labels were created by the Unit via the FRU Information.

8g. Dates – the dates displayed in this area tell you a little more about key milestones pertaining to the Member (e.g., birth date, enrollment date, dues expiration date, and other Moose-related milestones).

- Chapter Date Fields = Academy of Friendship, Past Regent, College, and Star Recorder
- Moose Legion Date Fields = Fellow, Pilgrim, Medal of Honor, Past President, Ed Conf (or MLEC), and Elite Ring.

**NOTE: Only the member’s date of birth can be changed by the Unit; all other dates are entered and uploaded by Moose International.**

8h. Life Member Info – this area lets you know if the member has purchased a life membership or if the member qualifies for the life membership purchase. This data is populated by Moose International and cannot be changed by the Unit.

- Life Date – shows the date when the Life Member qualified for, or paid for, a life membership.
- Life Type – shows how the member qualified for the Life membership: either completed 50 years service, paid 50 years dues in advance, sponsored 250 members, or earned the Governor’s Award of Excellence. Please note: the GAE is no longer awarded.
‘Payments’ Tab Screen

![Image of the Payments Tab Screen]

Browse Mode Only
'Payments' Information – cannot be changed by the Unit!

To Access a Member’s ‘Payments’ Information

Follow the steps below to access a Payments record for one of your members:

➤ Click the **Members** tab.

➤ Click the **Active (or Inactive) tab** to bring up a list of all currently active or inactive members in your unit.

➤ **Double-click on a member** from the list displayed on your screen. Or, highlight a member and click ‘View Member.’

➤ Click the **Payments** tab. A member payments record similar to the one shown at the left will appear. The record opens in a browse mode. Information displayed in this screen is populated by Moose International and cannot be changed by the Unit.

**NOTE:** If the Unit does not receive deposits from Moose International, this screen will be blank. If dues are at the amount that Moose International receives, the Unit does not receive a deposit.

To View a Member's Payment Information:

Refer to the graphic at the left as member Payments fields are described below.

9a. **Payment Type** – The type of payment made to Moose International, such as Dues or Life Member.

9b. **Fraternal Unit Deposit Amount** – The amount that was deposited to the Fraternal Unit bank account for this member payment.

9c. **Received Date** – The date the payment was received.

9d. **Deposit Date** – The date the payment was deposited

9e. **Dues Expiration Date** – The current expiration date for the member’s dues.

**NOTE:** Payments information is uploaded to your unit during the Daily Transmit process. Note also that Payment information for Life Members will be blank since the life dues have already been paid.
‘Family’ Tab Screen

Member Spouse Window

Spouse Information

Children Information

Browse Mode

Married Checkbox

Edit Mode
'Family' Information

To Access a Member’s ‘Family’ Information

Follow the steps below to view information about a member’s spouse and/or children.

➔ Click the Members tab.
➔ Click the Active (or Inactive) tab to bring up a list of all currently active or inactive members in your unit.
➔ Double-click on a member from the list displayed on your screen. Or, highlight a member and click ‘View Member.’
➔ Click the Family tab. Information about the member’s spouse and children (if applicable) displays in a screen similar to the one shown at the top left. The top half of the screen identifies information about the member’s spouse; the bottom half of the screen identifies information about the member’s children.

To Add/Edit Spouse Information

10a. Spouse – From the Family tab view, click on Edit to add or remove a spouse from the member’s record. A Member Spouse window similar to the one shown at the lower left will appear.

➔ To add a Spouse, click the Married checkbox and then enter the spouse’s name, birthday, and any other information or notes about the spouse as desired. Then, click the Save button.

➔ To remove a Spouse (in cases of divorce, for example), uncheck (click) the Married box to remove the spouse from the member’s record. Then, click the Save button.

NOTE: Children information continued on the next page.
### ‘Family’ Tab Screen (cont)

#### Children List

- **Add Child Window**
  - **Member ID**: 12345678
  - **Member Name**: Ned Avery

#### Add Child Information

- **Gender**: Male
- **First Name**: Clint
- **Last Name**: Avery
- **Birthday**: 12/28/2002
- **Notes**: Clint has special needs (cannot walk or talk) and requires total adult supervision at all times.
'Family' Information (cont)

To Enter Information about a Member’s Children

10b. Children – Refer to the graphic at the top left. From the Family tab view, click on Add to enter information about a Member’s children. NOTE: If information has already been entered about children, that information will appear in the Children List area.

➢ To add information about a Member’s child, click on Add to bring up the Add Child window (similar to the one shown at the lower left). Enter the child’s gender, name, birthday, and/or any notes about the child if desired. Then, click Save.

The child’s information will appear in the Children List (see below). Notice that you are now able to Edit and Remove information about that child.

➢ To edit any information about a member’s child (e.g., name change or notes, for example), click on the child’s name from the children list and then click Edit. Make changes as necessary and click Save.

➢ To remove a child’s information from the member’s record click on the child’s name from the children List and then click Remove. When prompted, click Yes at the following prompt to confirm the remove action (or No to cancel the action).
‘Activities’ Tab Screen

NOTE: Recall that the Categories and Activities shown in the lists above were created via the FRU Information tab as shown below. Click the FRU Information tab to update these lists.
‘Activities’ Information

To Access Member Activity Preferences

The Activities tab only allows you to view and/or update activities of interest for both the member and the member’s family. To access the Activities screen:

➔ Click the Members tab.
➔ Click the Active (or Inactive) tab to bring up a list of all currently active or inactive members in your unit.
➔ Double-click on a member from the list displayed on your screen. Or, highlight a member and click ‘View Member.’
➔ Click the Activities tab. Four information boxes appear similar to the screen capture shown at the top left: Categories, Activities, Family Member Selection and Selected Activities for Family Members.

To View Categories (of Activities) & Activities (For Each Category)

Information listed in the Categories box is directly tied to the information listed in the Activities box.

11a. Categories – lists categories of activities that might be of interest to a member. Click on a Category to see a list of associated activities for that category (displayed in the Activities box).

11b. Activities – lists types of activities that might be of interest to the Member or anyone else in the member’s family.

NOTE: The Category list and the Activities list cannot be modified from this screen. To add, edit, or remove items on these lists, click the FRU Information tab in LCL.net as shown in the graphic at the lower left.
‘Activities’ Tab Screen (cont)

START HERE: Click a name (e.g., Clint Avery) to view or update activity interests for that person.

If this activity no longer interests the member, click Remove. The following prompt appears, asking you to confirm the action.
'Activities' Information (cont)

To Add Activities to a Member's Record

The Family Member Selection information is directly related to the Selected Activities for Family Member information.

11c. Family Member Selection – lists the member’s name and all other family names.

- Click a name to see a list of activities that are of interest to that person. This information will appear in the Selected Activities for Family Member box.

11d. Selected Activities for Family Member – lists activities that are of interest to the selected member or family member. If nothing appears in this list, activities for that person have not yet been added.

To Add/Remove Activities to a Member’s Record

- Click the desired family member in the Family Member Selection box. The selected member name will highlight and any previously entered activities for that member will appear in the Selected Activities for Family Member box. Referring to the graphic at the left, we can see that Clint Avery likes Rock & Roll Music.

NOTE: Click on Remove if the member no longer has interest in this activity. You will be prompted to confirm the action as shown by the graphic at the lower left.

- To add a new activity, click on a Category.
- Click on one of the Activities that displays for that Category.
- Click on Add Activity.
- Continue to select and add categories and activities for the selected family member, as needed.
- Repeat this procedure for a different family member if desired.
‘Member Search’ Go To Feature

Search by Member ID:

Double-click on the record to bring up the member’s information screen

OR

Click the + or click Select to bring up the member’s information screen

After Search is clicked, any record found will appear in the Result area.
Using the ‘Member Search’ Go To Feature

The Member Search feature can be used to quickly locate information about one of your Unit’s members. This feature allows you to search for a member within your Unit if you know the member’s:

- Member ID number;
- Name, or Partial Name; and
- State/Province (to further narrow the search)

The Member Search function is located in the Go To menu as shown in by the graphic at the top left.

**Search by Member ID**

- From the top menu bar, click Go To and then drop down to choose Member Search.
- In the Selection area, click By Member ID (as shown in the graphic at the lower left).
- In the Member ID Search area, type the Member ID (minus the leading zeros).
- Click the Search button. The Results area will display the record found for the Member ID # entered (e.g., Joe Walker’s Name, Address, and Status as shown in the graphic at the left).
  
  - Double-click the record to view detailed information; OR
  - Click on Select to bring up the member’s detailed record;
  - Click the + sign to the left of the Member ID to see the Lodge/Chapter/Moose Legion name and number that the member belongs to and then double-click on the FRU type to bring up a detailed member record.
‘Member Search’ Go To Feature (cont)

Go To Drop Down Menu

Search by Member Name this way:

Type whatever information you have about the member’s name. The system will find matches for you (e.g., ‘Hack’ brought up the record for Will Hacker)

Or, search by Member Name this way – choosing the State:

We typed in First Name only and then chose Illinois.

Two results were found: one for Will Hacker and one for William Ness.
Using the ‘Member Search’ Go To Feature (cont)

**Search by Member Name**

- From the top menu bar, click **Go To** and then drop down to choose **Member Search**.
- In the Selection area, click **By Member Name**.
- In the Name Search area, enter the entire member name (if you know it) or any part of the name that you do know.

  - You can enter a partial First Name (minimum of 1 character) or a partial Last Name (minimum of 3 characters).
  - In the example at the center left, we weren't sure how to spell the member's last name so we typed in a partial spelling (e.g., ‘Hack’).
  - In the example at the lower left, we typed in a First Name only and chose the state.

- Click the **Search** button. The Results area will display the record found for the Member Name information that you entered (e.g., Will Hacker’s record was found by both of the name searches shown at the left).

  - Make sure the desired member record is highlighted in the Results window. If it's not, click on the record to highlight it.
  - **Double-click the record** to view detailed information; OR
  - Click on Select to bring up the member’s detailed record;
  - Click the + sign to the left of the Member ID to see the Lodge/Chapter/Moose Legion name and number that the member belongs to and then double-click on the FRU type to bring up a detailed member record.

**Note:** Name Search performs a broad record search and may return multiple records. Narrow the search as much as possible to reduce the number of records located.
Lesson 3 – Self Check

18. A Member record can be accessed in the LCL.net Members tab by___ (see page 3-4).
   G. Type a Member ID# or last name in the ‘Find’ field
   H. Double-click on one row (in a member list) and click the View Member button.
   I. All of the above

19. Which of the following data does NOT display when you click the ‘Active’ tab in the LCL.net
    Members tab (see page 3-8)?
   H. Member ID#, name, address, and phone
   I. Member’s current status
   J. Member’s dues expiration date
   K. Member’s status change date

20. When you click the ‘Inactive’ tab on the LCL.net Members tab, a drop-down list will appear
    enabling you to narrow your search by selecting a specific inactive status (see page 3-8).
   E. True
   F. False

21. If a member has agreed to be on the Unit’s Volunteer list, check the ‘Volunteer box’ in the ___
    area of the member’s record (see page 3-12).
   H. Employment Information
   I. Contact Information
   J. Name Information

22. Which of the following dates can a Unit change about one of its members (see page 3-15)?
   F. Birthday
   G. Dues Expiration date
   H. Enrollment date
   I. 25 Club date

23. If a member has more than one area of residence, the ‘current address’ box must be checked
    in either the member’s ‘Current Address’ field or ‘Alternate Address field’ to identify the correct
    mailing address at any given point in time (see page 3-12).
    F. True
    G. False

24. Clicking the ‘Payments’ tab in a Member’s record shows when Moose International received
    the member’s dues and how much of that payment was deposited into the Unit’s bank
    account (see page 3-17).
    E. True
    F. False

25. Regardless of the LCL.net view you are in at any given point in time, you can always search for
    a Member using the ‘Go To / Member Search’ feature in LCL.net (see page 3-27).
    C. True
    D. False

Proceed to Lesson 4 – Applications Tab
Lesson 4 – Applications Tab

About this Lesson

The Applications tab is one of the four primary tabs used in LCL.net. Clicking the Applications tab gives you access to the Applications screen. This screen allows you to access, enter, edit, and delete applicant information within your Unit.

Objectives

After completing this lesson, you will be able to:

- Enter/Edit/Delete various types of member applications
- Enroll an applicant
- View messages from Moose International about application status

Topics

The following topics are included in this lesson:

- Application Screen Overview
- Application Screen Field Descriptions
- Enter an Application
- Edit an Application
- Enroll an Applicant
- Inactivate and Delete an Application
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The ‘Applications’ Screen

Initial Applications Screen (in View/Browse Mode):

Commonly Used Applications Buttons:

- **Can Enter Applications**: Allows you to enter a new application; opens a blank application window.
- **Can Check Application Status**: Opens the application that you entered for an Applicant that you selected from the Applicant List area.
- **Can Edit Applications**: Prints a list of applications – by the application ‘status’ selected.
- **Can Enter Applications**: Sends displayed information to your default printer.
- **Can Edit Applications**: Must be clicked to make changes to information.
- **Can Edit Applications**: Must be clicked to enter changes into the system.
- **Can Edit Applications**: Restores information to the previous data version.
- **Can Edit Applications**: Closes the Edit window without making changes. The system will ask if you want to exit without saving the changes.
Applications Screen Overview

Purpose

The Applications screen initially appears in a browse mode and looks similar to the graphic shown at the top left. Once accessed, the Applications screen allows you to:

15. Enter new types of applications for your Unit; OR
16. View and Edit application data already entered in LCL.net; OR
17. View the status of the applications that you’ve already entered in LCL.net and transmitted to Moose International for records processing.

Each of the above tasks is described in detail in this lesson.

Screen Formatting & Data Display Options

Refer to the screen formatting procedures covered in Lesson 1 if necessary to recall how to:

- View/print screens in a spreadsheet look; OR
- Resize columns; OR
- View display data in ascending/descending order

Commonly-Used Buttons

Some of the more-commonly used buttons that you will use when working within the Applications screen are shown, and described, at the lower left. Most of these buttons function the same as described in previous lessons. Buttons that are unique to the Applications screens are shown below:

- New Application button, and the
- View Application button
‘Applications’ Screen Overview (cont)

Example Applications Screen with ‘Active’ Tab clicked and (2) Active Applications Listed:

Status Tab Definitions:

Accepted: Application accepted by Moose International

Rejected: Application rejected by Moose International; requires Unit follow-up

Transmitted: Application transmitted to Moose International by the Unit

Active: Application entered in LCL.net by the Unit but not yet transmitted to Moose International

Other: Application that has been edited in some way (e.g., added enrollment date, deleted the application, etc.); waiting for the Unit to transmit to Moose International
Applications’ Screen Overview (cont)

Field Descriptions

Refer to the screen capture at the top left as the Applications screen fields are described below.

13. **Status Tabs** – after an application has been entered into LCL.net – and transmitted to Moose International for review – it will be assigned a status of: Accepted, Rejected, Transmitted, Active, or Other. Status assignment changes as daily two-way communications occur between the Unit and Moose International (referred to as ‘Application’ and ‘Daily Transmits’). Units MUST initiate these daily transmits in order for Moose International to view application requests. ‘Application Transmit’ and ‘Daily Transmit’ procedures are covered in Lesson 6.

   ➤ Click a status tab to view a list of all current applications with that status. Applications can be selected from the list for viewing or editing purposes. Access and Edit procedures are covered later on in this lesson.

14. **Application List Area** – lists status specific applications that are currently entered in LCL.net. Each record displays: the Application #, the Applicant’s Name, the Application Status, the Applicant’s Member ID # (for all but new member applications), and the application received date (received by the Unit).

   ➤ Select an application from the list to see detailed information about the individual’s application. The procedure for viewing/editing application data is covered later.

15. **Total [Status] Applicants** – total number of status-specific applications currently entered in LCL.net and recognized by Moose International. The total [status]# matches the total number of displayed records in the Application List Area. The screen capture shown at the top left shows that the Active status tab was clicked and the system pulled up two records having the Active application status. Click on another status tab to show a Total # of applicants having that status.
Partial Applications Screen Example – With First Name in the **Find** field:

Partial Applications Screen Example that found 'Johnson, Sammy' under the 'Other' tab:
Applications’ Screen Overview (cont)

**Field Descriptions**

Refer to the screen capture at the top left as the Applications screen fields are described below.

16. **Find** – field that is used to search for an application that may or may not have been entered already.

- Type all or part of a known application #, applicant’s first name, or applicant’s last name in the Find field (e.g., ‘Sammy’ as shown in the screen cap at the top left). The system will pull up any/all application records that match your search criteria.

- Click on each of the status tabs to see if the application you’re searching for appears under that status type. In our example at the lower left, an application for Sammy Johnson was listed when we clicked on the Other status tab.

Once you’ve found an application, be sure to open it and verify the data for accuracy before transmitting the information to Moose International.
New Application Screen

Example Applicant Information Screen:

1 - New
2 - Multiple Membership
3 - Re-Enroll
4 - Reinstatement
5 - Transfer In
6 - Comp Member
Enter a ‘New’ Application

Refer to the graphics at the left as the steps for entering an application are identified below.

→ Click the Applications tab.
→ Click the New Application button. An Applicant Information screen will appear similar to the one shown at the lower left.
→ **1a. Application** – Notice that the Application Number, Application Date, Application Status, and Date Entered fields are automatically populated for you*. Enter the date from the actual application!

*NOTE!: If you are entering a Multi-Membership, Re-enroll, Reinstate, or Transfer In application, you will enter the MID# since this type of member already has an MID# assigned to his/her record.

*NOTE?: If entering a Re-Enroll or Reinstate application and you do not know the Member ID#, click the ‘Don’t Know ID?’ button to view a list of former members. Select the member you’re re-enrolling or reinstating from the list (double-click or highlight the member and click Select). The former member details will automatically populate in the Applicant Information screen. Be sure to check all information for accuracy!

→ Choose the Application Code from the drop-down options to identify the application type that you are entering (as shown in the graphic at the lower left and as described below).

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-New</td>
<td>Never been a member</td>
</tr>
<tr>
<td>1-Multiple</td>
<td>Member from one Unit applying for membership in another</td>
</tr>
<tr>
<td>2-Re-enroll</td>
<td>Member in arrears for six (6) months or greater</td>
</tr>
<tr>
<td>3-Reinstate</td>
<td>Dropped member (dues elapsed more than 12 months but less than 24)</td>
</tr>
<tr>
<td>5-Transfer In</td>
<td>Active member from one Unit transferring into your Unit</td>
</tr>
<tr>
<td>L-Comp</td>
<td>Non-member wishing to receive your mailings. NOTE: saving this application makes the member Inactive! Information is not transmitted to Moose International.</td>
</tr>
</tbody>
</table>

**NOTE**: Life Member information is entered by Moose International and downloaded to the Unit via the LCL.net Transmit process.
Applicant Information Screen (cont)

Example ‘New’ Applicant Information Screen:

NOTE: A field will appear in Chapter and Moose Legion views above the ‘Report information area as shown above in 1a.
Enter a ‘New’ Application (cont)

Based upon the Application Code that you selected in the previous step, another Applicant Information window will appear enabling you to enter more information about the Applicant (see the graphic at the top left.

➤ **1a. Application (cont)** – check the Fees Paid and Dues Paid boxes IF you received the dues and fees payment from the New Applicant.

**NOTE:** Dues, Fees, and checkboxes apply to Multi-Membership and Re-enroll Applicants as well (discussed later).

➤ Reinstall Applications require payment of current as well as back dues.

➤ Transfer In applications require Fees payment only.

➤ Comp Member applications do not require dues or fees payment.

➤ **1b. Name Information** – enter as much information that is known about the Applicant’s name.

➤ **1c. Address Information** – enter the Applicant’s address (from the actual application).

**Note:** If you cannot enter or validate an address for some reason, the system will prompt you to enter the Unit’s City, State, Zip, and Country (see below). Choose Yes to accept the unit’s address if desired.

➤ Enter the Applicant’s birthday; this is a required field! Enter in this format mm/dd/yyyy or choose the date from the drop-down calendar.

➤ **1d. Contact Information** – enter the Applicant’s Home Phone # and Cell Phone # (if applicable and known) as well as the Applicant’s personal email address.
Applicant Information Screen (cont)

Example ‘New’ Application Screen (cont):

Example Sponsor List Screen:
Enter a ‘New’ Application (cont)

Continue with the steps below to complete the process for entering a new application in LCL.net.

➔ 1e. Sponsor – if entering an application for a New, Multi Membership, or Re-Enroll application, enter the MID# for the Applicant’s Sponsor (as recorded on the application). You do not need to enter Sponsor information if completing a Reinstates, Transfer In, or Comp Member application.

**NOTE:** If you do not know the Sponsor MID#, click the Select button to pull up a list of sponsors for the Unit (similar to the graphic shown at the lower left). If the Sponsor’s name appears on the list, double-click on the Sponsor record (or highlight the record and click Select). The selected Sponsor details will automatically populate in the Sponsor area of the application. If the Applicant’s Sponsor is from another unit, please refer to the ‘Out of Lodge Sponsor’ procedure found in Lesson 5 – Sponsors Screen.

➔ 1f. Enrollment – the Enroll Date (e.g., date applicant’s orientation has been completed) can only be entered by the Unit after the initial application has been accepted by Moose International. After you’ve performed your application and daily transmits, and have received the Accepted application message from Moose International, you can then edit the application to add the Enrollment date.

- Refer to the *Edit an Application* procedure on Page 4-27.
- Refer to the *Enroll an Application* procedure on Page 4-29.

➔ 1g. Family Information – enter known information about the Applicant’s family (e.g. married, # of children, etc.).

➔ 1h. Employment Information – enter as much information as you know about the Applicant’s job (e.g., occupation, employer, and business phone #).

- Click Save to save the application.
- Click Close.
‘Multi-Membership’ Application Screen

Example ‘Multi-Membership’ Applicant Information Screen: 1-Multiple Membership Already Chosen

MID #: First field that you are prompted to enter!
Enter a ‘Multi-Membership’ Application

The overall process for entering a Multi-Membership application is basically the same as the previously described procedure for entering a New Application. We’ll point out the differences between a New Application and a Multi-Membership Application below.

➔ 1a. **Application** – Choose 1 – **Multi Membership** from the Application drop-down options. This option appears for Lodges and Chapters only. Moose Legionnaires wishing to be a member of another Moose Legion, must follow the ‘New Application’ procedure described on the previous page.

A “Ballot Date” appears for Chapters in this section.

The screen capture shown at the top left has already made this selection and is, therefore, already in the Edit mode.

➔ Enter the MID# for the Multi-Membership Applicant.

➔ You may receive a prompt similar to the one shown at the lower left. Click ‘Yes’ if you would like to connect to Moose International to retrieve the Applicant’s information. If you do, the member’s information will automatically populate in the Applicant Information window.

➔ Similar to a New Application, Multi-Membership Applicants must pay dues and fees. If payment has been received, click both the **Fees Paid** and **Dues Paid** boxes.

➔ 1b. **Name Information** – same fields as a New Application

➔ 1c. **Address Information** – same fields as New Application

➔ 1d. **Contact Information** – same fields as a New Application

➔ 1e. **Sponsor** – same fields/process as a New Application

➔ 1f. **Enrollment** – Multi-Membership Applicants do NOT need to attend an enrollment ceremony. They already did so at their other unit.

➔ 1g. **Family Information** – same as a New Application.

➔ 1h. **Employment Information** – same as a New Application.

➔ Click **Save**.

➔ Click **Close**.

‘Re-Enroll’ Application Screen
Partial ‘Re-Enroll Applicant Information Screen: 2 - Re-Enroll Already Chosen:

MID #: First field that you are prompted to enter!

Partial ‘Re-Enroll Applicant Information Screen: Auto-Populated Applicant Info:

Applicant information auto-populates if the system recognizes the MID# entered.
Enter a ‘Re-Enroll’ Application

The overall process for entering a Re-Enroll application is basically the same as the previously described procedure for a New Application (refer back to Page 9 if necessary). We’ll point out the differences between a New Application and a Re-Enroll Application below.

1a. Application – Choose 2 – Re-Enroll from the Application drop-down options. The screen capture shown at the top left has already made this selection and is, therefore, already in the Edit mode.

1b. Name Information – same fields as a New Application
1c. Address Information – same fields as New Application
1d. Contact Information – same fields as a New Application
1e. Sponsor – required entry; same fields as a New Application
1f. Enrollment – same fields/process as New Application (enter enroll date/ballot date after Unit has received an application acceptance message in LCL.net).
1g. Family Information – same as a New Application.
1h. Employment Information – same as a New Application.

Click Save.
Click Close.
‘Reinstate’ Application Screen

Partial ‘Reinstate’ Applicant Information Screen: 3-Reinstate Already Chosen:

- MID #: First field that you are prompted to enter!

Partial ‘Reinstate’ Applicant Information Screen: Auto-Populated Information:

- Data automatically populates if MID# is found.
- Requires Dues payment only!
Enter a ‘Reinstate’ Application

The overall process for entering a Reinstate application is basically the same as the previously described procedure for a New Application (refer back to Page 9 if necessary). We’ll point out the differences between a New Application and a Reinstate Application below.

1a. **Application** – Choose 3 – Reinstate from the Application drop-down options. The screen capture shown at the top left has already made this selection and is now in the Edit mode.

1b. **Name Information** – same fields as a New Application

1c. **Address Information** – same fields as New Application

1d. **Contact Information** – same fields as a New Application

1e. **Sponsor** – re-entry of the Sponsor information is NOT required for a Reinstated member. The Reinstated member’s Sponsor information is maintained since the member has not yet been terminated in the system.

1f. **Enrollment** – same fields/process as New Application (enter enroll/ballot date after Unit has received an application acceptance message in LCL.net.

1g. **Family Information** – same as a New Application.

1h. **Employment Information** – same as a New Application.

-> Click **Save** and then click **Close**.
‘Transfer In’ Application Screen

Example ‘Transfer In’ Applicant Information Screen: 5-Transfer In Chosen:

MID #: First field that you are prompted to enter!

Partial ‘Transfer In’ Applicant Information Screen – with retrieved data:

Data automatically populates if MID# is found.

Requires Fees payment only!
Enter a ‘Transfer In’ Application

The overall process for entering a Transfer In application is basically the same as the previously described procedure for a New Application (refer back to Page 9 if necessary). Differences between a New and Transfer In Application are described below.

1a. Application – Choose 5-Transfer In from the Application drop-down options.

- Enter the MID# for the Transfer In Applicant and hit the Enter or Tab key. When prompted, to connect to Moose International and retrieve the member’s information, click Yes. If the MID# is found, previously entered information about the Applicant will auto-populate (as shown in the partial screen capture at the lower left). Review this information for accuracy.

NOTE: Transfer ‘From’ and Transfer ‘To’ Units have 14 days to discuss any potential transfer issues. After 14 days, a ballot date can be entered and the application can be transmitted to Moose International.

- Transfer in Fees must be paid by the Transfer In Applicant. Dues are not required since the Transfer In member is current with his/her dues in his/her current Unit. If the Fees payment has been received, click the Fees Paid box.

1b. Name Information – same as a New Application.

1c. Address Information – same as a New Application.

1d. Contact Information – same as a New Application

1e. Notes – Transfer In Applicants do not require Sponsor data entry.

1f. Enrollment – Transfer In Applicants do NOT need to be enrolled again.

1g. Family Information – same as a New Application.

1h. Employment Information – same as a New Application but adds a ‘Previous Lodge’ data field for you to enter.

- Click Save to save the application and then Close to exit.
'Comp Member' Application Screen

Example ‘Applicant Information Screen: L-Comp Member Already Chosen:

No Dues or Fees Required!

No Enrollment Required!
Enter a ‘Comp Member’ Application

The overall process for entering a Comp Member application is basically the same as the previously described procedure for a New Application (refer back to Page 9 if necessary). We’ll point out the differences between a New Application and a Comp Member Application below.

1a. Application – Choose L- Comp Member from the Application drop-down options.
   - Comp Members do not pay dues and fees; therefore, those boxes are grayed out.

1b. Name Information – you are immediately prompted to enter the Comp Member’s name.

1c. Address Information – same as a New Application.

1d. Contact Information – same as a New Application.

1e. Notes – enter any notes about the Comp Member if desired. Comp Members do NOT require Sponsors.

1f. Enrollment – Comp Members do NOT need to be enrolled. Therefore, this area is grayed out. Save to save the application.

1g. Family Information – same as a New Application.

1h. Employment Information – same as a New Application.

Click Save.

Click Close.
Edit Application Screens

Example Access to an ‘Active’ Application:

Example ‘Active’ Application in Edit mode (Edit button already clicked):
Edit an ‘Active’ or ‘Accepted’ Application

Follow the steps below to edit data for an ‘Active’ or ‘Accepted’ Application (already entered in LCL.net).

➔ Click the Applications tab.
➔ Click the Active or the Accepted Status tab. The graphic at the upper left shows that the Active status tab was chosen.
➔ Double-click on an Application record from the Applications List Area (or highlight an Application record and click View Application). The graphic at the left shows that we want to view/edit Harry Smith’s application.
➔ After the application displays, click the Edit button. A view similar to the one at the bottom left will appear.
➔ Add or change data in the editable (white) fields as necessary (e.g., email or street address change, etc.)
➔ Click Save and then click Close.

Edit a Rejected Application

Should Moose International reject an application, the reason for the rejection can be found in the ‘notes’ section on the application. Follow the steps below if the rejected application simply requires a follow-up correction by the Unit:

➔ Change the Rejected application to an Active status. Save the change.
➔ Open the Active application.
➔ Click the Edit button and make any applicable changes to the application.
➔ Save the updated application.
➔ Close the application.
‘Enrolling’ An Applicant Screens

Example ‘Accepted’ Application List:

Criteria for Enrolling an Application:
‘Enroll’ An Applicant

Process Review

When an application is ready to be enrolled in LCL.net, it is necessary to move a member’s accepted application to an Active status. Before this change can be made in LCL.net, certain criteria must be met. Refer to the graphic at the lower left as the enrollment criteria is described below:

- Member ID # must already be assigned.
- Member’s application status must be ‘Accepted’ in LCL.net.
- Member’s fees and dues have been paid.
- An Enroll Date must be entered in the Enroll Date box.

To Enroll an Application:

Refer to the example graphic at the top left as the procedure for enrolling an applicant/application in LCL.net is described below:

➡ View an accepted member application.
  ➡ Click the Accepted tab.
  ➡ Open an application from the Accepted Applications List

➡ 1a. Application –
  ➡ Verify that an MID # has been assigned (see screen header).
  ➡ Verify that the Application Status shows ‘Accepted’
  ➡ Verify that fees and dues have been paid (boxes checked).
  ➡ Click the Edit button.

➡ 1f. Enrollment – enter the applicant’s Enroll date and then click the Save button.
.jwt

‘Enrolling’ An Applicant Screens (cont)

‘Enroll the Applicant’ prompt:

Status after 1st Application / Daily Transmit to Moose Int’l:
- from the Applications tab:

Status after 2nd Application / Daily Transmit to Moose Int’l:
- from the Applications tab:

- from the Members tab:
‘Enroll’ An Applicant (cont)

To Enroll an Application (cont):

- After you enter the Enroll/Ballot Date and click the Save button, a prompt similar to the one shown at the top left will appear – if the accepted application has met all of the enrollment requirements.

- Click Yes to enroll the applicant in LCL.net.

- Perform an Application Transmit and Daily Transmit. Refer to the two screen captures in the middle of the page at the left. Notice that the application moves to the ‘Other’ status tab and the member now appears as ‘newly-enrolled’ in the Unit’s Active members list.

- Perform a second Application Transmit and Daily Transmit. Refer to the two screen captures at the lower left. If Moose International acknowledged the enrollment date and identified the newly enrolled member’s dues expiration date, the application will no longer appear in the ‘Other’ tab. The newly enrolled member will now appear as ‘Active’ on the Unit’s Active members list.

NOTE: If you chose ‘No’ above (when prompted to enroll the applicant), do not forget to complete the enrollment / transmission processes at a later date!
Inactive & Deleted Application Screens

Edit already selected:
Inactivate & Delete an Application

There are times when you must change an application status to Inactive or Delete in the system. Before an application can be deleted in the system, the status must first be changed to Inactive.

1) To Inactivate an Application:

➢ Click the Applications tab.
➢ Click the Active Applications tab (or the Accepted tab or Rejected tab).
   ➢ After the Applications list displays, double-click the desired Application in the list (or highlight the Application in the Application list and click View Application).
➢ Click the Edit button.
➢ Click the Status drop down arrow and select **Inactive**.
➢ Click the Save button. The Application record will be updated to show the Inactive status change. At this point, a choice can be made to keep the Application in an Inactive Status or to permanently delete it.
   ➢ Click the Close button to keep the application Inactive; OR
   ➢ Click the Edit button to now change the Inactive Status to Delete.

2) To Delete an Application:

➢ Click the Applications tab.
➢ Click the ‘Other’ Applications tab.
   ➢ Select the **Inactive application** from the applications list.
➢ Click the Edit button.
➢ From the Status drop down options, select **Delete**.
➢ Click the Save button. The Application record will be immediately deleted during the next ‘Application Transmit’ (described in Lesson 6).
Lesson 4 – Self Check

26. To enter a New Member application in LCL.net, you must first click the New Application button and then choose ‘1-New’ from the Application Code drop down box (see page 4-8).
   J. True
   K. False

27. The LCL.net Applications tab enables you to check ____ application status at any time (see page 4-4).
   L. Accepted
   M. Rejected
   N. Transmitted
   O. Active
   P. All of the above

28. Which of the following steps describes an ‘Accepted’ application (see page 4-7).
   G. Unit entered the application in LCL.net
   H. Unit transmitted the application to Moose International
   I. Moose International received the application
   J. Moose International reviewed the application and transmitted back to the Unit
   K. All of the above

29. Moose International transmits a new MID# for Re-enroll and Reinstat Applicants (see page 4-9).
   K. True
   L. False

30. If a Sponsor’s MID# was inadvertently left off of an application, the MID# can be located in LCL.net (see page 4-13).
   J. True
   K. False

31. An active Moose Member wishing to transfer his/her membership to your Unit does not need to pay dues fee; he/she only needs to remit a transfer fee (see page 4-21).
   G. True
   H. False

32. Submitting a New Member application is a 4-step process at minimum: 1) transmit, 2) receive back, 3) transmit, and 4) receive back (see page 4-31).
   E. True
   F. False

33. If you ‘inactivate’ an ‘active’ application in your LCL.net database, the inactive application will appear in the ‘Other’ application status tab until you delete it (see page 4-33).
   A. True
   B. False

Proceed to Lesson 5 – Sponsors Tab
Lesson 5 – Sponsors Screen

About this Lesson

The Sponsors tab is one of the four primary tabs used in LCL.net. Entering Sponsor information is a required step when entering a new, multi-membership, and/or re-enroll application in LCL.net. Sponsor information must be retrieved, and saved into the Unit’s LCL.net Sponsor list before the Sponsor’s MID number can be entered on an Applicant Information screen.

Clicking the Sponsors tab gives you access to Out-of-Unit Sponsors (or Sponsors from another Unit) that may be identified on a member application. This screen is used to view Out-of Lodge Sponsor data, add that data to your Unit’s Sponsor list, and then edit or delete information as necessary per the needs of the unit.

Objectives

After completing this lesson, you will be able to:

- Access/View Out-of-Unit Sponsor data
- Add an Out of Lodge Sponsor to your Unit’s Sponsor List
- Edit or Remove Out-of Lodge Sponsor data

Topics

The following topics are included in this lesson:

- Sponsor Screen Overview
- Sponsor Screen Field Descriptions
- View, Create, and/or Remove Out-of-Unit Sponsor
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‘Sponsors’ Screen

Initial Sponsor Screen (in View/Browse Mode):

Commonly Used Sponsors Buttons:

- **Add New Out-of-Unit Sponsor**
  - Allows you to enter a new Out-of-Unit Sponsor to your Sponsor List; opens a blank Sponsor window

- **View, Refresh, or Remove Out-of-Unit Sponsors**
  - Opens the data record for the Out-of-Unit Sponsor that you selected from the Sponsor List area
  - Prints a list of Sponsors – by the application ‘status’ selected
  - Removes the Sponsor record entirely. *Sponsors having Sponsor Records in their membership file cannot be removed*
  - Retrieves current Out-of-Unit Sponsor information from Moose International; Refresh button changes to ‘Save’ button after refreshed data appears
  - Appears after a ‘Refresh’ completes; when clicked, enters the updated information into the system
  - Restores the Member ID field to a blank when in the New Mode. *When in the Browse Mode the Reset Button is not functional.*
  - Closes the record without saving changes.
Sponsors Screen Overview

Purpose

The Sponsors screen initially appears in a browse mode and looks similar to the graphic shown at the top left. Once accessed, the Sponsors screen allows the Unit to:

- Retrieve information about Out-of-Unit Sponsors, and/or
- Add, refresh, or remove an Out-of-Unit Sponsor’s Information record to/from the Unit’s LCL.net Sponsor list.

Some of the information that you will be able to retrieve about an Out-of-Unit Sponsor includes: the Sponsor’s name, address, phone number, membership status, dues expiration date and unit name and number.

NOTE: Lodge members who sponsor Applicants into your Unit will already be in your LCL.net database - as your Unit’s Members.

Screen Formatting & Data Display Options

Refer to the screen formatting procedures covered in Lesson 1, if necessary, to recall how to:

- View/print screens in a spreadsheet look; OR
- Resize columns; OR
- View display data in ascending/descending order

Commonly-Used Buttons

Some of the more commonly used buttons that you will use when working within the Sponsors screens are shown below and described, at the left. Buttons unique to the Sponsors screens are:

- New Sponsor and View Sponsor buttons
- Refresh and Remove buttons
‘Sponsors’ Screen (cont)

Initial Sponsor Screen:

1. Sponsor List Area (one Sponsor shown in this list)

2. Total Sponsors: 1

3. Refresh to connect to Moose Int’l and then Save the changes!

View Sponsor – Sponsor Information Screen:

Deletes the entire Sponsor Record
Sponsors Screen Overview (cont)

Field Descriptions

After the Sponsors tab has been selected, a list of Out of Lodge Sponsors appears (see screen at top left). At this point, you can View/Refresh Sponsor information for your Unit, or you can add a New Sponsor to your Unit’s Out-of-Unit Sponsor List. Refer to the screen capture at the top left as the Sponsors screen fields are described below and on the next several pages.

17. Sponsor List Area – lists previously entered Out-of-Unit Sponsors that have sponsored members into your Unit. The following information is displayed for each Sponsor appearing in this list: Member ID, Name, Unit Number, Unit Name, Membership Status, and Dues Expiration Date.

- Selecting a Sponsor from the list, and then clicking the View Sponsor button, will bring up additional information about the selected Sponsor (e.g., Unit #, Unit Name, membership status, dues expiration date; and Sponsor name/address/contact information and Sponsor’s MID#).

18. Total Sponsors – total number of Out-of-Unit Sponsors that have been entered in LCL.net for your Unit. This number matches the list (rows) of Sponsors in the Sponsor List Area.

19. View Sponsor – when clicked, this button allows you to quickly view, and then ‘refresh’ Sponsor Information (if necessary) for one of your Unit’s Out-of-Unit Sponsors (see example screen shown at the lower right).

- You cannot edit Sponsor Information; thus, an Edit button does not appear. Sponsor Information is updated by a Moose International download using the ‘Refresh’ button shown on the screen at the lower left. Saving this downloaded information is the only way that you can update Sponsor Information.

- Clicking the ‘Remove’ button will delete the Sponsor Record from your Unit’s list of Out-of-Unit Sponsors.
‘Sponsors’ Screen (cont)

Initial Sponsor Screen:

New Sponsor Information Screen:

View Sponsor Information Screen:

Enter MID# and click Find to auto-populate Sponsor’s information.

Click Refresh and Save!

Same Information Fields, different ways to auto-populate the Sponsor Information fields.
Sponsors Screen Overview (cont)

Field Descriptions (cont)

Refer to the graphics at the left as the remaining Sponsor Information fields are described below.

20. **New Sponsor** – when clicked, this button allows you to add an Out-of-Lodge Sponsor to your Unit’s Sponsor List. A Sponsor Information screen similar to the one shown at the lower left appears. Sponsor Information fields that appear here are the same as those that appeared when the View Sponsor button was clicked).

Differences between the New and View Sponsor Information screens (shown at the lower left) are as follows:

- The New Sponsor Information screen does NOT contain a “Refresh’ button; the View ‘Sponsor Information’ screen does.
- The New Sponsor Information Screen prompts you to enter an MID# for the Sponsor and then click the Find button. The View Sponsor Information screen already displays the MID#.

Both the New and View Sponsor Information screens contain the following information fields:

- **a. FRU Information** – Sponsor’s Unit # and Name, membership status, and dues expiration date
- **b. Name Information** – Sponsor’s name
- **c. Address Information** – Sponsor’s address
- **d. Contact Information** – Sponsor’s phone #

5. **Find** – clicking the Find button can be used to quickly locate an Out-of-Unit Sponsor’s record simply by typing in an MID# (if known) or a last name, first name, and/or partial name.

**NOTE:** If working within the New Sponsor Information screen (as shown in the graphic at the lower left), enter the Out-of-Unit Sponsor’s MID# and then click Find. If recognized by Moose International, data will automatically populate in your screen.
‘View Sponsor’ Screens

View an Out-of-Unit Sponsor:

‘Refresh’ Changes show that the Out-of-Unit Sponsor is now an active member of Lodge 9996 and now has a contact phone #.
View an Out-of-Unit Sponsor

Follow the steps below to view information about one of your Unit’s Out-of-Unit Sponsors.

 Click the Sponsors tab.

 Double-click on a Sponsor row from the Sponsor List Area (or highlight and click View Sponsor).

 Click the Refresh button to check for Sponsor Information updates. If the data changes on your screen, you have received updated Sponsor Information from Moose International. The bottom of the Sponsor Information screen will also alert you that the member information was retrieved successfully (as shown at the bottom of the lower-left graphic).

NOTE: If the data does not change on your screen, your information is current. Click the Close button to exit. It is highly recommended that you ‘refresh’ an Out of Lodge Sponsor’s information each time you use him as a Sponsor – just to be sure that your records match Moose International’s records.

 Notice in the example at the lower left that the Sponsor Information did update (e.g., Lodge #, name, dues expiration date, and contact phone #). Notice, also, that the Refresh button changed to ‘Save.’

 Click Save.

 When prompted, choose ‘Yes’ to update the Sponsor’s Information in your Unit’s records.

NOTE: This newly saved Out-of-Unit Sponsor information will appear in the Sponsor list the next time the Sponsor List is accessed.
‘Create Sponsor’ Screens

Create an Out-of-Unit Sponsor:
Create an Out-of-Unit Sponsor

Refer to the graphics at the left as the procedure for adding new Sponsor information to your Unit’s Out-of-Unit Sponsor list is discussed below.

➔ Click the Sponsors tab.
➔ Click the New Sponsor button.
➔ Type the Out-of-Unit Sponsor’s MID#.
➔ Click the Find button.

➔ If the MID# is recognized by Moose International, the Sponsor’s data will automatically populate in the Sponsor Information window.

➔ Click the Save button to accept the Sponsor’s information and add this New Sponsor’s name to your Sponsor list.

NOTE: Clicking the ‘Reset’ button will remove any auto-populated Sponsor Information retrieved from Moose International.

➔ Click Close to exit the Sponsor Information window.

➔ If the MID# is not recognized by Moose International, you may see an error message similar to the one shown at the lower left – indicating that the MID # is not on file with Moose International.

➔ Refer to the member application to verify the MID# if necessary.
➔ Click the Save button.
➔ Click Close to exit the Sponsor Information window.

NOTE: This newly added Sponsor will appear in the Sponsor list the next time the Sponsor List is accessed.
‘Remove Sponsor’ Screens

Remove an Out-of-Unit Sponsor:
## Remove an Out-of-Unit Sponsor

Refer to the graphics at the left as the procedure for removing an Out-of-Unit Sponsor from your Unit’s Sponsor List is discussed below. Be aware that this procedure will only work IF the previously entered Out of Lodge Sponsor has not yet sponsored anyone from your Unit (see note below).

- Click the **Sponsors** tab.
- **Double-click a Sponsor** from the Sponsor list (or highlight the Sponsor and click View Sponsor).
- After the Sponsor's information appears (as shown in the graphic at the left), click the **Remove** button.

**NOTE:** **You must be in Browse mode to remove a Sponsor.**

- When prompted, click **Yes** to remove the Sponsor from your Unit’s Sponsor’s list.
- Click the **Save** button.

**NOTE:** An Out of Lodge Sponsor cannot be removed if there is a Sponsor Record in your Lodge database. An Error Message will appear when you click the Remove button telling you “Sponsor cannot be deleted because they have sponsored members or applicants.”
Lesson 5 – Self Check

34. An active member from another Unit can sponsor a member into your Unit (see page 5-1).
   L. True
   M. False

35. Assume you’ve pulled up the Sponsor Information screen for one of your Out-of-Unit Sponsors via the View Sponsor tab, but you’re not sure if the Sponsor’s personal information is current. What should you do next (see page 5-5)?
   Q. Click ‘Refresh’ and then ‘Save’
   R. Assume the information is accurate since there is not an “Edit” button
   S. Call Moose International

36. After you click the ‘New Sponsor’ tab, you will be immediately prompted to enter the Out-of-Unit Sponsor’s MID# and then click ‘Find’ (see page 5-9).
   M. True
   N. False

37. What does it mean if you click the ‘View Sponsor’ button and data does not appear (see page 5-7)?
   L. You have not entered any Out-of-Unit Sponsors for your Unit
   M. You need to perform a Daily Transmit immediately
   N. You need to buy a new computer

38. If you’ve added an Out-of-Unit Sponsor to your Unit’s LCL.net database, you ____ remove that Sponsor if the Sponsor has already sponsored a member in your Unit (see page 5-15).
   H. can
   I. cannot

39. A Unit can edit an Out-of-Lodge Sponsor’s mailing address simply by clicking the Edit button, making the applicable changes, and then saving the record (see page 5-7).
   J. True
   K. False

----------------------------------------

Proceed to Lesson 6 – Transmit Functions
Lesson 6 – Transmit Functions

About this Lesson

This lesson will demonstrate how to use two separate LCL.net Transmit features – 1) the ‘Application Transmit’ and 2) the ‘Daily Transmit.’ Used in conjunction with each other, these two transmit features enable two-way communications between the Unit and Moose International.

More specifically, these features allow the Unit to transfer information about the Unit in general, about its individual members, and about pending applications to Moose International, as well as, receive information back from Moose International.

NOTE: Examples screen/graphics included in this lesson were captured from a simulated WOTM Chapter. The procedures described in this lesson apply to all fraternal units.

Objectives

After completing this lesson, you will be able to:

• Perform an ‘Application Transmit’ to Moose International
• Perform a ‘Daily Transmit’ to Moose International
• View, and respond to, messages sent by Moose International

Topics

The following topics are included in this lesson:

• Application Transmit Overview
• Transmit an Application(s)
• Daily Transmit Overview
• Perform a Daily Transmit
• Troubleshooting Error Codes
• Other Transmit Features
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‘Application Transmit’ Overview

Commonly Used Transmit Buttons:

- **Select All**
  - Allows you to choose all applications listed

- **Deselect All**
  - Allows you to uncheck all previously-selected applications

- **Transmit**
  - Begins the transmission process to Moose International

- **Connect To Moose International**
  - Connects you to Moose International (requires an Internet connection)

- **Close**
  - Closes the window.
‘Application Transmit’ Overview

**Purpose**

The ‘Application Transmit’ feature allows Units to:
- Transmit active applications to Moose International for processing;
- View a list of applications that were sent to Moose International for processing; and
- View the status of the applications that were processed by Moose International.

Please be aware of the following as you work with the Transmit feature:
- An Internet Connection is required to transmit data!
- An ‘Application Transmit’ must be performed before a [Daily Transmit] can be performed!
- Perform a ‘Daily Transmit’ every day to ensure that you receive information from Moose International in a timely fashion – even though you might not have anything new to send!
- You must perform the Transmit; Moose International cannot do this for you!

**Commonly-Used Buttons**

Some of the more-commonly used buttons that you will use when working with the Transmit feature are shown/described, at the left.

**Access the Application Transmit Menu Option**

Refer to the graphic at the top left and the text below, to access the Application Transmit option as follows:

⇒ From the top menu bar, click Go To.
⇒ Choose Application Transmit from the drop-down options.
Transmit Applications Screen

Application Transmit Initial Screen – Active Applications for an Example Chapter:

‘Active, Transmitted, Received’ Application Tabs
(e.g., ‘Active Applications’ tab selected below)

Application List Area

Quick View number of ‘Active, Transmitted, and Received’ Applications

‘Select All’ and ‘Deselect All’ buttons.
Transmit Applications Screen

Field Descriptions

Refer to the example Chapter screen capture at the top left as the Application Transmit feature and fields are described below.

21. **Header Area** – this section is populated by LCL.net and cannot be changed by the Unit. Depending upon the Unit type, this section identifies the Office of the Administrator, Recorder, or Secretary as well as the date and time of the last transmission to Moose International.

22. **Active Applications tab** – when clicked, displays a list of all active applications that the Unit has entered but not yet transmitted. Notice in our example at the left, that the Chapter has (3) Active Applications entered in the system. Each active application identifies:
   - App ID – or the Applicant’s application ID number
   - Name – the Applicant’s name
   - Type – the type of application that was entered
   - Status – the current status of the application
   - App Received Date – the date the Unit received the application

**NOTE:** Click, or unclick, in the checkbox(s) in the ‘Select’ column to choose applications that you wish to transmit. Or, click the ‘Select All’ or ‘Deselect All’ buttons if applicable.

23. **Transmitted Applications tab** – when clicked, displays a list of all applications that the Unit transmitted to Moose International but have not yet been processed by Moose International.

24. **Received Applications tab** – when clicked, displays a list of all applications that have been processed by Moose International. Application status will be updated (e.g., Accepted, Rejected, or Exception) and will require further action by the Unit.

25. **Transmit button** – when clicked, initiates the Unit’s transmit communications with Moose International.
Transmit Applications Screens (cont)

Choose an Application(s) to Transmit – Example Chapter Screen:

Click to perform the ‘Daily Transmit’ now; or close the window and perform the Daily Transmit later!
Transmit an Application(s)

Refer to the example screen capture at the top left as the Application Transmit steps are described below. Remember – you need be connected to the Internet in order to complete the transmit successfully.

➔ Open an Internet connection.
➔ From the LCL.net Go To menu, choose Application Transmit.
➔ Click the Active Applications tab.
➔ Choose the applications that you want to transmit:
  ➔ Click in the box to the left of each application; OR
  ➔ Click the Select All button.

➔ Click the Transmit button.
  ➔ A connection will be initiated between your LCL.net software and the Moose International server. The status bar will display the steps in the transmission process and will alert you when all Applications have been transmitted.

➔ After the applications have transmitted, the LCL.net Warning appears (as shown at the left) reminding you to perform the required ‘Daily Transmit.’ Proceed with one of the following options.
  ➔ Click OK to open the ‘Daily Transmit’ window and perform the Daily Transmit. (The Daily Transmit procedure is described on the next page); OR
  ➔ Close the Warning prompt and perform the Daily Transmit later.*

➔ If desired, click the ‘Transmitted Applications’ tab to verify that the selected applications transmitted successfully and appear in the ‘Transmitted Applications List (similar to the screen capture shown at the lower left).

*NOTE: Do not forget to perform the ‘Daily Transmit’ if you opted to close the LCL.net Warning prompt earlier!
Transmitted Applications Screen

Verify Status of ‘Transmitted Applications’ – Example Chapter data shown below:

Lists applications that were transmitted by the Unit, but not yet processed by Moose International

Lists applications that were accepted and/or rejected by Moose International and any related messages about the status if applicable (e.g., no Sponsor record found).

Requires follow-up by the Unit!

View Status/Messages of ‘Received Applications’:
View Status of Transmitted Applications

After you’ve performed an Application Transmit, you can view a list of applications that were transmitted and/or view any updates or messages about the applications that were processed by Moose International and returned to you for follow-up.

View ‘Transmitted Applications’ (by the Unit)

Follow the steps below to view a list of applications that were recently transmitted to Moose International.

- Open an Internet connection.
- From the LCL.net Go To menu, choose Application Transmit.
- Click the ‘Transmitted Applications’ tab (as shown in graphic at the left). A list of transmitted applications will appear if applicable to your daily operations (similar to the example at the left). Recall that Moose International has not yet processed the applications listed here.

View ‘Received Applications’ Status (from Moose Int’l)

Follow the steps below to view the status of applications that were processed by Moose International and returned to the Unit.

- Open an Internet connection.
- From the LCL.net Go To menu, choose Application Transmit.
- Click the ‘Received Applications’ tab (as shown in graphic at the left). All applications that have been processed by Moose International will appear in this list. All applications in this list require follow-up by the Unit (see below):
  - Accepted applications – are ready for enrollment.
  - Rejected applications – require a correction or additional follow-up by the unit before Moose International will accept them. Also requires a re-transmit to Moose International.
  - Enroll the applicant in LCL.net, or correct the rejected application.
  - Re-Transmit the updated application to Moose International.
‘Daily Transmit’ Screen

Warning that ‘Application Transmit’ needs to be performed!

Warning that ‘Daily Transmit’ needs to be performed!

‘Daily Transmit’ Initial Screen – for an example Chapter:

1. **Send Date/Time:**
   - Send Date/Time: 07/29/2011 02:11:57 PM
   - Completed: Yes
   - Completed Date/Time: 07/29/2011 02:11:57 PM

2. **Synchronization**
   - Synchronization:
     - Send:
       - 07/29/2011 02:11:57 PM
     - Receive:
       - 07/29/2011 02:11:57 PM
     - Messages:
       - 07/29/2011 02:11:42 PM
       - 07/29/2011 02:10:41 PM
       - 07/29/2011 02:10:39 PM
       - 01/22/2007 10:42:30 PM

3. **Fraternal Unit**
   - Lists any Fraternal Unit updates (e.g., address/email/phone # changes) ready to send to Moose Int’l.

4. **Member**
   - Lists any Member updates (e.g., address/status changes) ready to send to Moose Int’l (if any).

5. **Fraternal Unit Rates**
   - Lists any Fraternal Unit Rates updates (e.g., dues rate changes) ready to send to Moose Int’l.

6. **Connect To Moose International**
   - Connect To Moose International
   - Close
‘Daily Transmit’ Overview

**Purpose**

The ‘Daily Transmit’ feature enables two-way communications between the Unit and Moose International for the purpose of transmitting and receiving updated data about the Fraternal Unit as a whole and the Unit’s individual members. Be aware of the following when performing a Daily Transmit:

- You must be connected to the Internet.
- Access the Daily Transmit option via the Go To menu.
- You must perform the Daily Transmit; Moose International cannot do this for you!
- An ‘Application Transmit’ must be performed before the ‘Daily Transmit’! A Warning prompt will appear to remind you of this transmission (see graphic at the top left).
- Perform a ‘Daily Transmit’ at the end of each day even though you might not have anything new to transmit! You may receive information from Moose International. You will be reminded about the “Daily Transmit” (see the Warning prompt at the top left).

**Access and Field Descriptions**

Refer to the example screen capture at the left as ‘Daily Transmit’ information fields are described below.

- **1. Send Date/Time** – drop-down field that lists date and time that the unit performed a Daily Transmit. When a date/time is selected, the completed transmit date/time will be identified.
- **2. Fraternal Unit** – area that lists any updates the Unit made about the Unit itself since the last Daily Transmit.
- **3. Member** – area that lists any updates that the Unit made about its individual members since the last Daily Transmit.
- **4. Fraternal Unit Rates** – area that lists any updates that the Unit entered about dues rate changes.
- **5. Connect to Moose International** – when clicked, this button initiates the data transfer between the Unit and Moose Int’l.
‘Daily Transmit’ Screen (cont)

‘Daily Transmit’ Initial Screen (cont):

Downloaded data from Moose International appears in the **Receive** tab.

**Additional Messages** from Moose International appear in the **Messages** tab.

Scroll to see this section!
More About the ‘Send’ Tab

5. Send - click the ‘Send’ tab to review recent updates that you made in LCL.net (if any) and are ready to send to Moose International. If you have NOT entered any Fraternal Unit, Member, and/or Fraternal Dues Rates updates in LCL.net since the last Daily Transmit, these data areas will be blank.

- View the updates in the following areas for accuracy before you transmit: Fraternal Unit, Member, and Fraternal Unit Rates (as shown in the graphic at the left).
- You may need to scroll up or down to view all three information areas.
- Your data updates will be sent after you click the ‘Connect to Moose International’ button.

More About the ‘Receive’ Tab

6. Receive – click the ‘Receive’ tab to view downloaded responses, from Moose International, about the updated Fraternal Unit, Member, and/or Fraternal Unit Rates data that you sent via your Daily Transmit.

- Follow-up on any of the data you received from Moose International if/where necessary.

More About the ‘Messages’ Tab

7. Messages – Click the ‘Messages’ tab to view additional messages about additional updates that Moose Int’l downloaded to your Unit (e.g., notifications about transmission issues or member updates such as address/email change, death of a member, or conflicting data between the Unit and Moose International).

- Follow-up on any of the messages you received from Moose International if/where necessary.
‘Daily Transmit’ Views

Warning that ‘Application Transmit’ needs to be performed!

Warning that ‘Daily Transmit’ needs to be performed!

‘Daily Transmit’ Screen – view data before you send:

View any Fraternal Unit data that displays here before you transmit.

View any Member data that displays here before you transmit.

View any Fraternal Unit Rates data that displays here before you transmit.
Perform a ‘Daily Transmit’

Refer to the example screen captures at the left as the Daily Transmit steps are described below.

➔ Open an Internet connection.
➔ From the LCL.net Go To menu, choose Daily Transmit.
   ➔ If warned about the ‘Application Transmit’, click ‘Yes’ to perform the Application Transmit now.
   ➔ When warned about the ‘Daily Transmit’, click ‘OK’ to return to the Daily Transmit screen.
➔ From the Send tab, View all Fraternal Unit, Member, and Fraternal Unit Rates data displayed for accuracy (if any).
➔ Click the Connect to Moose International button.
   ➔ Your Unit/Membership updates will transmit to Moose International.
   ➔ Transmission progress steps will be displayed up until the transmission is completed. At this time, the LCL.net view will automatically switch to the ‘Receive’ tab. Returned data from Moose International will download into the Receive tab (as shown in graphic at the left).
➔ Click the Receive tab to view any downloaded data from Moose International (if any).
➔ Click the ‘Messages’ tab to view any downloaded messages from Moose International.
➔ Click the Close button.

*NOTE: You may need to wait another 24 hours (when you perform the next Daily Transmit) to see any returned messages from Moose International. Check the ‘Received’ and ‘Messages’ tabs regularly!
Transmission Error Message Example

Example LCL.net Error Message:

![LCL.net Error](image-url)
Troubleshooting Transmission Error Message

You may, on occasion, receive an LCL.net-generated error message (similar to the one shown at the left) when you attempt to transmit data to Moose International. If you are unable to resolve the error on your own, follow the steps below before you contact Moose International Member Services for assistance.

Before You Ask for Assistance

- Do not close the error message!
- Click the ‘PrintScrn’ button on your keyboard to capture the error message.
- Open a new Microsoft Word document or email.
- Right-click your mouse and click Paste. The captured error message should appear in your new document or email. Resize the graphic if necessary.

To Contact Technical Support Staff at Moose International

- Send the email, with the pasted error code (or attached word document that contains the error code) to the following address:
  helpdesk@mooseintl.org

- Provide as much information as you can about what you were doing prior to receiving the error code. This detail, in conjunction with the error code example, will help reduce the amount of time it will take Moose International staff to help resolve your issue.

- Be sure to provide your contact information and the best time to reach you. Please also be sure that you are available at the time you indicated. This will help Help Desk staff address your issue in a timely fashion.
‘Get Awards and Degrees’ Screens

Access to the ‘Get Awards and Degrees’ option:

Retrieve Award and Degree Information from the Moose International Server

Award and Degree information has been updated Successfully.
Other Updates from Moose Int’l – ‘Get Awards and Degrees’

In addition to the ‘Application Transmit’ and the ‘Daily Transmit’, Units can receive updated/downloaded data from Moose International about:

- A member’s awards and degrees (as recorded by Moose International); and
- A member’s updated personal data

**Get Awards and Degrees (Updates)**

The ‘Get Awards and Degrees’ option is only performed periodically due to the theory behind the process. Since awards and degrees take time to achieve, LCL.net updates are not required that often. Refer to the example screen captures at the left as the procedure for updating your members’ awards and degrees data is described below.

➔ Open an Internet connection.

➔ From the LCL.net Go To menu, choose Get Awards and Degrees.

➔ From the Get Awards and Degrees screen, click the Get Awards and Degrees button (as shown in the middle graphic at the left).

➔ LCL.net retrieves current award and degree data for all of the Unit’s members and populates the Member Screen(s) with the dates that are on file at Moose International.

➔ When prompted that the information was updated successfully (as shown in the graphic at the lower left), click OK.

➔ Click the Close button. Affected member records will reflect the current award and degree updates from Moose International.
‘Get Member Information’ Screens

Access to the ‘Get Member Information’ option:

[Image of the LCL.net Training Edition v2.1 Workspace showing the 'Get Member Information' option]

[Image of the 'Get Member Information' screen showing a warning message]

[Image of the 'Get Member Information' screen showing a successful retrieval message]

Enter MID# to replace your data for this MID#.

Click to confirm
Other Updates from Moose Int’l – ‘Get Member Information’

Get Member Information

The ‘Get Member Information’ option enables Units to access the Moose International server for purposes of downloading current information about a member within the Unit. Be aware that if you perform this option, your LCL member data will be replaced with Moose International’s data.

NOTE: You may want to use the Get Member Information feature if you’ve experienced any recent transmission/synchronization issues with Moose International during the transmission processes. This menu option ensures that your members’ dues expiration dates match those recorded in Moose International’s records.

Refer to the example screen captures at the left as the procedure for updating your members’ information through ‘get member information’ is described below.

➤ Open an Internet connection.
➤ From the LCL.net Go To menu, choose Get Member Information.
➤ From the Get Member Information screen, enter the member’s Moose Identification # (as shown in the middle graphic at the left).
➤ Click the Get Member’s Information button.
    ➤ An LCL.net warning will appear alerting you that your Unit’s data record for this member will be replaced with the data that Moose International has in its database.
➤ Click ‘Yes’ at the LCL.net Warning (as shown at the left) to accept the member updates from Moose International.
    ➤ The appropriate member records will reflect the new member information.
➤ Click OK after the LCL.net Message appears to acknowledge successful retrieval of the information (as shown at the lower left).
➤ Click the Close button in the Get Member Information screen.
➤ Verify the member data via the LCL.net Members tab if desired.
Lesson 6 – Self Check

40. Units must initiate an ‘Application Transmit’ before initiating a ‘Daily Transmit’ (see page 6-5).
   N. True
   O. False

41. Moose International cannot initiate an ‘Application Transmit’ or ‘Daily Transmit’ (see page 6-5).
   T. True
   U. False

42. Applications listed in the ‘Active’ tab indicate that the Unit needs to take further action on these applications (see page 6-7).
   O. True
   P. False

43. Which of the following can you view BEFORE you perform an ‘Application Transmit’ (see page 6-7)?
   O. Active Applications (entered in LCL.net)
   P. Transmitted Applications (by the Unit)
   Q. Received Applications (from Moose International)
   R. All of the above

44. If you do not have any updated application or membership data to report on a given day, you do NOT need to perform an Application Transmit & Daily Transmit that day (see page 6-13).
   L. True
   M. False

45. Do you need an Internet Connection to perform a Daily Transmit (see page 6-13)?
   A. Yes
   B. No

46. LCL.net automatically keeps track of the Unit’s transmission dates and times (see page 6-13)?
   A. True
   B. False

47. If you receive an LCL.net error that you cannot resolve on your own, be sure to ____ and then contact the Moose International Help Desk for assistance (see page 6-19).
   A. Copy the error code
   B. Contact your Regional Manager
   C. Log off of LCL.net

48. An Internet connection is required to ‘Get Member Information’ from Moose International (see page 6-23).
   A. True
   B. False

Proceed to Lesson 7 – Monthly Reports
Lesson 7 – Monthly Reports

About this Lesson

This lesson will demonstrate how to create and transmit the monthly financial reports (or the monthly Balance Sheet and Profit and Loss Statement) due to Moose International. Though these reports are created, updated, and transmitted via LCL.net, data is retrieved from QuickBooks.

Objectives

After completing this lesson, you will be able to:

- Configure your QuickBooks Company Preferences to enable communications with LCL.net
- Create and update monthly financial reports in LCL.net
- Successfully transmit monthly financial reports to Moose International

Topics

The following topics are included in this lesson:

- Monthly Reports Overview
- Monthly Reports Field Descriptions
- More About Report Status Views & Icons
- QuickBooks/LCL.net Configuration Settings
- Creating Monthly Reports
- Updating Monthly Reports
- Transmitting Monthly Reports
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‘Monthly Reports’ Access Overview

Commonly Used Monthly Report Buttons:

- **Create**
  Allows a Monthly Report (e.g., Balance Sheet or Profit & Loss Statement) to be created.

- **Create All**
  Checking this box allows multiple Balance Sheets and/or P&L Statements to be created (if reports from the previous month(s) were not yet created or transmitted).

- **Update**
  Only appears after a monthly report was created. Updates financial data on a Balance Sheet or P&L Statement that was created by the Unit but not yet transmitted. Updated data is as current as the day the update was performed.

- **Transmit**
  Connects you to Moose International (requires an Internet connection)
  Checking this box allows multiple financial reports to be transmitted to Moose International.

- **Close**
  Exits you out of the report view.
‘Monthly Report’ Overview

**Purpose**

The LCL.net Monthly Reports option allows you to create, update, print, and transmit monthly financial reports that detail your Unit’s net accounting activity for a given month. This accounting information is retrieved from your QuickBooks Company Accounts.

Monthly financial reports, or your Unit’s monthly Balance Sheet and Profit & Loss Statement, must be submitted to Moose International by the 10th of every month. In other words, end-of-month financial reports need to be transmitted to Moose International by the 10th day that follows the previous month end.

Please be aware of the following as you work with the Monthly Reports feature:

- LCL.net and QuickBooks work together to compile financial report data. Though the reports are created and transmitted via LCL.net, QuickBooks must be opened/minimized to enable the reports to be created.
- If creating/transmitting monthly reports for the first time in LCL.net, you must enter data on a QuickBooks Application Certificate screen to allow the reports to be created and transmitted. This configuration setup is described later in this manual and should be completed before you attempt to create monthly reports.
- An Internet Connection is required to transmit monthly reports to Moose International!

**Commonly-Used Buttons**

Some of the more-commonly used buttons that you will use when working with the LCL.net Monthly Reports feature are shown and described, at the left.
‘Monthly Reports’ Screen Overview

Initial ‘Monthly Reports’ screen – with a ‘Ready to Create’ Report selected:

1. Drop-down list shows reports by: report #, report-day-year and, and report status.
2. Report Display Area.
3. Report action button changes to Update.
4. Monthly report status changes after a report action is performed.

Example Monthly Reports Screen – AFTER Report(s) Were Created:
‘Monthly Reports’ Screen Overview

Monthly Reports Field Descriptions

Refer to the graphics at the left as the initial Monthly Reports screen is overviewed below.

- **Header Area** – this section lists monthly reports that need to be created, updated, and/or transmitted to Moose International. Monthly reports are listed by report#, month-day-year, and report status (e.g., ‘Ready to Create’ or ‘Ready for Update or Transmit’) as shown in the graphics at the left.

  - Choosing a report from the Month drop-down options allows you to perform the “Ready to…” action for that report. If you choose a report with a status of ‘Ready to Create,’ the ‘Create’ button will automatically appear in the header area. If you choose a report with a status of ‘Ready to Update or Transmit,’ the Update and Transmit buttons will appear.

  - If the Month drop-down options list multiple reports that need to be created, you can create all ‘Ready to Create’ reports at once by simply clicking in the ‘Create All’ box in the header area. Be aware that Creating All reports at once could take some time!

  - After the financial reports have been created, the Create button changes to Update. You may need to update report data, prior to transmitting the report to Moose International, to ensure that the end of month figures are accurate at the time of transmit.

- **Balance Sheet tab** – Clicking this tab allows you to view your monthly Balance Sheet figures (similar to the one shown at the lower left). Use the scroll bar at the right to view more data.

- **Profit and Loss tab** – Clicking this tab allows you to view the Profit and Loss Statement for the month you selected.

- **Report Menu Bar** – icons, that when clicked, allow you to export, print, or refresh a report view and/or zoom in on specific data.

- **Report status text** – system-generated text that identifies the number of monthly reports that are ready to be created and/or ready to be updated or transmitted to Moose International.
# Monthly Reports Status Button Comparison Table

**Action/Status Buttons:**

<table>
<thead>
<tr>
<th>This button…</th>
<th>Is accessible when…</th>
<th>And does this…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create</td>
<td>“Ready to Create’ month is selected</td>
<td>Retrieves data from QuickBooks; records it in LCL.net.</td>
</tr>
<tr>
<td>Update</td>
<td>“Ready to Update or Transmit’ month is selected</td>
<td>Updates any net balance activity from QuickBooks; records updated data in LCL.net.</td>
</tr>
<tr>
<td>Transmit</td>
<td>“Ready to Update or Transmit’ month is selected</td>
<td>Closes the current month by retrieving the month’s net balance activity from QuickBooks; records the data in LCL.net (including transmission date and time); transmits the data to Moose International.</td>
</tr>
<tr>
<td>Create All</td>
<td>1 or more monthly reports are due</td>
<td>Creates all monthly reports that have not been created in LCL.net yet.</td>
</tr>
<tr>
<td>Transmit All</td>
<td>1 or more created/updated reports are ready to send to Moose Int’l</td>
<td>Transmits all monthly reports that have not been sent to Moose International yet.</td>
</tr>
<tr>
<td>Close</td>
<td>Viewing any of the Monthly Reports screens</td>
<td>Exits you out of the Monthly Reports</td>
</tr>
</tbody>
</table>

**Monthly Report Icons:**

- Export
- Print
- Refresh
- Toggle (between reports)
- 1st Page
- Previous Page
- Last Page
- Next Page
- Go To Page
- Find/Search
- Close Current View
- Zoom
More About Report Status Views & Icons

**Monthly Report Action/Status Buttons**

Refer to the table at the top left to compare and contrast the function of the *action/status buttons* that you’ll see when working within the LCL.net Monthly Reports screens.

---

**Monthly Report Icons**

Refer to the graphic at the bottom left to view the function of the *icons* that you’ll see when working within the LCL.net Monthly Reports screens.
QuickBooks / LCL.net Configuration Screens

Example LCL.net/QuickBooks Access Error Code:

Access to the QuickBooks Integrated Applications Settings:

QuickBooks Company Preferences Tab

‘Allow Access’ Area (click to uncheck)
QuickBooks / LCL.net Configuration Settings

Since LCL.net and QuickBooks work together to compile monthly financial reports, you must configure your QuickBooks Company Preferences to enable LCL.net to access your QuickBooks data. This simple ‘Integrated Applications’ configuration only needs to be performed once.

If you are creating Monthly Reports in LCL.net for the first time – and have not configured the QuickBooks ‘Integrated Applications’ properly – you will receive an LCL.net error message similar to the one shown at the top left. The message is letting you know that LCL.net is unable to pull data from the QuickBooks Company file because QuickBooks does not recognize the LCL.net application.

Configure the QuickBooks ‘Integrated Applications’ Preference

Refer to the access graphics at the left as the steps for configuring the QuickBooks Integrated Applications preference is identified below:

→ From QuickBooks Edit menu, select Preferences as shown in the graphic at the left.

→ From the Preferences menu, click the ‘Company Preferences’ tab and then select the ‘Integrated Applications’ option from Preferences list (left side of the screen).

→ In the ‘Allow Access’ area of the QuickBooks Company Preferences screen, click to uncheck the LclWin application name. Un-checking the application at this point simply means that you do not have a registered ‘digital certificate’ for this application that is recognized by QuickBooks. A second QuickBooks window will appear, ‘Application with No Certificate,’ prompting you for additional settings (see next page).
'Application with No Certificate' Window

Application with No Certificate window

Access Confirmation window

Confirm to Proceed window
QuickBooks / LCL.net Configuration Settings (cont)

Configure the ‘QuickBooks – Application with No Certificate’ settings

→ After the ‘QuickBooks – Application with no Certificate’ screen appears (as shown at the top left), click the following:

→ ‘Yes, always; allow access even if QuickBooks is not running.’
→ ‘Allow this application to access personal data…’
→ Click the Continue button.

→ After the ‘Confirm to Proceed’ screen appears (as shown in the graphic at the lower left), click ‘Yes’ to accept the digital certificate disclaimer information – or to enable LCL.net to access the QuickBooks company file.

→ When the ‘Access Confirmation’ window appears, click the Done button to complete QuickBooks/LCL.net application integration configuration.

From this point on, LCL.net and QuickBooks should communicate successfully when you attempt to create/transmit your monthly reports in LCL.net.

Troubleshooting Tip: If your LCL.net-generated financial reports transmitted with all $0.00 balances on the report, but your QuickBooks reports show actual dollar amounts for your accounts, follow this procedure to correct the data transmission problem!
‘Create’ Monthly Reports Screens

Access the Monthly Reports (LCL.net / Go To / Monthly Reports):

Initial Reports View:

- Functional Create button and Create All checkbox
- Report Status: 1 month ready to be created; 10 months ready for update or transmit

View after report was created:
'Create' Monthly Reports

Refer to the graphics at the left as the procedure for Creating Monthly Reports is described below.

→ From the LCL.net **Go To** menu, choose **Monthly Reports**. A screen similar to the one at the top left will appear. Note the monthly report status text at the bottom of screen (shown in red if viewing this manual electronically). In our example at the left, we can see that (1) monthly report is ready to be created and (10) reports are ready for update or transmit. These (11) reports will also appear in the Month drop-down list.

→ From the **Month drop-down** options, choose the report that needs to be created (e.g., February 29, 2012 as shown in the example at the left).

→ Click the **Create** button. The Monthly Reports for the month will be created – by retrieving net balance activity for that month from QuickBooks – and recording the information into the LCL.net database. The Balance Sheet data will appear in the report display area similar to the graphic shown at the lower left.

### REMEMBER – if you had multiple monthly reports that were Ready to Create, you could click the 'Create All' box in the header area to create all of these reports at once. ALSO REMEMBER that report data will not be transmitted to Moose International until you click the Transmit button.

→ Use the arrows to **view all Balance Sheet data** for this month (e.g., your assets, liabilities, equity and net income).

→ Click the **Profit and Loss tab** to view this month’s: total income, total cost of goods sold, gross profit, total expenses and net income.

→ Click the **Refresh, Print, or Export** icons as desired for record keeping purposes.

→ Close the **Close** button to exit out of the reports.
‘Update’ Monthly Reports Screens

Access the Monthly Reports (LCL.net / Go To / Monthly Reports):

Ready for Update or Transmit:

View after report was updated:
'Update' Monthly Reports

After you’ve created your Monthly Reports in LCL.net, it is possible to update the report data before you transmit it to Moose International. If, for example, you created your monthly reports on the 2nd of the month, your Auditing Committee performed their audit a few days later, and you made updates to the books as an outcome of that audit, you would want to ‘update’ your monthly reports prior to transmitting to Moose International by the 10th of the month deadline.

Refer to the graphics at the left as the procedure for Updating Monthly Reports is described below.

→ Open your QuickBooks Company file and verify that all end-of-month entries have been recorded. If they have not, enter any outstanding receipts, deposits, bills, bill payments, etc to ensure that the monthly report data will be accurate. If all entries are current, minimize QuickBooks.

→ From the LCL.net Go To menu, choose Monthly Reports.

→ From the Month drop-down options, choose a report with a ‘Ready to Update or Transmit’ status.

→ Click the Update button to update the LCL.net Balance Sheet and Profit and Loss reports with the most current accounting information from your QuickBooks accounts.

→ If the Balance Sheet is not already displayed, click the Balance Sheet tab to view updates to your asset, liability, equity, or net income figures. Use the arrows to view all report data.

→ Click the Profit and Loss tab to view any updates to your total income, total cost of goods sold, gross profit, total expenses and net income. Use the arrows to view all report data.

→ Click the Refresh, Print, or Export icons as desired for record keeping purposes.

→ Click the Close button to exit out of the reports.

REMEMBER – updated report data will not be sent to Moose International until you click the Transmit button.
‘Transmit’ Monthly Reports Screens

Access the Monthly Reports (LCL.net / Go To / Monthly Reports):

Ready for Transmit:

Example Transmit Warning Prompt When ‘Transmit All’ is selected:
‘Transmit’ Monthly Reports

After your monthly reports have been created/updated, they are ready to be transmitted to Moose International.

- Remember – you MUST transmit monthly reports by the 10th of every month.

- When the Unit initiates the Transmit, the data is automatically transmitted to Moose International.

- Transmitted reports cannot be updated! Therefore, it is highly recommended that the monthly audit be completed, prior to the transmit, to ensure that all financial corrections are reflected in the transmitted reports.

Refer to the graphics at the left as the procedure for Transmitting Monthly Reports is described below.

→ Open, and minimize, your **QuickBooks Company**.

→ From the LCL.net *Go To* menu, choose **Monthly Reports**.

→ From the Month drop-down options, choose a report with a ‘**Ready to Update or Transmit**’ status.

**NOTE:** If multiple reports are listed in the drop-down list, you MUST choose the oldest report first.

→ Click the **Transmit** button (or check the Transmit All box) to send your monthly reports to Moose International.

**NOTE:** Clicking the ‘Transmit All’ checkbox will allow you to transmit multiple monthly reports that have not yet been transmitted. If you click ‘Transmit All’ you will receive a prompt (similar to the one shown at the lower left) reminding you about transmission time and then asking for your confirmation to continue with the transmit.
‘Transmit’ Monthly Reports Screens (cont)

Successful Transmission Notification (from LCL.net):

Example Screen View – After a Successful Transmit:
'Transmit' Monthly Reports (cont)

→ An Information window, similar to the one shown in the top left graphic, will appear after all reports have successfully transmitted to Moose International. Click **OK** to acknowledge the message.

- Referring to the graphic at the lower left, notice that all reports listed in the Month drop-down window all show a report status of Transmitted.

- On the first day of the following month, the dropdown will display the previous month with a Status of READY TO CREATE.

→ Click the **Close** button to exit the LCL.net Monthly Reports feature.
Lesson 7 – Self Check

49. Monthly financial reports must be transmitted to Moose International by the __ of every month (see page 7-5).
   P. 1st
   Q. 10th
   R. 15th

50. QuickBooks must be opened/minimized the first time you create monthly financial reports in LCL.net (see page 7-5).
   V. True
   W. False

51. Which of the following reports does not have to be created every month by the Unit (see page 7-5)?
   Q. Unit’s Balance Sheet
   R. Unit’s Profit and Loss Statement
   S. Unit’s Budget Plan

52. If a Unit was unable to submit a given month’s financial reports by the deadline, that report can be submitted at a later date (see page 7-8).
   S. True
   T. False

53. A monthly report having a “Ready to Transmit” status has been created but not yet transmitted to Moose International (see page 7-19).
   N. True
   O. False

54. The system will notify you when your monthly reports have transmitted successfully (see page 7-20).
   A. True
   B. False

55. If your financial reports transmitted with all $0.00 balances, but your QuickBooks reports show actual dollar amounts, you might need to check your _____ (see page 7-13).
   A. Bank Statement
   B. Internet Connection
   C. QuickBooks Integrated Applications setting

---

Proceed to Lesson 8 – Membership Reports & Data Backups
Lesson 8 – Membership Reports & Data Backup

About this Lesson

This lesson will demonstrate how to access and create standard, and customized, reports about your Unit’s membership.

When selected, the LCL.net ‘Reports and Labels’ feature allows you to create (12) different types of membership reports. This feature also allows you to create mailing labels for most of the report types.

When selected, the LCL.net ‘Export’ feature allows you to customize your own reports by picking and choosing your preferred data fields. This lesson also provides the procedures for backing up and restoring your Unit’s membership data.

Objectives

After completing this lesson, you will be able to:

- Create default membership reports and labels in LCL.net
- Export LCL.net data to customize your own reports
- Backup and restore your LCL.net data

Topics

The following topics are included in this lesson:

- Reports & Labels Overview
- Standard Membership Reports
- Standard Labels
- Customized Membership Reports
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Default Reports and Labels Screens

Default LCL.net ‘Reports and Labels’ Options:

![Diagram of LCL.net Report Screen]

Commonly-Used Reports and Labels Buttons:

- **Create Report**
  - When clicked, will generate the report (if data exists).

- **Close**
  - Closes the report window
Default Reports and Labels

The LCL.net ‘Reports and Labels’ feature enables you to quickly create LCL.net-generated reports about your Unit’s membership statistics at any given point in time. There are twelve default reports as shown in the graphic at the left.

Access the Default Membership Reports

Follow the steps below to view the different types of membership reports and/or labels available to you.

→ Click the Go To menu, drag your mouse down to the ‘Reports and Labels’ option, and then drag your mouse to the right of the arrow to view report types.

→ Drag your mouse down to choose the desired report.

After you’ve selected a particular report, you will be presented with an option to create a report or, in some cases, create mailing labels associated with the report type.

• ALL default reports contain a ‘Create Report’ Button that enables you to create the report.

• ALL default reports contain a ‘Close’ button that exits you out of the report view (either before or after the report was created).

• All of the default reports contain an option to create mailing labels EXCEPT for the following:
  • Deposit Report
  • Member Payments Report
  • Miscellaneous Code Report
  • Deceased Report
  • Paid as of Date
Reports vs. Labels Setup Criteria

‘Applicant’ Report Options vs. ‘Applicant’ Label Options:

Note: New reports or labels can be created at any time by first selecting different reporting options and then clicking the Create Report button.
Setting up Reports vs. Labels

**Similarities Between Reports and Labels**

The graphic at the left illustrates typical options available to you after you've selected a report type from the Go To menu (e.g., 'Applicant' report, in our example).

- The left-most part of the graphic at the left shows the setup options for an **applicant report**.
- The center part of the graphic shows the setup options for **applicant report labels**.
- The right-most part of the graphic shows a partial report display area.

26. **Reports or Labels** – let’s you choose between creating Reports OR creating Labels.

27. **Selection Options** – let’s you select the specific data that you would like to show on your Reports OR your Labels by choosing fields from selection drop-down boxes or radio buttons.

28. **Sort Options** – let’s you define how you want the data for your Reports OR Labels to be sorted/listed on the report.

29. **Label Selection** – only appears when Labels is chosen in #1 above. Let’s you choose from one of three different types of Avery Labels – two recommended for mailing and one recommended for badges. The Zip Code Report selection lists all zip codes associated with your Unit’s membership and the number of labels for each zip code. This is useful if/when the post office’s required bulk mailing form needs to be created.

30. **Create Report Button** – when clicked, creates your reports or labels.

31. **Report Display Area & Toolbar** – area that displays the reports or labels that you created. You can print from this view if desired. Though the display area is not shown in the Reports example at the left, this area does appear whenever you choose a Reports and Labels option. The toolbar icons are grayed out in the example at the left because the report has not yet been created. They will become functional after you create your Report or Labels.
Reports and Labels Toolbar

- Export
- Print
- Refresh
- Toggle Group Tree
- Close
- Find
- Zoom

Go to Page Arrows:
- First Page
- Previous Page
- Next Page
- Last Page
- Go To Page

Example FIND action:

06/04/2012 - 2:29:32PM

LOYAL ORDER OF MOOSE
MOOSE LODGE JEFFERSON NO. 9999
ARREARS REPORT
All Members as of 06/30/2012

Member Information

<table>
<thead>
<tr>
<th>Name</th>
<th>Home Phone</th>
<th>Dues Expire</th>
<th>Sponsor</th>
<th>Sponsor Phone</th>
<th>Status</th>
<th>Enroll Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ken Perkins</td>
<td></td>
<td>03/01/2011</td>
<td>Riley Parkoff</td>
<td></td>
<td>Dropped</td>
<td>01/27/1998</td>
</tr>
<tr>
<td>JEFFERSON IL 45679-3932</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kyle Raymond</td>
<td>04/30/2012</td>
<td></td>
<td>Joe Toon</td>
<td></td>
<td>Expired</td>
<td>02/16/1984</td>
</tr>
<tr>
<td>JEFFERSON IL 4567</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ralph Weir</td>
<td>04/08/2012</td>
<td></td>
<td></td>
<td></td>
<td>Dropped</td>
<td>02/16/1962</td>
</tr>
<tr>
<td>JEFFERSON IL 4567</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seth Weislev</td>
<td>04/08/2012</td>
<td></td>
<td></td>
<td></td>
<td>Expired</td>
<td>10/01/1962</td>
</tr>
</tbody>
</table>
Reports and Labels Toolbar

Referring to the graphic at the left, the Report and Labels toolbar (located at the top of the viewing area), allows you to perform different functions within the view.

Action Icons

Action icons appear in the toolbar at the left and right side of the toolbar. The action icons are defined as follows:

- Export – Opens the Export Report window, allowing you to export the report in a desired, customized format.
- Print – Opens the Print window, allowing you to print the report.
- Refresh – Updates or refreshes the data shown in the report being viewed.
- Toggle Group Tree – Toggles the report display to show the group tree on the left side of the viewing area.
- Close Current View – Closes the report being viewed.
- Find – Brings up a text box that allows you to enter a piece of data that you’d like to search for (e.g., name).
- Zoom – Drop down menu allows you to choose a zoom factor for viewing the report.

Go To Page Icons

The toolbar page control icons you to quickly move to a desired report page (see middle area in the graphic at the top left).

- Go to First Page – Displays the first page of the report. Active when you are not on the first page.
- Go to Previous Page – Displays the previous page in the report. Active when you are not on the first page.
- Go to Next Page – Displays the next page of the report. Active when you are not on the last page.
- Go to Last Page – Displays the last page of the report. Active when you are not on the last page.
- Go to Page – Allows you to enter the page number in the report that you’d like to go.
‘Address Change’ Reports and Labels Views

Report Setup Options:

Drop down to choose date; or Type in a date (MM/DD/YYYY)

Drop down to choose date; or Type in a date (MM/DD/YYYY)

Click & wait for report to generate (see example below)

Example ‘Address Change’ Report – sorted by name:

<table>
<thead>
<tr>
<th>Name and Address</th>
<th>Active Address</th>
<th>Bad Address</th>
<th>Change Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sammy Johnson</td>
<td>Y</td>
<td>N</td>
<td>02/14/2012</td>
</tr>
<tr>
<td>1313 MOOXINCEBIRD LANE TUCSON AZ 85747</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mark Williams</td>
<td>Y</td>
<td>N</td>
<td>02/07/2012</td>
</tr>
<tr>
<td>1111 RIVER ROAD JEFFERSON IL 60559</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
‘Address Change’ Reports and Labels

This report is used to identify any membership address changes that were made during a specified period of time – either on the website, at Moose International, or at the fraternal unit.

Create ‘Address Change’ Reports

→ Click the Go To menu, scroll down to Reports and Labels, and then scroll to right to select Address Change.

→ After the report setup options appear, click the Reports button.

→ In the Selection area, enter a starting date for any address changes made in your unit since that date. Or, drop down to choose a date from a calendar.

→ In the Sort area, click the button that identifies how you want your report data to be sorted (e.g., by the address change date, the individual’s ID, or by the individual’s name)

→ Note that the Label Selection area is grayed out. This is because you are creating a report and not labels at this time.

→ Click the Create Report button. Print the report if desired.

Create/Print ‘Address Change’ Labels

→ Still within the Address Change Report, click the Labels button from the setup options (see top graphic at the left),

→ Leave the Change Since Date the same as you chose when you created the report.

→ Sort by Name.

→ Choose the preferred Label Selection this time. NOTE: These options will appear as soon as the Labels button is clicked.

→ Click the Create Report button

→ Create /Print labels for this report if desired by clicking the Labels button and then choosing print options as they appear.
‘Activities’ Reports and Labels Views

Report Setup Options:

- **Activity Reports/Labels**
  - **Reports**
  - **Labels**
  - **Activity**
  - **Activity Totals**

**Selection**
- **Category**
  - **CARDS**
- **Activity**
  - **500 RUMMY**
- **Relationship**
  - **Member**
  - **Spouse**
  - **Child**
- **Age Range**
- **Gender**
  - **Male**
  - **Female**

- **Create Report**

Drop down to choose the report’s activity category (e.g., cards, committees, sports, community, etc.)

Drop down to choose a specific activity for your report

Click & wait for report to generate (see example below)

Example ‘Activities’ Report:
‘Activities’ Reports and Labels

This report is used to identify all of your Unit’s activities and the total number of members involved in those activities. This information is pulled from the data that you entered for each of your members’ family interests – if you entered it!

Create ‘Activities’ Reports

→ Click the Go To menu, scroll down to Reports and Labels, and then scroll to right to select ‘Activities.’

→ After the report setup options appear, click the Reports button.

→ Click the Activity button to run a report on members interested in this specific activity; OR click the Activity Totals button to run a report on members interested in all Unit activities.

**NOTE:** If you choose ‘Activity Totals’ you will not need to select any additional report parameters. You will be prompted to Create Report after clicking on Activity Totals.

→ In the Selection area:

  → Drop down to choose the Category for the activities associated with your reporting needs.

  → Drop down to choose the specific Activity associated with your reporting needs

  → Click the Relationship (e.g., member, spouse, and/or child) and Gender boxes as needed per your reporting needs (if at all).

  → Enter the Age Range for any Relationship box checked as needed per your reporting needs (if at all).

→ Click the Create Report button. Print the report if desired.

→ Create/Print Labels for this report if desired by clicking on the Labels button and choosing print options when they appear; OR, or Close the report.
‘Applicant’ Reports and Labels Views

Report Setup Options:

**Application Code Options**

```
Application Code
All - Excluding Comp
1 - New
1 - Multiple Membership
2 - Re-Enroll
3 - Reinstated
5 - Transfer In
L - Comp Member
```

**Application Status Options**

```
Application Status
All
Active
Transmitted
Accepted
Rejected
Inactive
Exception
Enrolled
Previously Accepted
```

This is the current date!

Click & wait for report to generate (see example below)

**NOTE:** Application Code, Application Status, and Sponsor ID Sort options only appear when the ‘Applicant’ option is checked at the top of the report setup options.
‘Applicant’ Reports and Labels

This report allows you to produce detailed reports about your Units’ Applicants at any given point in time. If desired, a more condensed report can be created in a roster format to list basic information about your Applicants. Applicant labels can also be created from this option.

Create ‘Applicant’ Reports

→ Click the Go To menu, scroll down to Reports and Labels, and then scroll to right to select Applicant.

→ After the report setup options appear, click the Reports button.

→ Click the Applicant button to create a detailed report about Applicant type and status; OR, click the Applicant Roster button to create an abbreviated list of all Applicants.

→ In the Selection area:

  → Leave the Application Code at the default (All – Excluding Comp) or drop down to choose the Application Code that meets your reporting needs. Refer to the graphic at the left to view all Application Code options.

  → Leave the Application Status at the default (All) or drop down to choose the Application Status that meets your reporting needs. Refer to the graphic at the left to view all Application Status options.

  → If desired, identify when you want Applicant data to be pulled from the system by choosing the App Received Start date and/or the App Received End date. The end date defaults to the current date.

  → Choose your preferred Sort option for your report by clicking the radio button that meets your reporting needs (e.g., sort by application number, name, code, status, Sponsor ID or App Received date).

→ Click the Create Report button. Print the report if desired.

→ Create/Print Labels for this report if desired by clicking on the Labels button and choosing print options when they appear; OR, or Close the report.
‘Applicant’ Reports and Labels Views (cont)

Partial Applicant Report – ALL Codes and Status, Sorted by Name:

<table>
<thead>
<tr>
<th>Applicant Information</th>
<th>Sponsor Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Johnson, Sammy</td>
<td>Cowan, Donnie</td>
</tr>
<tr>
<td>Home Phone: 051000018</td>
<td>Home Phone:</td>
</tr>
<tr>
<td>Dues Owed: 0.00</td>
<td>Status: Enrolled</td>
</tr>
<tr>
<td>Fee Owed: 0.00</td>
<td>App Code: 1 - New</td>
</tr>
<tr>
<td>0510000017</td>
<td>Application Received: 02/03/2012</td>
</tr>
<tr>
<td>John, BillyBob</td>
<td>Aven, Nol</td>
</tr>
<tr>
<td>Home Phone: 051000017</td>
<td>Home Phone:</td>
</tr>
<tr>
<td>Dues Owed: 0.00</td>
<td>Status: Enrolled</td>
</tr>
<tr>
<td>Fee Owed: 0.00</td>
<td>App Code: 1 - New</td>
</tr>
<tr>
<td>051000016</td>
<td>Application Received: 12/14/2010</td>
</tr>
</tbody>
</table>

Example Applicant Roster Report:

<table>
<thead>
<tr>
<th>Application Number</th>
<th>Name</th>
<th>Received Date</th>
<th>Home Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>0510000010</td>
<td>Johnson, Sammy</td>
<td>02/09/2012</td>
<td></td>
</tr>
<tr>
<td>0510000017</td>
<td>Jones, BillyBob</td>
<td>12/14/2010</td>
<td>(630) 454-5214</td>
</tr>
<tr>
<td>0510000013</td>
<td>Kott, Randy</td>
<td>09/08/2006</td>
<td>(630) 454-5214</td>
</tr>
<tr>
<td>0510000016</td>
<td>Ness, William M</td>
<td>08/13/2006</td>
<td></td>
</tr>
<tr>
<td>0510000019</td>
<td>Smith, Harry</td>
<td>02/06/2012</td>
<td>(630) 857-9393</td>
</tr>
<tr>
<td>0510000021</td>
<td>Sparks, Jason</td>
<td>02/09/2012</td>
<td>(630) 857-9393</td>
</tr>
<tr>
<td>0510000022</td>
<td>Simones, Ralph</td>
<td>03/10/2012</td>
<td></td>
</tr>
<tr>
<td>0510000020</td>
<td>Williams, Hank</td>
<td>03/07/2012</td>
<td></td>
</tr>
</tbody>
</table>

Total Applicants Reported: 8
‘Applicant’ Reports and Labels (cont)

Example ‘Applicant’ Report

The partial Applicant Report shown at the top left illustrates what an Applicant Report might look like if set up to compile data for ALL Application Codes and ALL Application Status. This report was also set up to sort by Name.

- **Report Header Area (top)** – identifies the date and time of the report, the Unit Name/Number, report Title, and number of pages in the report.
- **Applicant Information Columns** – sorted alphabetically by last name. Notice that the Application # appears above the member’s name. Home phone, dues and fees owed, and status is included in this area of the report.
- **Sponsor Information** – the Applicant’s Sponsor information (e.g., MID#, Name, Phone and Application Received date data is also shown on this report.

Example ‘Applicant Roster’ Report

The Applicant Roster Report shown at the bottom left illustrates what the report might look like if set up to compile data for ALL Application Codes and ALL Application Status. This report was also set up to sort by Name.

- **Application Number** – appears at the left by default.
- **Name** – sorted alphabetically by last name.
- **Received Date** – identifies the date the application was received by the Unit
- **Home Phone** – identifies the Applicant’s home phone
- **Total Applicants Reported** – identifies the total number of Applications entered/transmitted in LCL.net for the date range that was specified when the report was set up.

**NOTE:** The Applicant Roster Report does not include the detail that the Applicant Report does – which includes the Sponsor Information.
‘Arrears’ Reports and Labels Views

Report Setup Options:

- **Reports**
  - All Members
  - By Month

- **Labels**

**Selection**

- Month: June 2012

**Status**

- All
- Expiring Only
- Expired Only
- Dropped Only

**Sort**

- Member ID
- Name
- Dues Expiration Date
- Enroll Date

Create Report

- All Members in Arrears
- Members in Arrears for a given month
- Defaults to current date
- Members expiring within a designated time period
- Inactive Members with an Expired Status
- Inactive Members with a Dropped Status

Example Partial Arrears Report:

```
06/05/2012 - 3:44:14PM
LOYAL ORDER OF MOOSE
MOOSE LODGE JEFFERSON NO. 9999
ARREARS REPORT
All Members as of 06/30/2012

Member Information
008284761
Ken Perkins
345 FOURTH AVE
JEFFERSON IN 45678-0832

002156492
Rae Raymond
34 MONROE
JEFFERSON IN

Dues Expire: 03/31/2011
Home Phone: Riley Pavloff
Sponsor: Sponsor Phone
Dues Expire: 04/13/2011
Home Phone:
Sponsor: Sponsor Phone

Status and Enroll Date

Member ID, Name, and Address
Dues Expiration Date & Sponsor

App
```
‘Arrears’ Reports and Labels

The Arrears Reports and Labels option allows you to produce detailed reports about members in your Unit that have let their dues lapse. Arrears reports can be created for All Members or by a given month. Labels can also be created for Members in Arrears.

Create ‘Arrears’ Reports

→ Click the Go To menu, scroll down to Reports and Labels, and then scroll to right to select Arrears.

→ After the report setup options appear, click the Reports button.

→ Click the All Members button to create an Arrearage report that displays all status types up until the current date; OR, click the By Month button to display an arrearage report for a specific month.

→ In the Selection area, leave the date at the current (default) date; OR, drop down to choose a specific month.

→ In the Status area, leave the default at ALL to create a report for expiring, expired, and dropped members; OR, click the preferred status per your reporting needs.

→ Choose your preferred Sort option by clicking the radio button that meets your reporting needs (e.g., by Member ID, Name, Dues Expiration Date, or Enrollment Date).

→ Click the Create Report button. Print the report if desired.

→ Create/Print Labels for this report if desired by clicking on the Labels button and choosing print options when they appear; OR, or Close the report.

Example ‘Arrears’ Report

The partial Arrears Report shown at the bottom left illustrates what the report might look like if set up to compile data for All Members and All Status types. This report was also set up to sort by Name. Key data shown on this report includes: MID#, Dues Expiration Date, Sponsor Name, Member Status, and Member Enroll Date.
‘Deposits’ Reports and Labels Views

Report Setup Options:

NOTE: Labels are not an option for this report!

Type, or drop-down, to choose a start date for your report

Type, or drop-down, to choose an end date for your report
‘Deposits’ Reports and Labels

This report allows you to create a Deposit Report that identifies when member dues were received by Moose International and then deposited into your Unit’s account.

- The Deposit Report does NOT include dues paid at the Unit by a New Applicant, nor does it include renewal dues physically paid at the Unit (and then forwarded to Centralized Dues for processing).
- Information displayed in the Deposit Report is populated into the Unit’s LCL.net database via a download from Moose International. To ensure that you receive this data in a timely fashion, be sure to perform your Daily Transmit every day.
- Labels cannot be created for the Deposit Report.
- Please Note: for the most up-to-date and accurate report, log into Moose Admin to use the Deposit List feature. *See Moose Admin Resource Guide for more information on this feature.

Create ‘Deposits’ Reports

→ Click the Go To menu, scroll down to Reports and Labels, and then scroll to right to select Deposit.

→ After the report setup options appear, click the Deposit Date button.

→ In the Date Selection area, leave the Start and End Dates at the default (None) to create a report that identifies all deposits made to the Unit; OR, type or drop-down to identify your Start and End Dates for the report (e.g., weekly, monthly, quarterly date range).

→ Choose your preferred Sort option for your report by clicking the radio button that meets your reporting needs (e.g., sort by Member ID or name).

→ Click the Create Report button. Print the report if desired.

→ Close the report.
Example Partial Deposit Report:

### Deposit Report Details

<table>
<thead>
<tr>
<th>MID</th>
<th>MEMBER NAME</th>
<th>DEBTS EXP. DATE</th>
<th>PAYMENT TYPE</th>
<th>RECEIVED DATE</th>
<th>DEPOSIT DATE</th>
<th>DEPOSIT AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>312345601</td>
<td>Katz, Randy</td>
<td>01/31/2008</td>
<td>Dues</td>
<td>12/22/2006</td>
<td>12/22/2006</td>
<td>$26.00 USD</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>BATCH TOTAL: $26.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>REGULAR DUES BATCH TOTAL: $26.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>LIFE MEMBER DUES BATCH TOTAL: $0.00</td>
</tr>
<tr>
<td>301785132</td>
<td>Hagle, George</td>
<td>11/30/2008</td>
<td>Dues</td>
<td>10/21/2007</td>
<td>10/21/2007</td>
<td>$26.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>BATCH TOTAL: $26.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>REGULAR DUES BATCH TOTAL: $26.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>LIFE MEMBER DUES BATCH TOTAL: $0.00</td>
</tr>
</tbody>
</table>

Batch ID 1 shows dues deposit for 1 member.

Batch ID 2 shows dues deposit for 2 members.
‘Deposits’ Reports and Labels (cont)

Example ‘Deposit’ Report

The example partial Deposit Report shown at the left illustrates what the report might look like if set up to compile data for all dues that were deposited to the Unit by Moose International. Key components on this report include:

- **Report Header Information (top)** – identifies the date/time of the report, the title of the report, and the number of pages in the report.

**NOTE:** Remember to use your Go To Page arrows in the Reports toolbar to move from page to page.

- **Batch # (boxed row)** – Moose International automatically deposits the Unit’s portion of membership dues via ‘Batch Deposits.’ A batch can include information for one or more members (see Batch ID 1 and Batch ID 2 at the left). Deposit Date, a Batch ID number, and the total deposit amount (per batch) is identified on the report.

- **Member Deposit Details (under Batch ID row)** – identifies the Members:
  - MID# and Name,
  - Dues Expiration Date,
  - Payment Type (e.g., regular dues payment or a life membership payment),
  - Date payment received by Moose International,
  - Date deposit was Made by Moose International,
  - Actual Deposit Amount made to the Unit from the Member’s payment.

- **Batch Totals** – identifies the total dues amount deposited, the total for regular dues deposits, and the total for life dues deposits. GRAND TOTALS are provided at the end.
‘Member Payments’ Reports and Labels Views

Report Setup Options:

NOTE: Labels are not an option for this report!

Type, or drop-down, to choose a start date for your report

Type, or drop-down, to choose an end date for your report
‘Member Payments’ Reports and Labels

The Member Payments Report allows you to create a report that identifies when your Members paid their regular dues or their life dues. This report provides the same basic data as previously described for the Deposit Report. The Member Payments Report, however, displays the payment data in a row-by-row format.

Similar to the Deposit Report:

- The Member Payment Report does NOT include dues paid at the Unit by a New Applicant, nor does it include renewal dues physically paid at the Unit (and then forwarded to Centralized Dues for processing).

- The Member Payment Report data is populated into the Unit’s LCL.net database via a download from Moose International. To ensure that you receive this data in a timely fashion, be sure to perform your Daily Transmit every day.

- Labels cannot be created for the Deposit Report.

Create ‘Member Payment’ Reports

→ Click the Go To menu, scroll down to Reports and Labels, and then scroll to right to select Member Payments.

→ In the Date Selection area:
  
  → Accept the ‘Received Date’ default. Clicking the ‘Deposit Date’ produces the same report.

  → Accept the default Start and End Dates (None) to create a report that identifies all payments made to the Unit; OR, type or drop-down to identify your preferred Start and End Dates to narrow the search report display.

  → In the Payment Type area, accept the default (ALL) or drop-down to narrow your search by Dues or Life payment types.

  → Choose your preferred Sort option (e.g., sort by Member ID, member name, or deposit date).

  → Click the Create Report button. Print the report if desired.

→ Close the report.
### Example Partial Member Payments Report:

<table>
<thead>
<tr>
<th>MID</th>
<th>MEMBER NAME</th>
<th>DUES EXP. DATE</th>
<th>PAYMENT TYPE</th>
<th>RECORDED DATE</th>
<th>DEPOSIT DATE</th>
<th>FRI AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>002168499</td>
<td>Kyle Raymond</td>
<td>04/30/2009</td>
<td>Dues</td>
<td>03/17/2008</td>
<td>03/17/2008</td>
<td>$ 26.00</td>
</tr>
<tr>
<td>002282956</td>
<td>Ronald Senty</td>
<td>12/31/2010</td>
<td>Dues</td>
<td>04/15/2009</td>
<td>04/15/2009</td>
<td>$ 10.00</td>
</tr>
<tr>
<td>002282956</td>
<td>Ronald Senty</td>
<td>12/31/2009</td>
<td>Dues</td>
<td>06/10/2008</td>
<td>06/10/2008</td>
<td>$ 12.00</td>
</tr>
<tr>
<td>002200336</td>
<td>Dell Tanner</td>
<td>09/31/2012</td>
<td>Dues</td>
<td>07/18/2011</td>
<td>07/18/2011</td>
<td>$ 8.00</td>
</tr>
<tr>
<td>002200336</td>
<td>Dell Tanner</td>
<td>09/31/2010</td>
<td>Dues</td>
<td>06/10/2008</td>
<td>06/10/2008</td>
<td>$ 12.00</td>
</tr>
<tr>
<td>002200336</td>
<td>Dell Tanner</td>
<td>09/31/2009</td>
<td>Dues</td>
<td>06/10/2008</td>
<td>06/10/2008</td>
<td>$ 26.00</td>
</tr>
<tr>
<td>002200336</td>
<td>Dell Tanner</td>
<td>09/31/2011</td>
<td>Dues</td>
<td>07/19/2010</td>
<td>07/19/2010</td>
<td>$ 10.00</td>
</tr>
<tr>
<td>002137699</td>
<td>Joe Toon</td>
<td>01/31/2011</td>
<td>Dues</td>
<td>04/15/2009</td>
<td>04/15/2009</td>
<td>$ 10.00</td>
</tr>
<tr>
<td>002137699</td>
<td>Joe Toon</td>
<td>01/31/2010</td>
<td>Dues</td>
<td>06/10/2008</td>
<td>06/10/2008</td>
<td>$ 12.00</td>
</tr>
<tr>
<td>002137699</td>
<td>Joe Toon</td>
<td>01/31/2012</td>
<td>Dues</td>
<td>12/19/2010</td>
<td>12/19/2010</td>
<td>$ 8.00</td>
</tr>
<tr>
<td>002137699</td>
<td>Joe Toon</td>
<td>01/31/2013</td>
<td>Dues</td>
<td>12/18/2011</td>
<td>12/18/2011</td>
<td>$ 8.00</td>
</tr>
<tr>
<td>002298138</td>
<td>Bert Verson</td>
<td>09/30/2012</td>
<td>Dues</td>
<td>06/17/2011</td>
<td>06/17/2011</td>
<td>$ 6.00</td>
</tr>
<tr>
<td>002298138</td>
<td>Bert Verson</td>
<td>09/30/2010</td>
<td>Dues</td>
<td>06/10/2008</td>
<td>06/10/2008</td>
<td>$ 12.00</td>
</tr>
<tr>
<td>002298138</td>
<td>Bert Verson</td>
<td>09/30/2009</td>
<td>Dues</td>
<td>06/10/2008</td>
<td>06/10/2008</td>
<td>$ 12.00</td>
</tr>
<tr>
<td>002282956</td>
<td>Ronald Senty</td>
<td>09/30/2011</td>
<td>Dues</td>
<td>08/17/2010</td>
<td>08/17/2010</td>
<td>$ 8.00</td>
</tr>
<tr>
<td>001777612</td>
<td>Ralph Weiley</td>
<td>03/31/2009</td>
<td>Dues</td>
<td>02/15/2008</td>
<td>02/15/2008</td>
<td>$ 26.00</td>
</tr>
<tr>
<td>001777612</td>
<td>Ralph Weiley</td>
<td>03/31/2008</td>
<td>Dues</td>
<td>02/15/2007</td>
<td>02/15/2007</td>
<td>$ 26.00</td>
</tr>
<tr>
<td>001777612</td>
<td>Ralph Weiley</td>
<td>03/31/2011</td>
<td>Dues</td>
<td>02/15/2010</td>
<td>02/15/2010</td>
<td>$ 10.00</td>
</tr>
<tr>
<td>001777612</td>
<td>Ralph Weiley</td>
<td>03/31/2010</td>
<td>Dues</td>
<td>02/15/2009</td>
<td>02/15/2009</td>
<td>$ 12.00</td>
</tr>
<tr>
<td>001805362</td>
<td>Seth Weiley</td>
<td>04/30/2011</td>
<td>Dues</td>
<td>03/17/2010</td>
<td>03/17/2010</td>
<td>$ 10.00</td>
</tr>
<tr>
<td>001805362</td>
<td>Seth Weiley</td>
<td>04/30/2012</td>
<td>Dues</td>
<td>03/17/2011</td>
<td>03/17/2011</td>
<td>$ 8.00</td>
</tr>
<tr>
<td>001805362</td>
<td>Seth Weiley</td>
<td>04/30/2009</td>
<td>Dues</td>
<td>03/17/2008</td>
<td>03/17/2008</td>
<td>$ 26.00</td>
</tr>
<tr>
<td>001805362</td>
<td>Seth Weiley</td>
<td>04/30/2010</td>
<td>Dues</td>
<td>03/17/2009</td>
<td>03/17/2009</td>
<td>$ 12.00</td>
</tr>
</tbody>
</table>

**Total Summary:**

- **GRAND TOTAL:** $ 1,352.00
- **Regular Dues Total:** $ 1,352.00
- **Life Member Total:** $ 0.00
Example ‘Member Payments’ Report

The example partial Member Payments Report shown at the left illustrates what the report might look like if set up to compile data for all dues that were paid to the Unit by Moose International. Key components on this report include:

- **Report Header Information (top)** – identifies the date/time of the report, the title of the report, and the number of pages in the report.

**NOTE**: Remember to use your Go To Page arrows in the Reports toolbar to move from page to page.

- **Member Payment Details (Line Item List)** – identifies the Members:
  - MID# and Name,
  - Dues Expiration Date,
  - Payment Type (e.g., regular dues payment or a life membership payment),
  - Date payment was Received by Moose Int’l,
  - Date the Deposit was made by Moose Int’l to the Unit
  - Portion of the Member’s payment that the Unit keeps.
‘Officer’ Reports and Labels Views

www.mooseintl.org
Navigate to the Resources ribbon found on the bottom of the webpage.
‘Officer’ Reports and Labels

The Officer Reports and Labels option is no longer used by Moose Units! Units must enter Officer data online via the Admin Menu found on the Moose International website. Please see the Admin Menu Resource Manual for further instructions.
‘Member’ Reports and Labels Views

‘Member Status’ Report Setup Options:

‘New Member’ Report Setup Options:

NOTE: Selection options are NOT provided for either a ‘Volunteer’ report or an ‘Active Roster’ report.

BEFORE YOU CREATE REPORTS: Creating reports for ALL members in the Unit will include all active and inactive members – except for deceased and/or expelled members. If the Unit has a large membership base, this type of report could produce a LOT of data. To prevent extended compilation time and print time, it is highly recommended that Units choose a ‘Selection’ option to narrow the data search.
‘Member’ Reports and Labels

The Member Report allows you to create reports about your membership status, including volunteer status, at any given point in time. Four types of reports can be created: Member Status, New Member, Volunteer, and Active Roster reports.

Create ‘Member’ Reports

→ Click the Go To menu, scroll down to Reports and Labels, and then scroll to right to select Member.

→ After the report setup options appear (as shown in the graphic at the left), click the Reports button.

→ Select one of the following four report types:
  
  • **Member Status Report** – Creates a membership status report for ALL members OR for status-specific members. See the Member Status drop-down options in the graphic at the left to view the fourteen different status types available to you.
  
  • **New Member Report** – Creates a report for ALL New Members enrolled in the Unit. See the New Member drop-down options to view the five application types available to you.
  
  • **Volunteer** – Creates a report for those members who have indicated that they would like to volunteer their time, talent, or skill to help support the Unit. Volunteer Report Setup options are shown on the next page.
  
  • **Active Roster** – Creates list of all Active Members in your Unit including MID# and dues expiration date.

→ For a Member Status Report, choose an option from the Member Status Selection drop-down to identify the member status type that you want reported. Accepting the default (ALL) could produce a very large report!

→ For a New Member Report, choose an option from the Application Type Selection area to choose the application type that you want reported.

**NOTE:** Volunteer Report data is pulled from the Member’s ‘Employment Information’ data in LCL.net as shown above. Note that the Volunteer box is checked above. If this box is not checked, the data will not appear on the report.
‘Member’ Reports and Labels Views (cont)

Volunteer Report Setup Options:

Volunteer Report Data pulled from Member’s Employment Information Tab:

Employment Information tab Volunteer Checkbox
### ‘Member’ Reports and Labels (cont)

Create 'Member Reports (cont)

<table>
<thead>
<tr>
<th>Create</th>
<th>‘Member Reports (cont)</th>
</tr>
</thead>
</table>

→ For a **Member Status Report**, choose your preferred report **sorting option** (e.g., by Member ID, Name, Status, or Enroll Date).

→ For a **New Member Report**, choose your preferred report sorting option (e.g., by Member ID, Name, Application Type, or Enroll Date).

→ For a **Volunteer Report**, choose your preferred report sorting option (e.g., by Member ID, Name, or Occupation).

→ For an **Active Roster Report**, choose your preferred report sorting option (e.g., by Member ID or Name).

→ Click the **Create Report** button. Print the report if desired.

→ Create/Print Labels for any one of the following reports if desired; or, Close the report.
  
  → Member Status
  
  → New Member
  
  → Volunteer

**NOTE:** Labels cannot be created here for an **Active Roster Report**.
'Member' Reports and Labels Views (cont)

Example Partial ‘Member Status’ Report:

06/07/2012 - 10:18:30AM

Member Information

09:40:02
June Akay
5555 POLSON
LOT 54
JEFFERSON IL 45570-1074

0212345678

Sponsor: Sponsor name was not found
Home Phone:
Enroll Date: 02/20/1996
Dues Expire: Comp Mail
Status: 02/20/1996

Example Partial Volunteer Report:

06/07/2012 - 9:47:10AM

Member Information

012345678
Randy Katz
123 SUNSET AVE
JEFFERSON IL 60532

Occuption: CARPENTER
Home Phone:

Volunteer Report (by Name)

Total Members Reported: 1

Example Partial ‘Active Roster’ Report:

06/07/2012 - 9:15:13AM

Member ID   Member Name    Dues Expire
0123456788  Ned Avery     12/31/2012
002178555    Ben Bitter    LIFE
0016506006   Jake Bova    12/31/2012
002137698    Donnie Covean 03/30/2012
000324757    Ron Ferrell  09/30/2012
‘Member’ Reports and Labels (cont)

Three partial examples of Member Reports are shown at the left. All reports have a **Report Header** that includes date/time of the report, the title of the report, and the number of pages in the report. All reports have a toolbar in the LCL.net display area that enables you to move from page to page using the **Go To Page arrows**.

**Partial ‘Member Status’ Report**

Key data shown on the *Member Status Report* at the left includes:

- Member ID, Name, Address, Phone, and Sponsor Name
- Member Enroll Date, Dues Expiration Date, Status, and date Status went into effect
- **NOTE:** Labels CAN be printed for this report

**Partial ‘Volunteer’ Report**

Key data shown on the *Volunteer Report* at the left includes:

- Member ID, Name, Address, Phone, and Occupation
- **NOTE:** Labels CAN be printed for this report

**Partial ‘Active Roster’ Report**

Each row in the *Active Roster Report* provides data on one Member. Key data shown in the *Active Roster Report* shown at the left includes:

- Member ID, Name, and Dues Expiration Date
- **NOTE:** Labels CAN be printed for this report option

**NOTE:** Labels can also be printed for New Member Report data (not shown in this manual).
‘Special Dates’ Reports and Labels Views

Report Setup Options for –

Lodges:

- Birth Date
- Dues Expiration Date
- Enroll Date
- Life Date
- Fellow
- Legion
- Past Governor
- Pilgrim
- 25 Club
- PREFERRED MEMBER
- VOLUNTEER OF YEAR
- User Define 1
- User Define 2
- User Define 3

Selection

- All
- Month
- Date

- From Date: 1/1/1940
- To Date: 1/1/1970

Sort

- Member ID
- Date
- Name

Create Report

Chapters:

- Birth Date
- Dues Expiration Date
- Enroll Date
- Life Date
- Academy Of Friendship
- College Of Regents
- Star Recorder
- Past Regent
- User Define 1
- User Define 2
- User Define 3

Selection

- All
- Month
- February
- Date

Sort

- Member ID
- Date
- Name

Create Report

Moose Legions:

- Birth Date
- Dues Expiration Date
- Enroll Date
- Life Date
- Fellow
- Past President
- Elite Ring
- Pilgrim
- Medal Of Honor
- Education Conference
- User Define 1
- User Define 2
- User Define 3

Selection

- All
- Month
- Date

Sort

- Member ID
- Date
- Lodge Number

Create Report

- Refers to MLEC Training

- Within the Jurisdiction

NOTE: Labels can be printed for each of the Reports types shown above.
‘Special Dates’ Reports and Labels

The Special Dates Reports and Labels option allows you to produce more unique or specialized reports about membership status (e.g., birthdays, dates degrees were achieved, higher status accomplishments, etc).

Report setup options for Lodges, Chapters and Moose Legions are identified in the graphic at the left. All Units can create Special Reports for: Birth Date, Dues Expiration Date, Enrollment Date, and Life membership date (as shown above the dashed line). Special award or achievement reports, unique to Lodges, Chapters, and Moose Legions can be created on an as needed basis (as identified below the dashed line in the graphic at the left).

Create ‘Special Date’ Reports

→ Click the Go To menu, scroll down to Reports and Labels, and then scroll to right to select Special Dates

→ After the report setup options appear, click the Reports button.

→ Click the radio button that identifies your preferred report.

**NOTE:** The Education Conference option in the Moose Legion Report Setup will produce completion dates for the 1-day Moose Legion Education Conference training. MLEC attendance dates are downloaded to Moose Legions by Moose International.

→ In the Selection area,

  → Click the Date button and then enter your From and To Dates by typing in the date or selecting from the drop down boxes (as shown in Lodge example at the left); or

  → Click the Month button and then drop down to choose the month (as shown in the Chapter example at the left); or

  → Accept the default (All) to report data for all of your members (as shown in the Moose Legion example at the left).

→ Click the Create Report button. Print the report if desired.

→ Create/Print Labels if desired by clicking the Labels button and then choosing Label Selection and Sort options per your needs.
### Partial Lodge Birth Date Report – all sorted by Date:

<table>
<thead>
<tr>
<th>Name/Address</th>
<th>Date</th>
<th>Home Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/17/2017 10:34:32AM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Don Marley</td>
<td>05/1/1940</td>
<td></td>
</tr>
<tr>
<td>3 Sunset</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jefferson IL 45676-4532</td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/22/2018 01:50:44</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bert Vernon</td>
<td>05/9/1944</td>
<td></td>
</tr>
<tr>
<td>4 Park Pl</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jefferson IL 45676-0934</td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/22/2018 02:56:05</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ronald Sensly</td>
<td>05/3/1951</td>
<td></td>
</tr>
<tr>
<td>678 Simms</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jefferson IL 45676-1734</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Chapter Birth Date Report – by Month and Date:

<table>
<thead>
<tr>
<th>Name/Address</th>
<th>Date</th>
<th>Home Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/25/2012 9:51:52AM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Anita Bryant</td>
<td>02/21/1930</td>
<td></td>
</tr>
<tr>
<td>943 Independence Circle</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mc Henry IL 60050-7109</td>
<td></td>
<td></td>
</tr>
<tr>
<td>09/24/2018 02:36:07</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marianne Jefferson</td>
<td>02/18/1940</td>
<td></td>
</tr>
<tr>
<td>41 Monticello Dr</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Antioch IL 60032</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Moose Legion Fellow Report – by/for All:

<table>
<thead>
<tr>
<th>Name/Address</th>
<th>Lodge</th>
<th>Date</th>
<th>Home Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/08/2012 10:25:22AM</td>
<td>Lodge</td>
<td>472</td>
<td>01/21/1990</td>
</tr>
<tr>
<td>Thomas Beckett Sr.</td>
<td>Lodge</td>
<td>539</td>
<td>06/05/1985</td>
</tr>
<tr>
<td>261 Long John Rd</td>
<td>Lodge</td>
<td></td>
<td>01/21/1990</td>
</tr>
<tr>
<td>Antioch IL 60030-6242</td>
<td>Lodge</td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/08/2012 10:25:22AM</td>
<td>Lodge</td>
<td>472</td>
<td>01/21/1990</td>
</tr>
<tr>
<td>Johnny Carson</td>
<td>Lodge</td>
<td>539</td>
<td>06/05/1985</td>
</tr>
<tr>
<td>126 N Malibu Dr</td>
<td>Lodge</td>
<td></td>
<td>01/21/1990</td>
</tr>
<tr>
<td>Mc Henry IL 60055-7650</td>
<td>Lodge</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Reported: 2</td>
<td>Lodge</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
‘Special Dates’ Reports and Labels (cont)

Three examples of Special Dates Reports are shown at the left. All reports have a **Report Header** that includes date/time of the report, the title of the report, and the number of pages in the report. All reports have a toolbar in the LCL.net display area that enable you to move from page to page using the **Go To Page arrows**.

---

**Partial ‘Birth Date’ Report – By Date**

Key data shown on the example Birth Date Report shown at the top left includes:

- Member ID, Name, Address, and Phone
- Birthdays of all members and in date order

---

**Chapter ‘Birth Date’ Report – by Month**

Key data shown on the example Birth Date Report shown at the middle left includes:

- Member ID, Name, Address, and Phone
- Member birthdays for February only and in date order

---

**Moose Legion ‘Fellow’ Report**

Key data shown on the example Fellow Report at the bottom left includes:

- Member ID, Name, Address, and Phone
- Moose Legionnaire’s Lodge #
- Date (of Fellow Degree)
‘Miscellaneous Code’ Reports and Labels Views

Report Setup Options:

- **Selection**
  - Active Members
  - Inactive Members
  - All Members

- **Sort**
  - Member ID
  - Member Name
  - Miscellaneous Code

One Report Type (no additional reporting options)

No Labels option

Example Miscellaneous Code Rep:

- Created & Defined by the Unit
- Member with Misc Code 2 assigned to his/her record
‘Miscellaneous Code’ Reports and Labels

Recall from Lesson 2 – Members that miscellaneous codes can be created by the Unit to track active and inactive members that have unique qualities, skills, and/or attitudes that may be beneficial for Unit operations (e.g., preferred volunteer, computer specialists, ritual specialists, for example). If the Unit opts to use Miscellaneous codes, these codes would be assigned to a member’s LCL.net record if/when it’s applicable.

The Miscellaneous Code Reports and Labels option allows you to create reports that identify members who have been assigned a miscellaneous code in their membership record.

Access the ‘Miscellaneous Code’ Reports

→ Click the Go To menu, scroll down to Reports and Labels, and then scroll to right to select Miscellaneous Code.

→ After the report setup options appear, choose the preferred Selection option that meets your reporting needs (e.g., report for all active members, all inactive members, or all members).

→ Choose your preferred Sort option for your report by clicking the radio button that meets your reporting needs (e.g., sort by Member ID, Member Name, and/or the Miscellaneous Code).

→ Click the Create Report button. Print the report if desired.

→ Create/Print Labels for this report if desired by clicking on the Labels button and choosing print options when they appear; OR, or Close the report.

Miscellaneous Code Report

Key data shown on the example Miscellaneous Code Report at the bottom left includes:

- Miscellaneous Code #
- Member ID# for members associated with this code
- Member’s Name
‘Deceased’ Reports and Labels Views

Report Setup Options:

Example Deceased Report:

<table>
<thead>
<tr>
<th>MID</th>
<th>MEMBER NAME</th>
<th>DATE OF DEATH</th>
</tr>
</thead>
<tbody>
<tr>
<td>002137703</td>
<td>Colley, Gerald</td>
<td>06/16/1994</td>
</tr>
<tr>
<td>009400386</td>
<td>Risman, Ann</td>
<td>03/15/1996</td>
</tr>
<tr>
<td>002265144</td>
<td>Tine, Laurel</td>
<td>11/13/1995</td>
</tr>
</tbody>
</table>
‘Deceased’ Reports and Labels

The Deceased Reports and Labels option allows you to quickly create a list of deceased members in your Unit. This report can be created to ensure that family members are contacted in a timely fashion after the passing of a member’s death, to honor the passing of fellow members at different times during the year (e.g., Memorial Day, Unit’s Anniversary Date, etc.), or for whatever reason the Unit deems necessary.

NOTE: Dates of death are transmitted to Moose International by the Units during the daily/monthly transmit process.

Access the ‘Deceased’ Reports

→ Click the Go To menu, scroll down to Reports and Labels, and then scroll to right to select Deceased.

→ After the report setup options appear:
  
  → Accept the default Start and End Dates for the report (e.g., None); or
  
  → Choose your preferred report dates by entering the Start and End Dates or by choosing a date from the drop downs.

→ Choose your preferred Sort option for your report by clicking the radio button that meets your reporting needs (e.g., by Member ID or Name).

→ Click the Create Report button. Print the report if desired.

Example Deceased Member Report

Key data shown on the example Deceased Report at the bottom left includes:

• Deceased Member’s MID #, Name, and Date of Death
‘Paid as of Date’ Reports and Labels Views

Report Setup Options:

- **One Report Type** (no additional reporting options)
- **No Labels option**

Example Partial Paid as of Date Report:

```
06/08/2012 - 4:20:52PM

LOYAL ORDER OF MOOSE
MOOSE LODGE JEFFERSON NO. 9999
MEMBER PAID AS OF DATE REPORT

<table>
<thead>
<tr>
<th>MID</th>
<th>MEMBER NAME</th>
<th>DUES EXP. DATE</th>
<th>PAID AS OF DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>012345678</td>
<td>Ned Avery</td>
<td>12/31/2010</td>
<td>04/15/2009</td>
</tr>
<tr>
<td>012345678</td>
<td>Ned Avery</td>
<td>12/31/2012</td>
<td>11/17/2011</td>
</tr>
<tr>
<td>0010060006</td>
<td>Jake Bova</td>
<td>12/31/2012</td>
<td>11/17/2011</td>
</tr>
<tr>
<td>0010060006</td>
<td>Jake Bova</td>
<td>12/31/2010</td>
<td>04/15/2009</td>
</tr>
</tbody>
</table>
```

Dues Payment History by Member Name
‘Paid as of Date’ Reports and Labels

This report allows you to view/analyze a history of your members’ dues payment history over time.

Access the ‘Paid as of Date’ Reports

→ Click the Go To menu, scroll down to Reports and Labels, and then scroll to right to select Dues Paid as of Date.
→ After the report setup options appear:
  → Accept the default Start and End Dates for the report (e.g., None) to view all payment dates recorded in your LCL.net database; or
  → Choose your preferred Start and End Dates for payments made.
→ Choose your preferred Sort option for your report by clicking the radio button that meets your reporting needs (e.g., by Member ID or Name).
→ Click the Create Report button. Print the report if desired.

Example Paid as of Date Report

The partial example report shown at the bottom left identifies what a Paid as of Date Report might look like – without specifying payment Start and End dates and sorting by name.

• Though the Members’ MID# appears in the leftmost column, data is actually sorted in alphabetical order of the members’ last name.
• A history of all member payments appears in the rightmost column of the report. Notice that the Dues Expiration Date appears to the left of the actual Paid as of Date. This enables Unit’s to analyze payment trends for each of its members if necessary.
Customized Reports (Export Utility)

1. Click data FIELDS to export.
2. ADD fields as desired to Export Fields area. Move up or down if necessary.
3. NAME and SAVE your report; Browse for preferred ‘save’ location if necessary.
4. Click Export.
Customized Reports (Export Utility)

LCL.net’s Export utility enables Units to create and export report data that is customized by the Unit. Refer to the graphics at the left as the export report process is described below.

Access the ‘Export’ Utility

→ Click the Go To menu and scroll down to select Export.

→ After the Export Utility screen appears (similar to the one shown in the graphic at the left):

1a. View the Membership Field data options to decide which fields you’d like to include in your report (see area 1a).

2a, 2b, and 2c. Click on a Membership field name to highlight it and then click the Add button to move it to the Export Fields area (as shown in 2a and 2b). Any data that you add here will appear on your report. Narrow your report criteria further (if desired) to choose Membership Status options for your report (as shown in 2c). Repeat this step until you have added all Membership data desired for your report.

1b. View the Fraternal Unit data options to decide which fraternal unit data you’d like to include in your report. Click the Add button to move it to the Export Fields area. Any data that you add here will appear on your report. Repeat this step until you have added all Membership data desired for your report.

NOTE: If you change your mind about adding a data field to your report, click the ‘< Remove’ and/or ‘<< Remove All’ button to remove the field from your report setup. Click the field that you want to remove and then click the < Remove button to remove it from the list.

→ 3. Name your report in the ‘Filename’ text box and choose the File Location for your saved report (as shown in area 3). Use the Browse button to check folders on your computer if necessary.

→ 4. Click the Export button to save your report and access it later.
Example Export Report Views

Example Setup for: Dues Expiration Report (by date, MID#, Name and Email):

Example Partial Report Output – with formatting edits made:
Example Exported Report

Example Exported Report Procedure

→ Click the Go To menu and scroll down to select Export.
→ Choose desired Membership and/or Fraternal Unit data fields (e.g., Dues Expiration Date, Member ID, Last Name, First Name, and Email Address as shown in the example at the top left).
→ Choose preferred Membership Status options if desired (e.g., ‘Active’ as shown in the example at the top left).
→ Define your Export Options:
  → Header Row at Beginning of File (e.g., checkbox clicked to include header row)
  → Delimiter Character (e.g., separate data fields with a comma)
  → Filename (e.g., ‘Dues Exp Report by Email’)
  → File Location (e.g., Browse to select/store it on the computer’s desktop).
→ Click Export.

Example Partial Report

The graphic at the bottom left identifies part of the example Dues Expiration Report that we customized above. Please be aware that some formatting was applied to the report output (e.g., columns were expanded to fit the text and the text in the header row was bolded).

- We located the File named, ‘Dues Exp Report by Email’ on the computer desktop.
- All active members are listed by Dues Expiration Date as designed
- MID#, Member Name, and Member’s Email Address appear after the expiration date – also as requested.
Lesson 8 – Self Check

56. There are 12 default membership reports in LCL.net (see page 8-1).
   S. True
   T. False

57. All ‘default’ LCL.net reports are accessible via the ‘Go To’ menu (see page 8-5).
   X. True
   Y. False

58. Units can customize their own membership/fraternal unit reports by accessing the LCL.net Export utility (see page 8-49).
   T. True
   U. False

59. Units are not required to create and transmit the LCL.net default reports to Moose International (see page 8-19).
   U. True
   V. False

60. ‘Labels’ can be created for all of the LCL.net default reports (see page 8-5).
   P. True
   Q. False

61. Which of the following reports would you most likely want to create to assist with membership building (see page 8-19)?
   C. Arrears Report
   D. Officer Report
   E. Address Change Report