Lodge Manager Getting Started Notes

1) Add Lodge Members

Each member is added by clicking the **Add Member** button on the main page (above the members list). You will need to add an email address for each member if you want them to be able to login. It is not essential however (you can leave it blank and click next). Lodge Manager can be used entirely as just a membership database for the secretary if preferred.

Remember the following points when creating members:
- remember to click **Receive Documents in the Post** or **Receive Documents by email**. If they are both left un-ticked, you will get a warning on the main page
- remember to tick the **Secretary** box for all people you wish to be able to make changes to meetings and member information.
- If you want any member to be able to login to lodge manager and check for meetings as well as view other members contact details, you will need to click on the **Invite Member to Join** button .
- If a person resigns from the lodge, you need to **Resigned** date, they will then appear in the no longer members section if the date is in the past

2) Add any permanent Invited Guests
Sometimes people want to be kept up to date with when meetings occur or visit the

lodge/chapter on a regular basis. By clicking on the **Add** button above the **Guests of Lodge** section, you can add people that will not have full access to the system i.e. they will not see other members contact details but they will be able to login and download the summons (providing secretary has uploaded it of course).

3) Save officers for current year
Click on the **Officers** tab then click **Appoint Officers**. You don't have to maintain this section but if you do, you will get a list of offices held when viewing each members page.

4) Update the secretary settings
Once you have decided which people should have secretary rights (there may only be

one of course), click on the **Secretary Settings** button

At the top of the page where it says **Current Secretary**, set the current secretary from the drop down list then click **Save**.

If there is only one person with secretary rights, click **Save** anyway to set it up. From now on, all emails sent out about meetings will appear as coming from this person.

Check the **Regular Email** message in this section. This is the text that is created when you add a regular meeting. It is just to save time basically.

You may also want to enable an annual subs reminder email that can be scheduled to either be sent out or just appear on the scheduler when people login.

5) Add regular meetings
Click on the **Regular Meetings** tab. This is where you set up all your L of I and other meetings that occur throughout the year. The meetings are scheduled in the calendar on the main page up to 1 year in advance. Each time a meeting is finished with, another meeting is automatically scheduled for 12 months time.

It is recommended that if the meeting normally involves sending out documents then the **Send Reminder** option is set to **Send No Reminder** otherwise the secretary might end up with meeting reminders being sent out before he can attach the electronic documents.

If you want lodge manager to ask members questions such as whether they will be dining and provide details of their guests, please tick the 4 boxes at the bottom of the page.

6) Start adding lodge documents etc to the next up and coming meeting
Once the meeting has been created, documents can then be attached. There is a separate section to send out the documents to the permanent lodge guests also. The meeting invite can either be set to occur immediately or scheduled to be sent out sometime before the meeting (depending on the Send Reminder dropdown box)

7) Add any secretary reminders if needed
This facility allows the secretary to have reminders appear on the main diary page. He can also set the reminders to send out an email. Other members who do not have secretary permissions will not see these reminders when they login.

8) Maintaining attendance for a meeting
Once the next meeting is coming up, the secretary can keep track of who is attending, who is dining and details of each members guests. This is all done by clicking on the meeting in the calendar list, then Clicking on the **Attendance** tab.

9) Schedule a monthly backup of the membership data (Secretary Settings)
This facility allows the membership information to be emailed in spreadsheet form to the current secretary every month as a backup. Useful in case there are temporary problems in accessing the internet or Lodge Manager.

If you have any questions about using lodge manager, you can also email
contact@lodgemanager.co.uk