

GRAND LODGE OF MASSACHUSETTS

A.F. & A.M.

MORI MENU TREE

Masonic On-line Registry Interface

Software created and maintained by
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NOTE: Main Menu items are in **BOLD CAPS**, menu items are in **Bold**, and menus that are expanded are indicated with a caret ">". For the moment, this tree refers to the 'old' MORI and once the new MORI is fully operational a new tree may be attempted. This tree attempts to document all Main Menu pull-downs menus or tabs, sub-menu pull-down menus or tabs, sub-sub menu pull-downs or tabs, and as many "buttons" as possible. For additional assistance, a comprehensive help site is available at <<https://moriapp.zendesk.com>>. Sign in for complete access to the various topics.

HOME >

(Brings you to the home dashboard.)

Dashboard

(Displays an editable menu of most visited pages within MORI. Any page that shows a "+Dashboard" link on the lower left of a page is a page that can be placed on your dashboard. It also displays an "Action Item box" of those items that may need action. Clicking anywhere on that box will create a list of each item on a member-by-member basis. Any page in the system may be printed by checking the "Print Page" link on the lower left. Placement, editing, or deletion of the shortcuts may be made by clicking on the "Edit" button. Shortcuts may be dragged to new positions or removed, and titles and descriptions may be changed.)

MEMBERS >

Find Member

(Brings up member search screen. This screen displays searchable criteria, and once selected the right-side panel will display a list of names that met your criteria. It shows name(s), Lodge, current status, MORI "M-number" and an "Actions" button. Clicking on the member's name brings up the member data screen. Clicking on the lodge name brings up the current list of officers. Clicking on the "Actions" button opens a window presenting basic information of the Brother. You can "View" his member data screen, and print a "Label", "Envelope", or his full "Profile". By clicking on the blue lodge name, the list of current officers of your lodge are again presented. By clicking on the member's name, the Member Data screen is displayed.)

Member Data (This editable page presents all the pertinent data concerning the brother, and is based on the data entered in the "Add Member"

screens. The blue buttons in the lower right allow you to print a label, envelope, the members profile, or request a dues card. When the “Edit” button is pressed, the screen reverts to the data entry screen where data can be changed, proposers can be added, a mentor added, Lodge Member Type can be changed, and a check box is presented for a Masonic Funeral and if the brother is a Senior DeMolay.)

Notes (This screen allows you to add anecdotal notes about the brother. Be aware, anything you write in this field is permanent! Do not write anything derogatory or inflammable about the brother. By clicking on the “Edit” button on the right, new notes can be entered. Clicking on “View History” brings up a list of all notes entered, and the author and date and time stamp of them.)

Contact Info (This tab presents all contact information of the member. The respective contact categories are “Correspondence”, “Residential”, “Shipping”, Snowbird”, and “Work”. Each category, if data is displayed, will allow you to print the history of any addresses within that category, and to print a mailing label. To edit or add information, click on the “Edit” button, click on the “Edit” button on the respective field, make the necessary changes, then click on the “Save” button at the bottom. This page, when in the “Edit” mode, will also permit you to check the “Send Trowel” magazine as allowed, whether the member prefers all email or not [do not check this box – ever! It changes this for all lodges the brother may belong to!], and if the brother prefers not to be solicited for funds.)

Memberships (This tab lists all the lodges the brother belongs to and the status of the brother in those lodges. This information can be edited for each lodge but be careful, this data is usually entered and maintained by the Grand Secretary’s Office. Once a change has been made, click on “Save” then “Confirm”. Other data presented shows “Foreign Affiliations” and “Other Affiliations”. Foreign Affiliations are non-Massachusetts lodges, not necessarily non-U.S. lodges or lodges in foreign countries.)

Events (This tab lists all the events associated with degrees and lodge memberships. Events may be added to the member’s record depending on their current status. Current status determines what events are available for posting. The date shows when the event was added. Major events are added by the Secretary for Degree, Affiliation, Bylaws signing, Elected Honorary, or Deceased dates.)

Other Info (This tab lists all the office positions held by a member in lodge or Grand Lodge, any Awards presented along with the clickable history, any Educational courses taken, and any military service. These fields are usually entered by the Grand Secretary’s Office

and are generally based on the Returns of Officers. Each may be edited for corrections or adding supplemental data.)

Photos (This tab permits photos of the member to be uploaded here for display in his member record. Multiple photos may be uploaded and any one may be selected for the profile photo.)

Lodge Info (This tab displays various Mailing Lists and the member can be assigned to any list necessary.)

Add Member (Brings up data entry screen for adding new members. Please enter complete and full names. If the applicant does not have a middle name, check the “None” box. If an applicant prefers to use his first initial and middle name, please enter his preferred name in the appropriate box. New Member data can be entered only after the applicant has been elected to receive the degrees. Read the info box concerning degrees earned elsewhere. When the first page is correct, click on “next” then “Confirm” The data is now saved and a Member number has been issued and is visible in a green box on the dashboard page as well as on the new member’s data page.)

Add Non-Member (Brings up data entry screen form adding Non-Member (Guest).)

Add Affiliate (Brings up search screen for affiliating a member from another Massachusetts Lodge.)

Add Foreign Affiliate (Brings up data entry screen for adding a Foreign (non-Massachusetts) affiliate.)

Pending Foreign Affiliates (Lists the status of pending affiliates.)

Roster (Lists the active members of your lodge and pertinent data for them in .pdf format.)

LODGE > (Brings you to where all membership and meeting data is entered and edited.)

Lodge Info >

Lodge Data (Brings up all data pertaining to the lodge including dates, precedence, building association, district, current lodge and district officers, etc.)

Contact Info (Shows physical address of the lodge and other contact info. You can also print a label or envelope for the lodge.)

Officers (Presents names and contact data of all installed lodge and district officers.)

History > (Lists the history of the lodge and all mergers, lists all returns of Officers filed.)

Officer History (Lists every Brother who has served in any respective office and the years in the office based on the Returns of Officers filed.)

Returns of Officers (Lists the Returns of Officers filed in the system for viewing and printing.)

Demographics (Presents a tally of the membership of the lodge.)

Member Types (Brings up a screen where you can set various classes of members based on dues payments, add new member types, and print out all members based on Member Type.)

Dues Notices (Brings up the dues notice customization form for printing.)

Lodge Summons (Brings up a customizable Lodge Summons form for printing.)

Annual Report (Allows you to bring up and print an Annual Report for a specific year.)

Subordinate Roles (Allows you to set up certain members of your lodge to have read-only access to the MORI records. Three positions are allowed by the Secretary, “lodge webmaster,” “associate secretary,” and “lodge read-only.” Only the Grand Secretary’s Office can assign a Secretary or Assistant Secretary role.)

Returns of Officers (Lists previous Returns of Officers and permits new ones to be added, both for a new installation and for historical purposes.)

Recapitulation (List of members with limited data for comparison, including active members, candidates and members gained and lost for the year with totals at the end.)

Lodge Meetings (This is where the monthly meetings are entered showing the three top officers, numbers of members and numbers of visitors. Past lodge meeting may also be reviewed. When reviewing the

monthly report prior to submitting it, it will show a ‘DRAFT’ watermark until it is submitted. Adding a monthly meeting does NOT close the monthly report! The August report will continue to display a watermark until it is accepted and processed by the Grand Secretary’s Office)

Close Monthly Report (All monthly reports are closed and submitted via this function. Please review your monthly report (see below) prior to submitting it.)

Monthly Report (Monthly reports may be viewed and printed through here.)

Necrology Report (This is where a listing of the departed can be reported. Data can be recalled from within a specified date range, by either when the deaths occurred or reported, and sorted by either the date of death or the brother’s name.)

Events By Date Report (This is a report where a report of all types of membership activity can be retrieved. Actual or recorded dates may be used and the data may be reported as a .pdf or as an .xls spreadsheet file per any valid date range. Data is also presented for all active members who had events happen within the date range. Printing to the “Buffer” places the selected data in a buffer for printing labels or envelopes (see Reports and Labels), or to an .xls spreadsheet file for further manual processing.)

Life Membership Report (This report lists all the Grand Lodge life members who claim your lodge as their “home/mother/blue” lodge. It does not list life members who claim another lodge as their home lodge. The report may be viewed or printed, or saved as an .xls spreadsheet file.)

FINANCIAL >

Dues Process >

Member Types (This is where your “Member Types” can be set up and apply a dues amount to each type. If a dues amount is entered in error after posting dues to members accounts, it can be globally changed by resetting that one type. Member Types can be added or renamed here as well. The “Print” function will print all members assigned to each member type.)

Initialize Dues (Use this form to view the member types and edit individual arrears and current dues. Changes in member types can be made through this screen by clicking on the member’s name and resetting it in the Member Data Screen.)

Setup Dues (This screen is used to set up dues per each member type. If they are not correct, click on “No” and change them on the Member Type screen which is then displayed. If they are correct, click on “Yes”, enter the year for which you will be posting new dues, and click on “Setup.” Be aware however, if any mistakes are made and posted, dues will have to be edited for each member manually.)

Dues Notices (This screen enables you to set up your dues bills for your lodge and customize any additional fund lines, such as for DeMolay, Rainbow, etc. Once you are satisfied, save the form. When ready for printing the dues bills, review the form and hit ‘Print.’ Please review the yellow box at the top of the screen. Options available are printing a dues notice for one member, all members, or members by individual Member Type. Sorting may be done by Last Name or by Zip Code. Dues bills may be printed three per page, or one per [page at top or bottom to permit an attached letter.] Bills may be printed for those who do not owe dues so dues cards may be enclosed and contributions may be received. Dues bills may also be sent only to those in arrears.)

Preview Notices (This screen permits you to include your or a return address or not by clicking on the appropriate button, and whether “Address Service Requested” is to be included on the notice.)

Preview Labels (Returns a sheet of labels (3x10) for printing. Always print labels at 100% with scaling turned off.)

XLS (If the “XLS” button is clicked on the Print Dues Notices screen, the dues information is presented per member in an .xls spreadsheet file.)

Edit Arrears / Dues (This form is where corrections may be made to a member’s dues or arrears. Select the member from the pull-down menu.)

List Paid / Unpaid (This screen permits you to list all payments made per any year, List all Dues and Arrears Owed for either all members, active

members, or individual Dues or Arrears Owed. Clicking on “Print” brings up the report in a .pdf document for printing or saving.)

Member Payments (Member Payments are recorded through this screen. Select the member via the pull-down menu and click on “Find.” Enter the date of the payment, the amount, type of payment, dues category [Set-up in the Budget page], and any comments such as the check number or why a remission was made. Multiple payments to a single brother’s record may be made here to account for other contributions. When finished, click on “Post” and the dues will be posted. The total outstanding dues should update to a \$0.00 outstanding. Any contributions to other funds or accounts will not be reflected in this field. If an error is made, the entry can be deleted and replaced by clicking on the blue “delete” on the right. The history of payments for the respective members is also reflected below the data entry portion.)

Non-Member Payments > (Permits non-members to make non-dues contributions to your lodge.)

Add Payment (Data entry is similar to member payments above but no names are indicated unless entered in Comments.)

Manage Payments (This report lists all non-member payments entered.)

Budget (This data entry screen allows you to create and manage a budget by setting various income and expense categories and indicating budget amounts. Various expense items can be assigned to major expense categories and expense items can have expense limits assigned. A printout lists all payments made during the defined period and balances/total expenses for each expense category. Updated figures may be entered and new categories may be created as needed. Click on the “Update” button to apply the new figures. At the end of your Masonic year, close the period by clicking on the “Close Budget Period” button.)

Vouchers (A Voucher is a form used to request a payment by the Treasurer.) The home screen lists all current vouchers. Vouchers can be edited after payment to indicate the check number issues.

Add Voucher (To create a voucher, click on the “Add” button. It brings you to the voucher creation page where you can assign a voucher number, date, payee, amount, and apply that voucher to an Expense Item. Once saved, the voucher will show this information and print lines for authorizations by the Secretary, Wardens, Master, and Treasurer for attaching it to the bills being presented for payment.)

- Print Voucher** (By printing the voucher, it automatically saves it to MORI and makes it available for recall and tabulation in the annual report.)
- Reports** (Lists all vouchers within a selectable date range or a specific payee)
- Cash Book** (This returns all payments recorded in MORI from dues and other categories per a user selectable sort order within a user selectable date range.)
- Cash to Treasurer** (Displays funds received per income category for payment to Treasurer. Pressing the “Confirm” button will send this report to the Treasurer.)
- Tabulate** (Gathers payments of monies not yet transferred to Treasurer.)
- Find** (Will return a list of past tabulations based on the date selected.)
- Treasurer’s Report** (Displays Receipt Summary report for Treasurer.)
- Secretary’s Report** (Displays all payments recorded by Secretary by date per payment made to Treasurer.)
- Calculate Checkbook** (Calculated checkbook balance based on date entered and last balance.)

MAILING >

Reports / Labels / Email

Reports (This is where some age/longevity-related reports can be generated via the pull-down menu. Member Data Sheets can be printed and sent to some or all members to verify and update data. A Contact List may also be printed with limited information and distributed to officers so they'll be able to contact members as necessary.)

Labels (This is where labels and envelopes can be printed in bulk with numerous options available. Once a topic is selected, "Add to Buffer" should be selected. Once the buffer contains data, choose the respective button for email or no solicitations if a change is warranted. Then select the type of report, or select the type of printout or output, and if you want the data sorted by zip code or last name, then click on "Print.")

XLS Output (If either of the .xls outputs are selected, an .xls file will be created for downloading and manual filtering.)

Email (This offers the ability of sending email to members who have valid email addresses noted in their member records. When the desired group or individuals. Fill in the blank lines, create your message if any, and choose any attachment necessary, such as lodge notice, and click on "submit.")

Mailing Lists (Any number of mailing lists can be created and managed here. Once the name is given, click on "Add" then "Manage" to select those members who you want in that list. Lists may be renamed as well. Once the new name is given, click on "Update" and the new name will be in the list. Pre-loaded mailings lists are also available for all district officers, necessary Grand Lodge recipients, and most other lodge officers within the district based on office.)

Bad Address Report (This is a report generated via the postal services Bad Address Report and presented in a .pdf format.)

HELP >

- About** (Returns copyright and licensing information)
- Help Center** (This logs onto the Enable Labs training and instructional guides along with other informational information.)

ACCOUNT >

- Logout** (Logs out the current user.)
- Update Account** (Use this data entry form to change the user's password along with other user selectable choices. The Secretary's return address can be changed here as well.)
- [List of accessible lodges]** (Any other lodges the user has access to are listed here.)