



# Modern Tools for Lodge Management

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ASSISTANT GRAND SECRETARY

**LODGE LEADERSHIP RETREAT 2026**

# Why This Matters



Your role is more than admin—it's connection.



The right tools make communication consistent and simple.

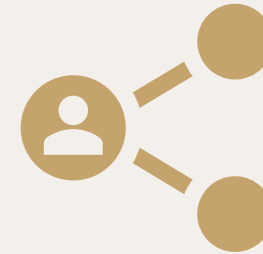


**What do you use iMember for?**

# iMember Is More Than Dues



It's your member engagement dashboard.



All-in-one hub for events, messages, records.



**How easy is it for your lodge to communicate with all its members right now?**

# Four Tools to Make Life Easier



NEWSLETTER  
ANNOUNCEMENTS



SURVEYS



FILE VAULT



EVENTS

# Newsletter Announcement

# Create a Newsletter Post



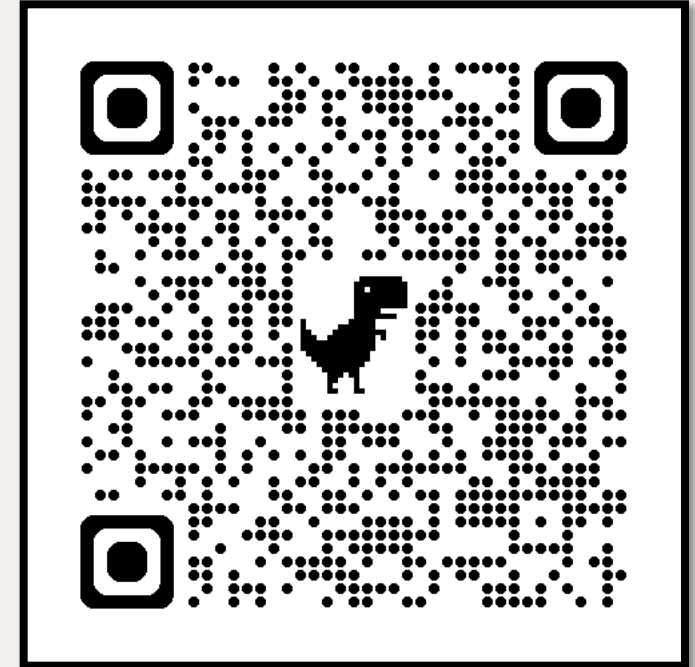
USE THE BUILT-IN CONTENT  
EDITOR.



SEND TARGETED MESSAGES  
TO YOUR MEMBERS.

# How to Create a Newsletter Announcement

1 Navigate to <http://member.freemason.org>

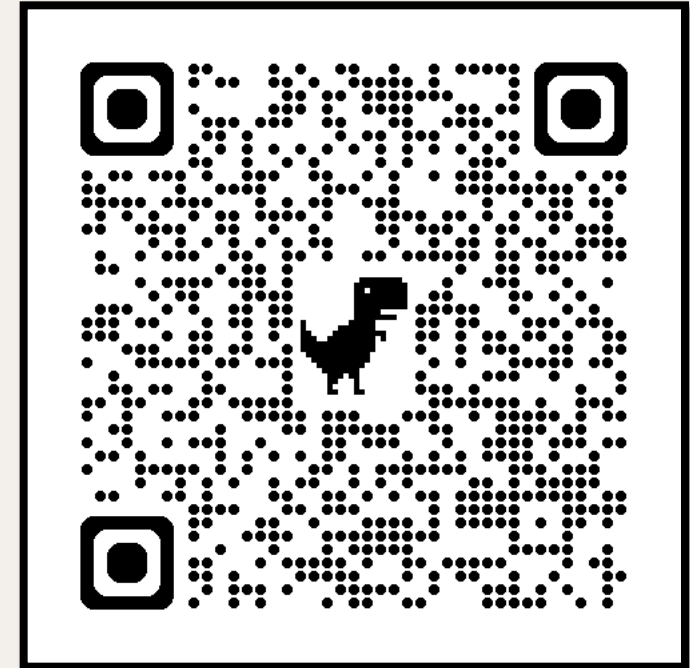
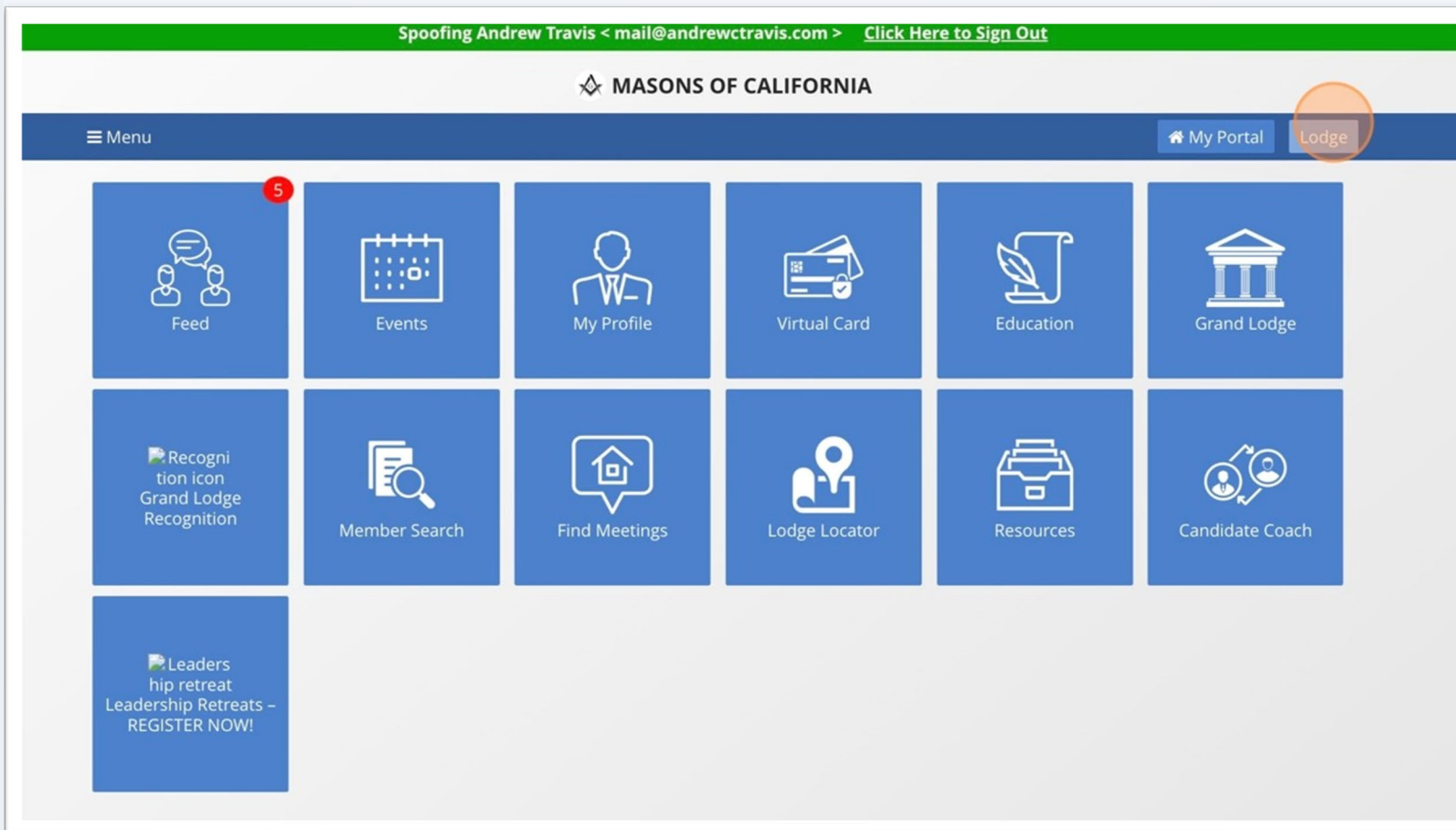


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# How to Create a Newsletter Announcement

2

Navigate to the Lodge dashboard by clicking "Lodge"



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# How to Create a Newsletter Announcement

3

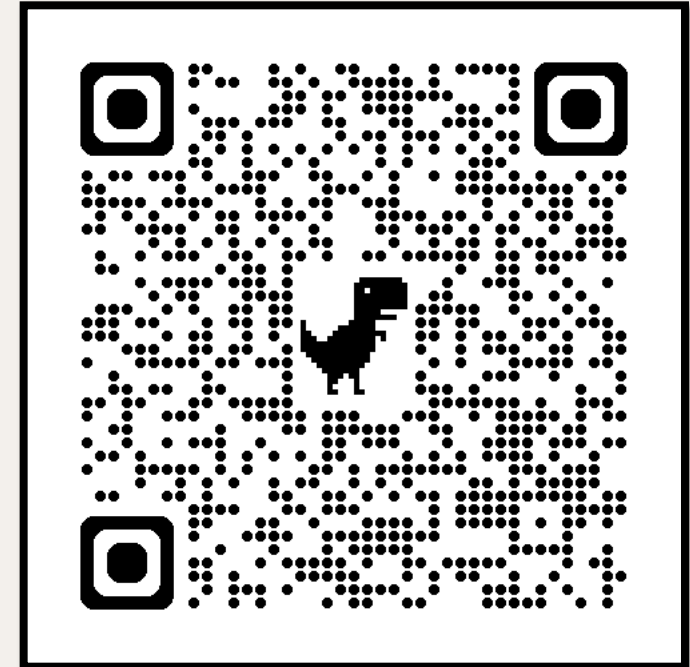
Before setting up the newsletter announcement, review your distribution lists by clicking "Distribution Lists"

The screenshot displays a web dashboard with a sidebar on the left and a main content area. The sidebar includes navigation options: Dashboard, Members, Spouses/Widows, Other Contacts, Newsletters (formerly Posts), Meetings & Events, Reports & Labels, List Builder (formerly Report Builders), Tasks, Resources & Forms, and Distribution Lists (highlighted with a red circle). The main content area features a task bar at the top with "~ No tasks ~". Below this are several data sections: "Member Workflows" with a "Prospect" link and a count of 11; "Member Pipeline" with "Fellowcraft" (3) and "Master Mason" (20); a "Recap 07/01/2023 to 06/30/2024" table showing "Total Gains" of 4 and "Total Losses" of -1; "Lodge Operations" with links for "Dues Verification" and "Audit Report"; "Dues Summary" with a pie chart showing categories like "endowed", "exempt", and "paid"; "Member Engagement" with four donut charts representing different engagement metrics; and "Age Dispersion" with a pie chart showing age groups like 18-29, 30-39, 50-59, 60-69, and 70-79.

Member Workflows	Mem. Ct.
<a href="#">Prospect</a>	11

Member Pipeline	Mem. Ct.
<a href="#">Fellowcraft</a>	3
<a href="#">Master Mason</a>	20

Recap 07/01/2023 to 06/30/2024		Mem Ct.
<b>Total Gains</b>		<b>4</b>
Degree - Raised - MM		2
Affiliated		2
Reinstated		0
Transfer Out		0
Dropped-NPD Primary Lodge		0
Transfer In		0
<b>Total Losses</b>		<b>-1</b>
Deceased		0
Suspended NPD		-1
Suspended by Trial		0
Expelled		0
Merged Out		0



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# How to Create a Newsletter Announcement

4 Choose the list you wish to review.

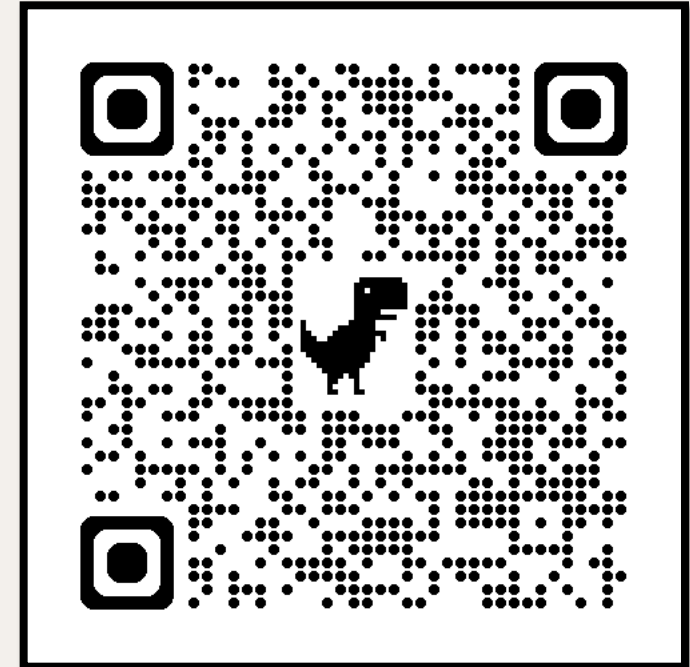
Masons of California

LOGOS  
LODGE NO. 861  
DISTRIBUTION LISTS

DISTRIBUTION LISTS >>

Tip: Drag and drop table row to re-order lists.

Name	Type	Status	Subscribers Count
Mailing List - Fellowcraft	Mailing List	Active	3
Mailing List - Master Mason	Mailing List	Active	4
Mailing List - Entered Apprentice	Mailing List	Active	2
Mailing List - Misc. Contacts	Mailing List	Active	0
Email List - Fellowcraft	Email List	Active	4
Email List - Master Mason	Email List	Active	8
Email List - Entered Apprentice	Email List	Active	1
Email List - Misc. Contacts	Email List	Active	3
All Members	Email List	Active	0
Text List - Fellowcraft	SMS / Text List	Active	2
Text List - Master Mason	SMS / Text List	Active	6
Text List - Entered Apprentice	SMS / Text List	Active	0
Text List - Misc. Contacts	SMS / Text List	Active	0
Charitable Solicitations		Active	2
Mailed Publications		Active	2
Lodge Trestleboard		Active	0



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# How to Create a Newsletter Announcement

5

Review the subscribers, and if you wish to add other people to the list, click the down arrow next to "Active members and misc. contacts not subscribed to list"

DISTRIBUTION LISTS >> MAILING LIST - MASTER MASON (ACTIVE MAILING LIST)

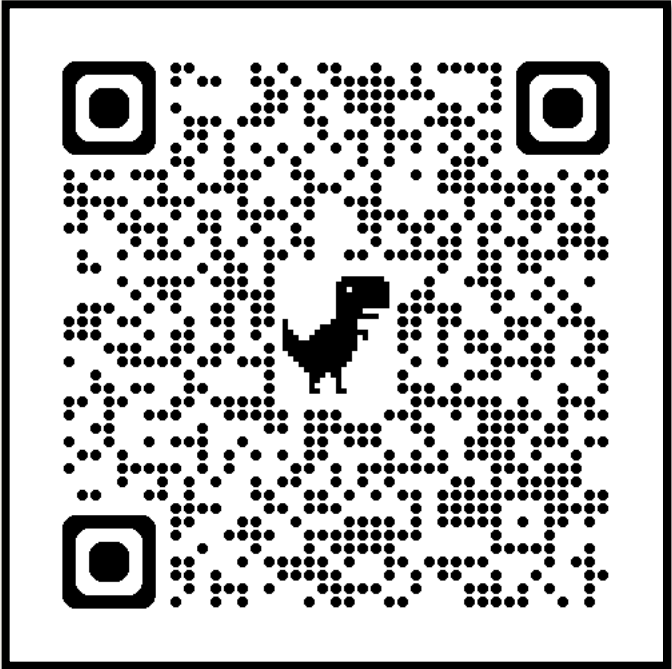
E - Email M - Mobile Phone H - Home Phone W - Work Phone

**Subscribers (4)**

Search all fields below

Name	Contact Info	
Joseph Alvero Rezendes #362860 - Master Mason	1177 California St Apt 902 ,San Francisco, CA 94108-2212	<a href="#">Un-Subscribe</a>
Kevin M. Jones #367768 - Master Mason	1066 41st Ave Unit C202 ,Capitola, CA 95010-3950	<a href="#">Un-Subscribe</a>
Khalil H Sweidy #204146 - Master Mason	1329 Clay St Apt 2 ,San Francisco, CA 94109-4146	<a href="#">Un-Subscribe</a>
Nathan Samuel Orlandi #385687 - Master Mason	537 5th St ,Montara, CA 94037	<a href="#">Un-Subscribe</a>

**Active members and misc. contacts not subscribed to list (24)**



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# How to Create a Newsletter Announcement

6 For any contact you wish to add, click "Subscribe" next to their name

LOGOS LODGE NO. 861

DISTRIBUTION LISTS

DISTRIBUTION LISTS >> MAILING LIST - MASTER MASON (ACTIVE MAILING LIST)

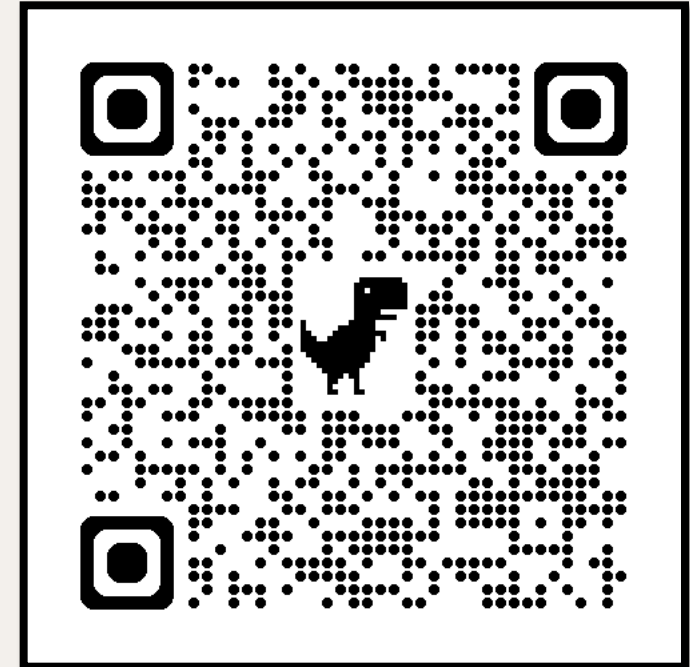
E - Email M - Mobile Phone H - Home Phone W - Work Phone

Subscribers (4)

Active members and misc. contacts not subscribed to list (24)

Search all fields below

Name	Address	Contact	
Adam R Dexter #391795 - Fellowcraft	207 Gough St Apt 20 San Francisco, CA 94102-5956	E: adam@adamdexter.net M: 6177911005	Subscribe
Alexander Seyfert #351924 - Master Mason	4183 24th St San Francisco, CA 94114-3614	E: alexanderseyfert@gmail.com M: 6692245060	Subscribe
Andrew Charles Travis #360251 - Master Mason	17903 Lightfoot Way Nevada City, CA 95959-9132	E: andrew.travis@logoslodgca.org M: (415) 987-7164	Subscribe
Benjamin Avram Soler #382915 - Master Mason	1594 43rd Ave San Francisco, CA 94122-2955	E: benjamin.soler@gmail.com M: 415-410-3305	Subscribe
Christopher John Whittaker #384350 - Fellowcraft	1330 McAllister St A San Francisco, CA 94115	E: chriswhitt147@gmail.com M: (805) 914-9421	Subscribe
Denise Wong Valles -- Spouse of Omar Carvajal Merlos #326206 - Master Mason	721 Chestnut St San Francisco, CA 94133-2274	E: omar@captainkittycat.net No Preferred Phone Set	Subscribe
Eugenia Timasheva -- Spouse of Kevin M. Jones #367768 - Master Mason	1066 41st Ave Unit C202 Capitola, CA 95010-3950	E: jones.kevin@gmail.com No Preferred Phone Set	Subscribe
Hannah Seyfert -- Spouse of Alexander Seyfert #351924 - Master Mason	4183 24th St San Francisco, CA 94114-3614	No email No Preferred Phone Set	Subscribe
James Lewis Tucker #345332 - Master Mason	11945 Mays Canyon Rd Guerneville, CA 95446-9718	E: james.tucker@logoslodgca.org H: (732) 822-4693	Subscribe



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# How to Create a Newsletter Announcement

7 Click the "Confirm & Subscribe" button for that individual.

LODGE NO. 861  
DISTRIBUTION LISTS

E - Email M - Mobile Phone H - Home Phone W - Work Phone

Subscribers (4)

Active members and misc. contacts not subscribed to list (24)

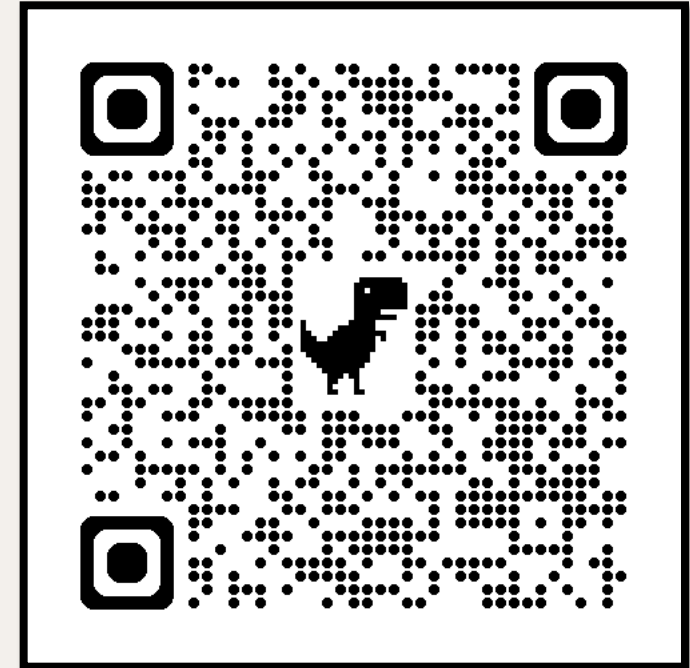
Search all fields below

Name	Address	Contact	
Adam R Dexter #391728 - Fellowcraft	207 Gough St San Francisco, CA 94114-3614	E: adam@adamdexter.net M: (415) 77911005	Subscribe
Alexander Seyfert #351924 - Master Mason	1831 42nd Ave San Francisco, CA 94114-3614	E: alexanderseyfert@gmail.com M: (415) 92245060	Subscribe
Andrew Charles Travis #351924 - Master Mason	462 Lightfoot Way San Jose, CA 95059-9132	E: andrew.travis@logoslodgeca.org M: (415) 987-7164	Subscribe
Benjamin Avram Soler #382915 - Master Mason	1631 42nd Ave San Francisco, CA 94122-2955	E: benjamin.soler@gmail.com M: 415-410-3305	Subscribe
Christopher John Whittaker #384350 - Fellowcraft	1330 McAllister St San Francisco, CA 94115	E: chriswhitt147@gmail.com M: (805) 914-9421	Subscribe
Denise Wong Valles -- Spouse of Omar Carvajal Merlos #326206 - Master Mason	721 Chestnut St San Francisco, CA 94133-2274	E: omar@captainkittycat.net No Preferred Phone Set	Subscribe
Eugenia Timasheva -- Spouse of Kevin M. Jones #367768 - Master Mason	1066 41st Ave Unit C202 Capitola, CA 95010-3950	E: jones.kevin@gmail.com No Preferred Phone Set	Subscribe
Hannah Seyfert -- Spouse of Alexander Seyfert #351924 - Master Mason	4183 24th St San Francisco, CA 94114-3614	No email No Preferred Phone Set	Subscribe
James Lewis Tucker #345332 - Master Mason	11945 Mays Canyon Rd Guerneville, CA 95446-9718	E: james.tucker@logoslodgeca.org H: (732) 822-4693	Subscribe
Kevin Anthony Hackett #324146 - Master Mason	1814 Anza St San Francisco, CA 94118-3723	E: kevin@siolstudios.com M: (415) 509-1224	Subscribe

Back to Top ^

**Subscribing Alexander Seyfert #351924 - Master Mason**

Confirm & Subscribe



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# How to Create a Newsletter Announcement

8

When you are done subscribing contacts to your distribution list, Click the house icon to return to your Lodge dashboard.

Masons of California

LOGOS  
LODGE NO. 861  
DISTRIBUTION LISTS

DISTRIBUTION LISTS >> MAILING LIST - MASTER MASON (ACTIVE MAILING LIST) >>

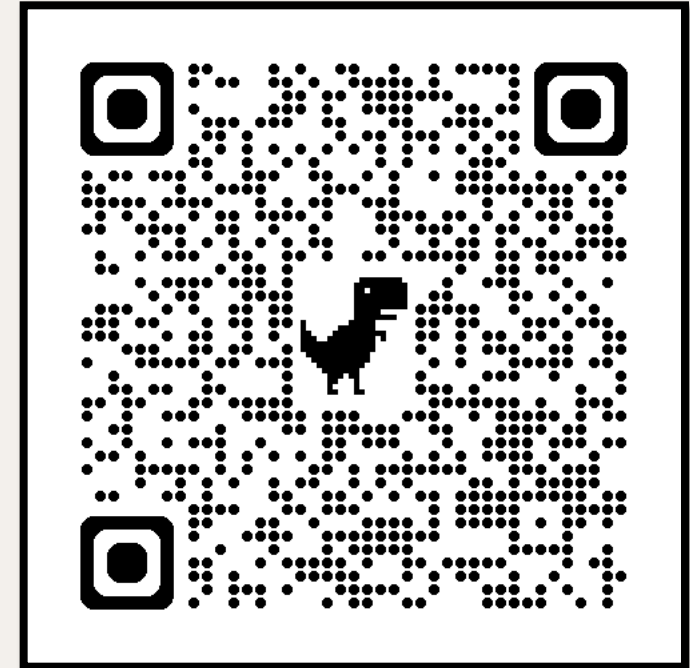
E - Email M - Mobile Phone H - Home Phone W - Work Phone

Subscribers (5)

Search all fields below

Name	Contact Info	
Alexander Seyfert #351924 - Master Mason	4183 24th St ,San Francisco, CA 94114-3614	Un-Subscribe
Joseph Alvero Rezendes #362860 - Master Mason	1177 California St Apt 902 ,San Francisco, CA 94108-2212	Un-Subscribe
Kevin M. Jones #367768 - Master Mason	1066 41st Ave Unit C202 ,Capitola, CA 95010-3950	Un-Subscribe
Khalil H Sweidy #204146 - Master Mason	1329 Clay St Apt 2 ,San Francisco, CA 94109-4146	Un-Subscribe
Nathan Samuel Orlandi #385687 - Master Mason	537 5th St ,Montara, CA 94037	Un-Subscribe

Active members and misc. contacts not subscribed to list (23)



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# How to Create a Newsletter Announcement

9 Click "Newsletters (formerly Posts)"

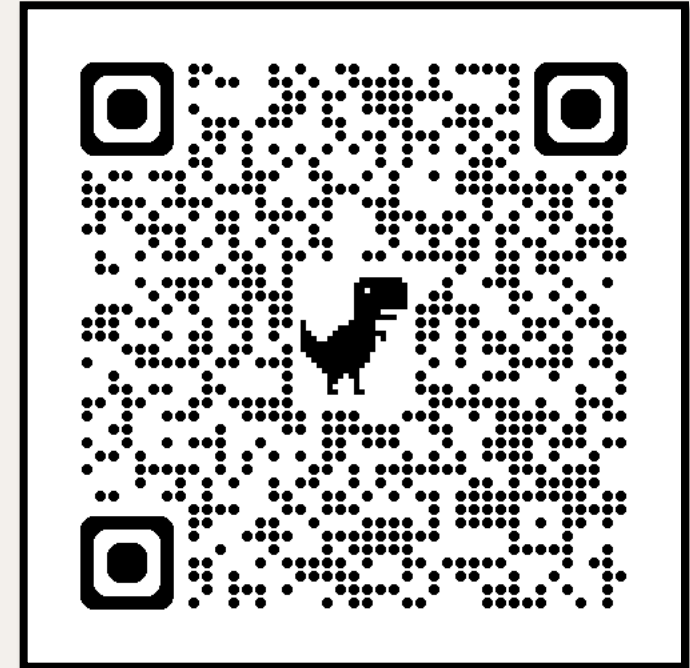
The screenshot shows the 'Masons of California' dashboard. The left sidebar contains a menu with the following items: Dashboard, Members, Spouses/Widows, Other Contacts, Newsletters (formerly Posts) (highlighted with an orange circle), Meetings & Events, Reports & Labels, List Builder (formerly Report Builders), Tasks, Resources & Forms, and Distribution Lists. The main content area displays a 'DASHBOARD' header with search and user icons, a 'Tasks' section with a table showing no tasks, and several summary cards for 'Member Workflows', 'Member Pipeline', 'Lodge Operations', 'Dues Summary', and 'Member Engagement'. The 'Recap 07/01/2023 to 06/30/2024' table is also visible.

Tasks	Type	Due	Status
~ No tasks ~			

Member Workflows	Mem. Ct.
Prospect	11

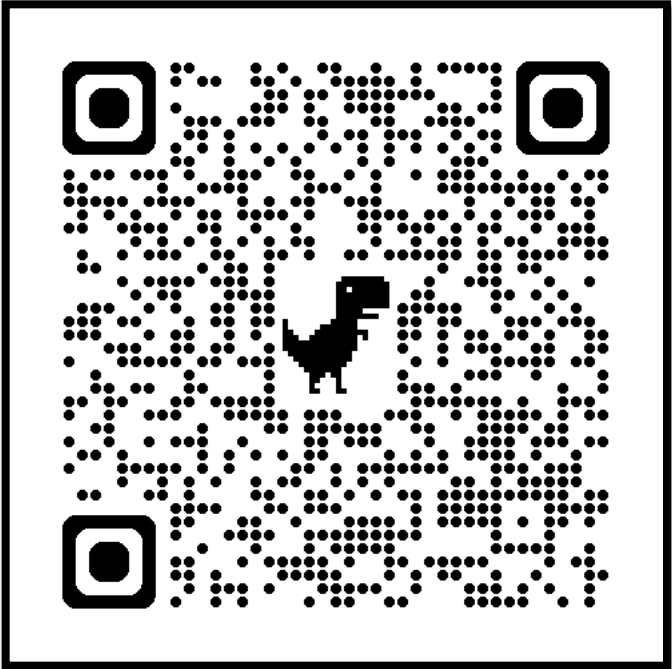
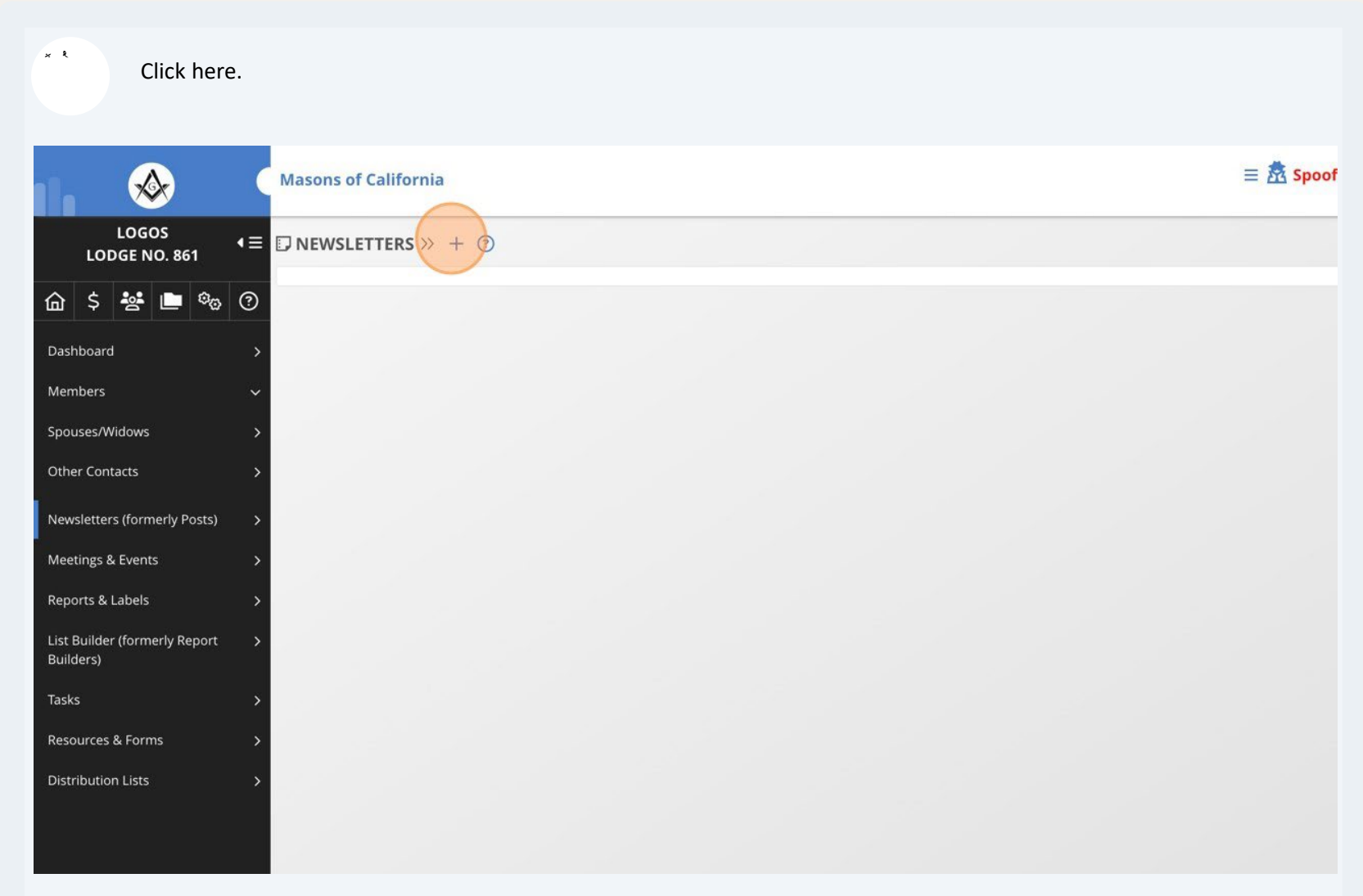
Member Pipeline	Mem. Ct.
Fellowcraft	3
Master Mason	20

Recap 07/01/2023 to 06/30/2024	Mem Ct.
<b>Total Gains</b>	<b>4</b>
Degree - Raised - MM	2
Affiliated	2
Reinstated	0
Transfer Out	0
Dropped-NPD Primary Lodge	0
Transfer In	0
<b>Total Losses</b>	<b>-1</b>



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# How to create a Newsletter Announcement



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# How to create a Newsletter Announcement

11 Enter the subject for the newsletter

Masons of California

LOGOS  
LODGE NO. 861  
NEWSLETTERS

NEWSLETTERS >> CREATING NEWSLETTER

Step 1: Subject & Template

\* Subject

Select a template to continue (you can click on template name to view in a new tab)

Logos No. 861  
Grand Lodge Of California, F & AM

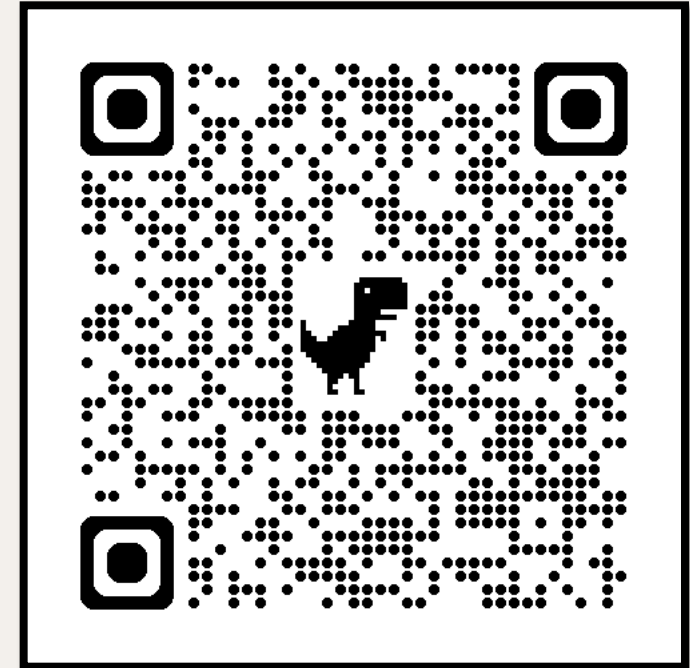
Logos No. 861  
Grand Lodge Of California, F & AM

Logos No. 861  
Grand Lodge Of California, F & AM

Template 1

Template 2

Template 3

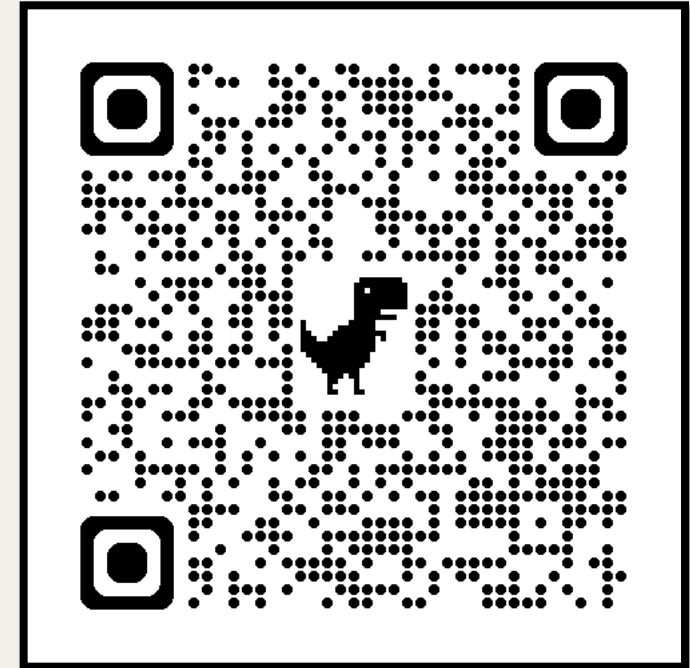


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# How to create a Newsletter Announcement

Select the template for the email, and click the "Next: Edit" button

The screenshot shows an email creation interface. At the top, there is a subject line field containing "March Master Mason Degree for John J. Newmember". Below this, a prompt reads "Select a template to continue (you can click on template name to view in a new tab)". Three template options are displayed, each with a Masonic logo and placeholder text. The first template is labeled "Template 1", the second "Template 2", and the third "Template 3". At the bottom of the interface, there are two buttons: "Next: Edit" (highlighted with an orange circle) and "Cancel". A sidebar on the left contains navigation icons for home, currency, people, folders, settings, and help.



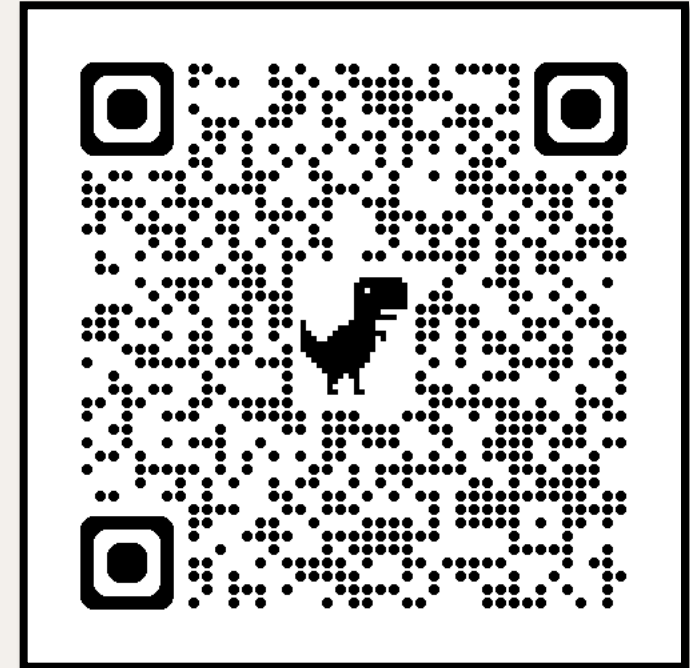
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# How to create a Newsletter Announcement

13 Enter the text of your message in this box.

Powered by Froala Characters : 409

[Next: Preview](#)



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# How to create a Newsletter Announcement



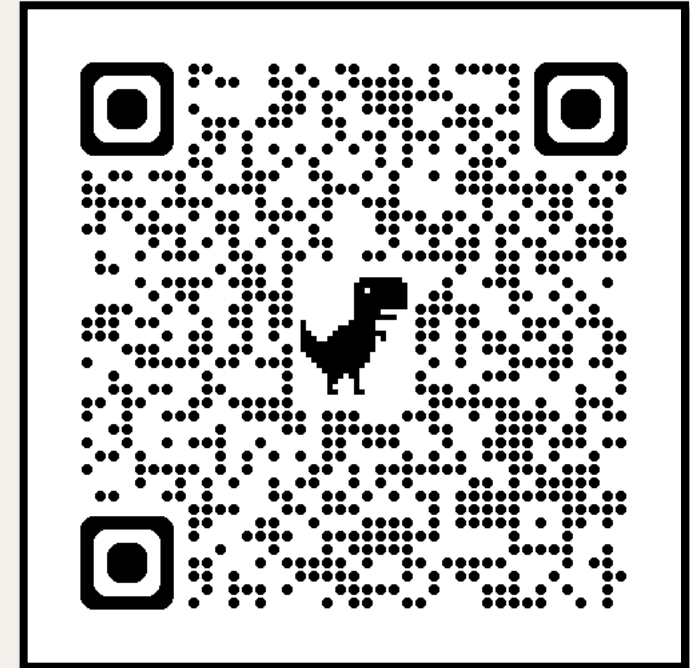
Click the "Next: Preview" button.

The screenshot shows a web-based newsletter editor. At the top, there is a header with a Masonic logo and the text "Logos No. 861" and "Grand Lodge Of California, F & AM". Below the header is a text area containing the following draft announcement:

Dear Brethren,

You are cordially invited to attend the **Master Mason Degree** for **Brother John J. Newmember** on **Monday, March 17, 2025**, at **Freemasons Hall in the California Masonic Memorial Temple**. The **Special Meeting** will open at **6:30 PM**, with the **degree commencing immediately thereafter**. Following the ceremony, we will gather for a **Festive Board at 8:15 PM** to celebrate our newly raised Master Mason. **Attire for the evening is an evening suit (tuxedo)**. Please RSVP with our Secretary, **Brother Travis**, no later than **March 1, 2025**. We look forward to seeing you for this important occasion!

At the bottom of the editor, there are three buttons: "Next: Preview" (highlighted with an orange circle), "Save as Draft", and "Cancel". The interface also includes a sidebar with navigation icons and a footer with "Powered by Froala" and "Characters : 63".



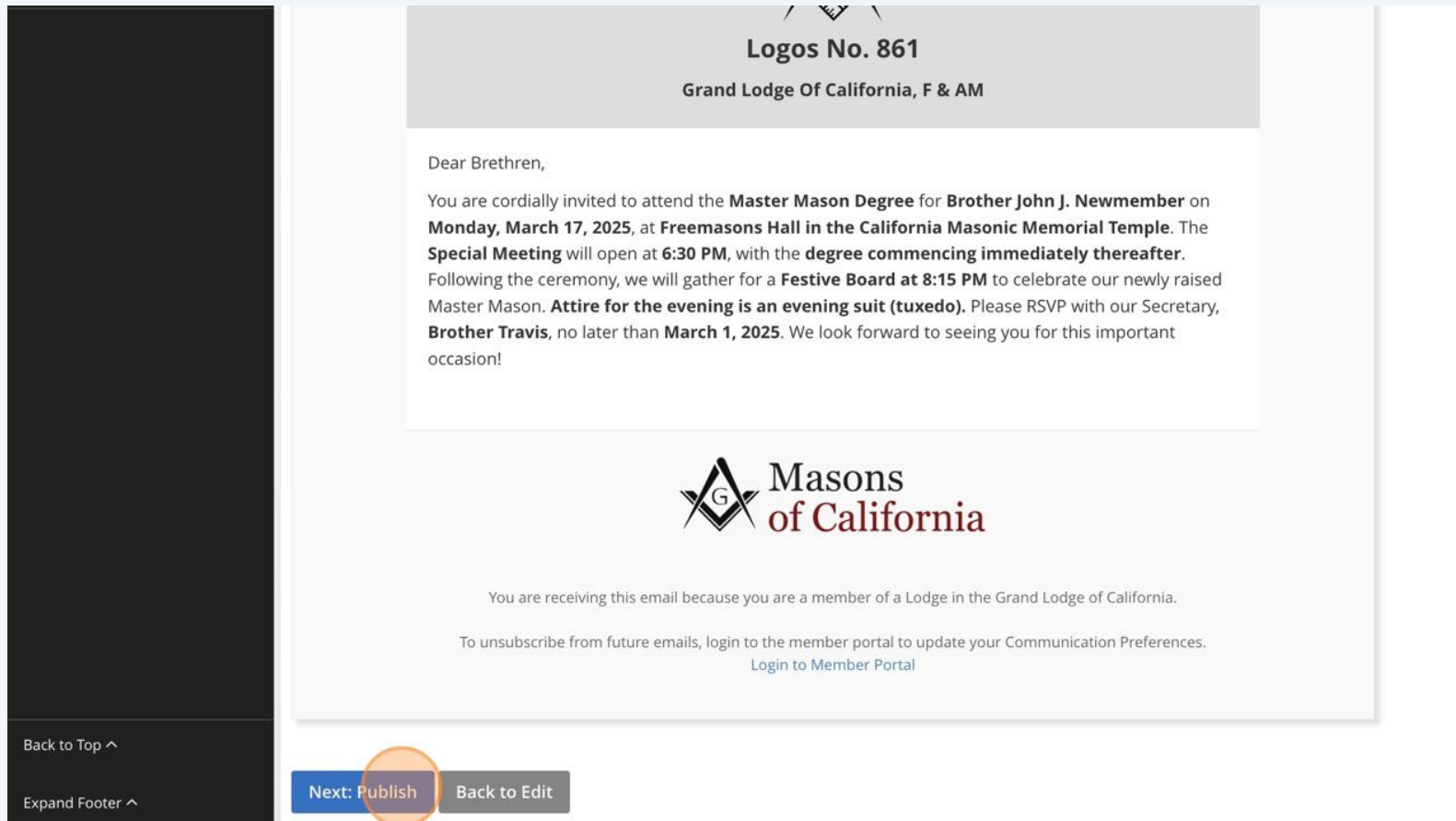
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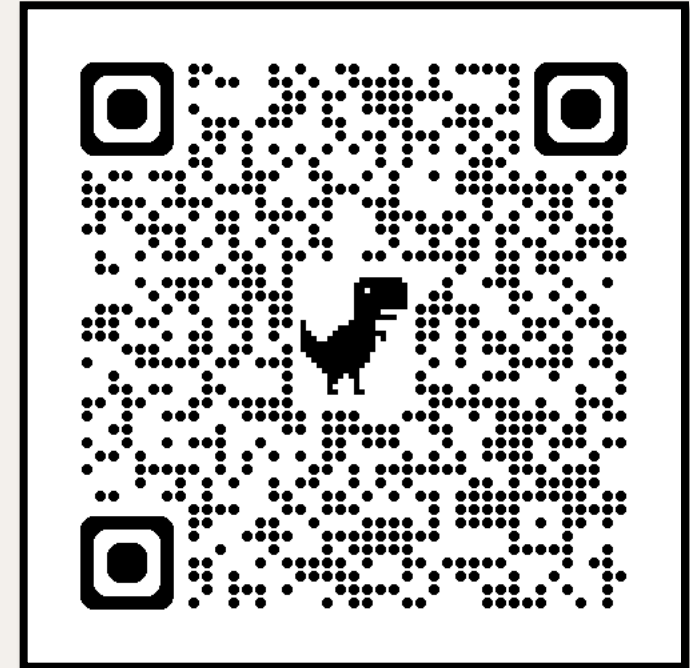
# How to create a Newsletter Announcement

15

This is what the post and email will look like. If you want to modify it, click the "Back to Edit" button, otherwise click "Next: Publish"



The screenshot shows a newsletter announcement email template. At the top, it says "Logos No. 861" and "Grand Lodge Of California, F & AM". The main body of the email is a white box with the following text: "Dear Brethren, You are cordially invited to attend the **Master Mason Degree** for **Brother John J. Newmember** on **Monday, March 17, 2025**, at **Freemasons Hall in the California Masonic Memorial Temple**. The **Special Meeting** will open at **6:30 PM**, with the **degree commencing immediately thereafter**. Following the ceremony, we will gather for a **Festive Board at 8:15 PM** to celebrate our newly raised Master Mason. **Attire for the evening is an evening suit (tuxedo)**. Please RSVP with our Secretary, **Brother Travis**, no later than **March 1, 2025**. We look forward to seeing you for this important occasion!" Below the text is the "Masons of California" logo. At the bottom of the email body, it says "You are receiving this email because you are a member of a Lodge in the Grand Lodge of California." and "To unsubscribe from future emails, login to the member portal to update your Communication Preferences. Login to Member Portal". At the bottom left of the page, there are two buttons: "Next: Publish" (highlighted with a red circle) and "Back to Edit".



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# How to create a Newsletter Announcement

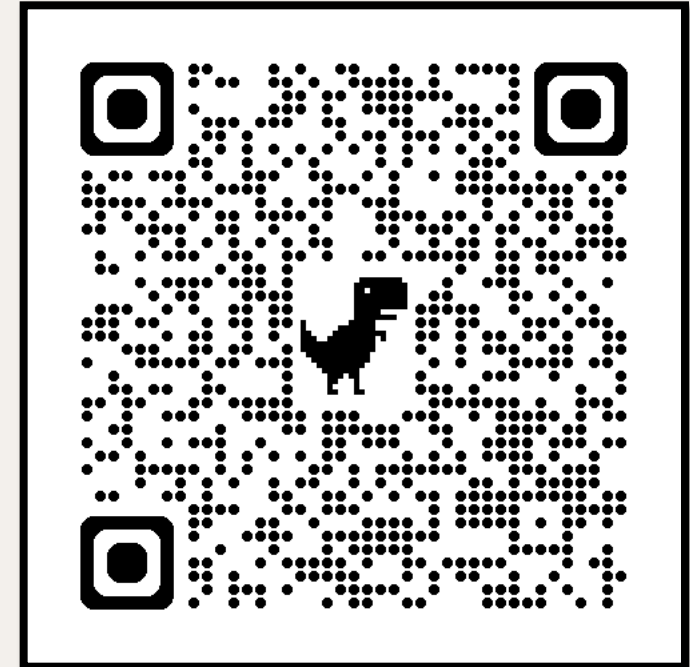
16 Choose your audience for the communication.

The screenshot shows a web interface for creating a newsletter. At the top, there's a navigation bar with icons for home, currency, users, folders, settings, and help. Below this is a section titled "Review the newsletter" with a sub-header "Before publishing Newsletter, you can preview and/or send a test email to make sure everything looks good." Two buttons are present: "Preview Newsletter" and "Send Test Email to mail@andrewctravis.com".

The main section is titled "Select Audiences" and includes a note: "You can add custom distribution lists under Engagement Dashboard -> Distribution Lists. Click on the name to download and verify the list of subscribers (EXCEL)." There are three sub-sections for selecting audiences:

- Select Audiences for Post Mail Communication**
  - Mailing List - Fellowcraft (3) Last updated 02/08/2023 @ 10:17AM
  - Mailing List - Master Mason (4) Last updated 02/08/2023 @ 10:17AM
  - Mailing List - Entered Apprentice (2) Last updated 02/08/2023 @ 10:17AM
  - Mailing List - Misc. Contacts (0) Last updated 02/08/2023 @ 10:17AM
- Select Audiences for Email Communication** (highlighted with an orange circle)
  - Email List - Entered Apprentice (1) Last updated 02/08/2023 @ 10:17AM
  - Email List - Master Mason (9) Last updated 02/08/2023 @ 10:17AM
  - Email List - Fellowcraft (4) Last updated 02/08/2023 @ 10:17AM
  - Email List - Misc. Contacts (3) Last updated 02/08/2023 @ 10:17AM
- Select Audiences for SMS Communication**
  - Text List - Fellowcraft (2) Last updated 02/08/2023 @ 10:17AM
  - Text List - Master Mason (7) Last updated 02/08/2023 @ 10:17AM
  - Text List - Entered Apprentice (0) Last updated 02/08/2023 @ 10:17AM
  - Text List - Misc. Contacts (0) Last updated 02/08/2023 @ 10:17AM

At the bottom left, there are links for "Back to Top ^" and "Expand Footer ^". At the bottom right, there is a "Publish Now" button.

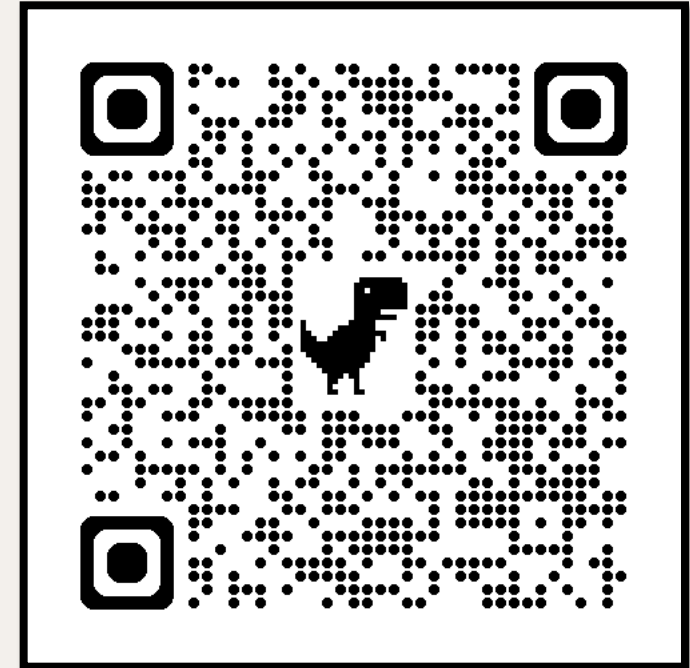


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# How to create a Newsletter Announcement

17

Click "Publish Now" for the post to go out by email, text, or generate PDFs for you to print, or "Publish Later: date and time" to set a specific date and time for the post to be circulated.



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**Build and share a survey**

# Build and Share a Survey



QUICK PULSE CHECKS



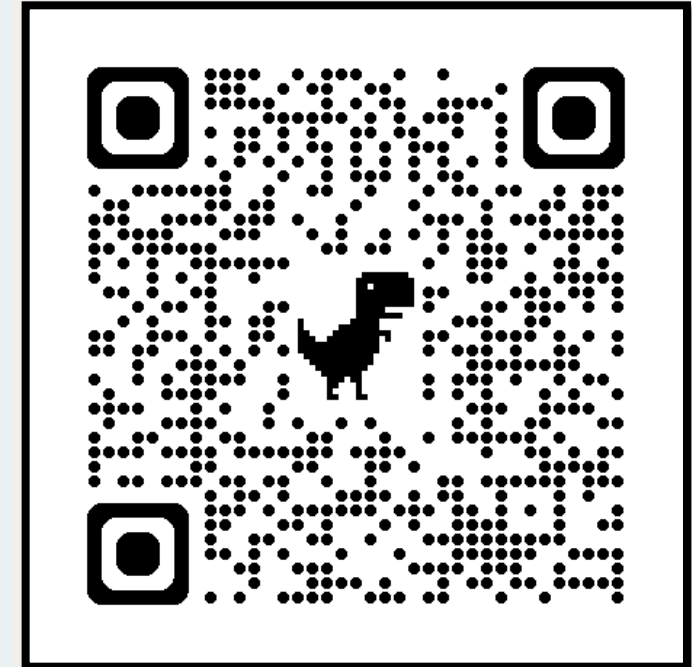
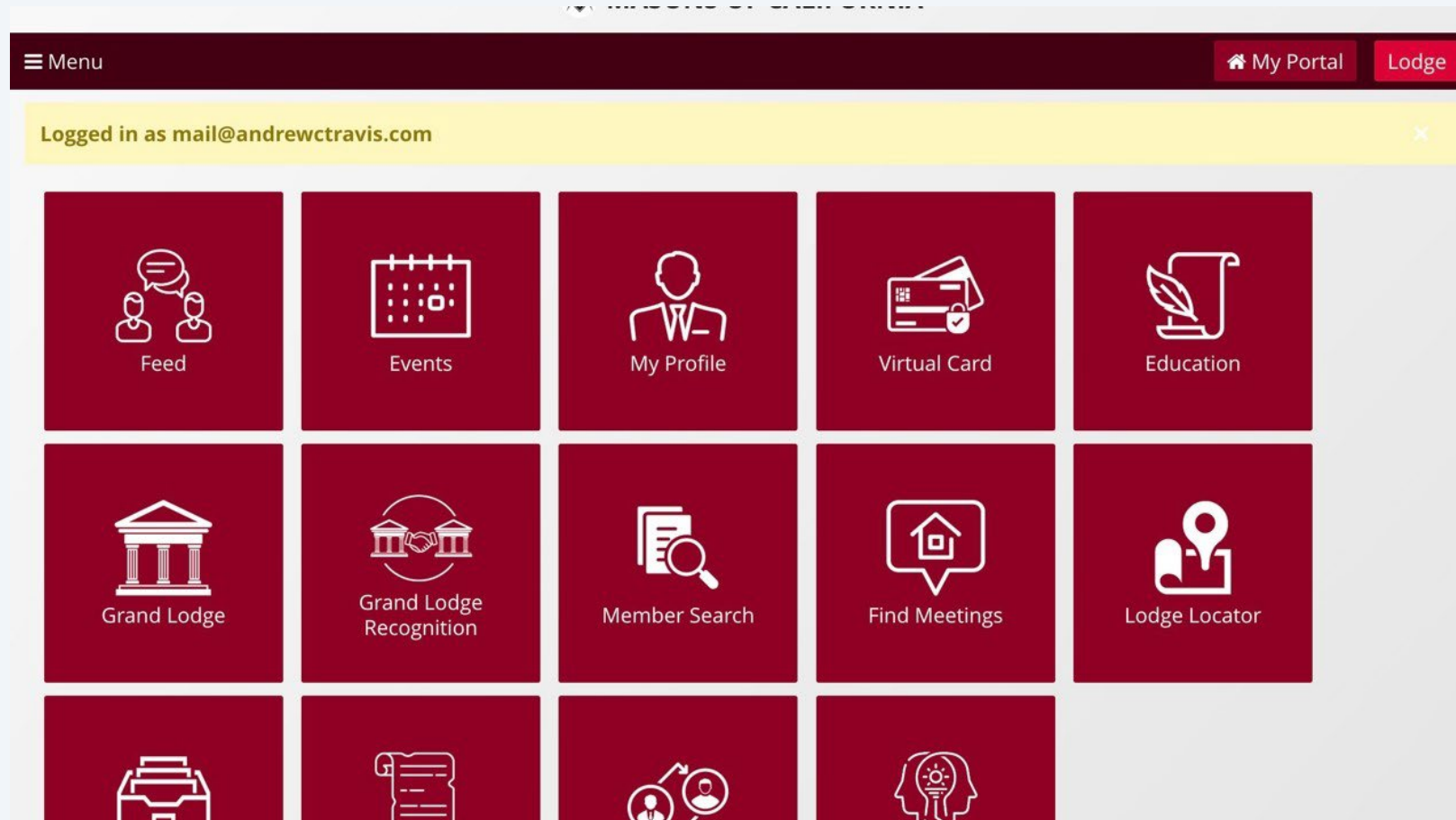
EVENT INTEREST



MEMBER NEEDS

# Build and share a Survey

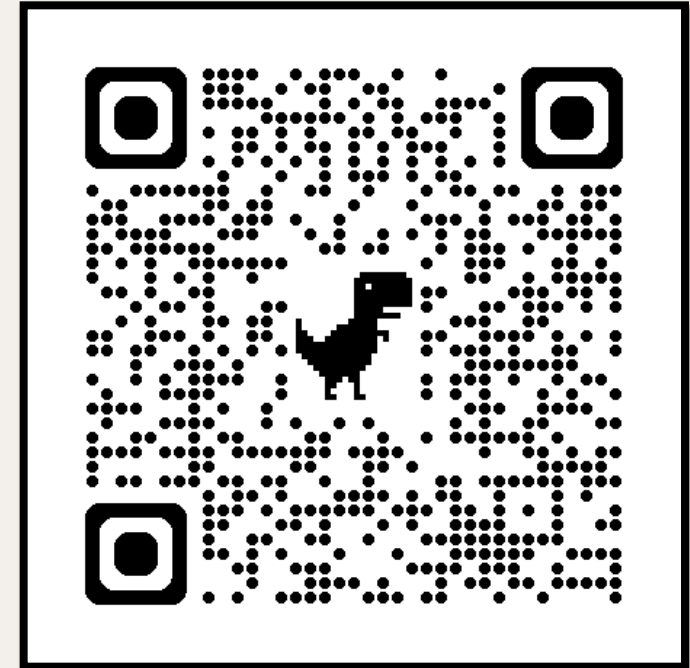
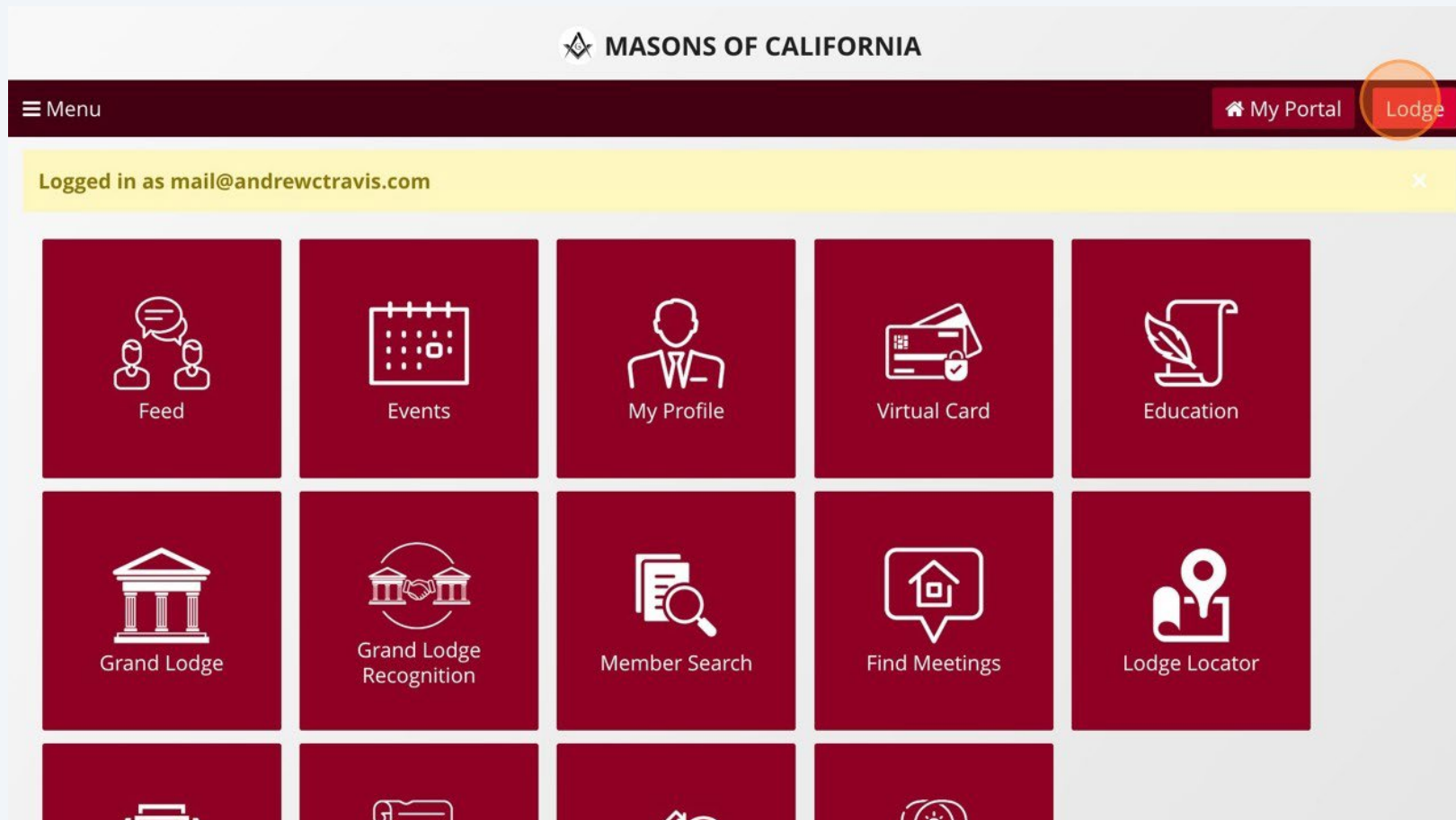
1 Navigate to <http://member.freemason.org> and login.



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# Build and share a Survey

2 To navigate to your lodge dashboard, click "Lodge"



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# Build and share a Survey

3

Click on the gears icon

The screenshot shows the 'Masons of California' dashboard. The top navigation bar includes the logo, 'Masons of California', and a 'Spoofing' button. The left sidebar contains a menu with 'LOGOS LODGE NO. 861' and various navigation options. The main content area is titled 'DASHBOARD' and features several data tables and charts. A red circle highlights the gear icon in the top navigation bar.

Tasks	Type	Due	Status
~ No tasks ~			

Member Workflows	Mem. Ct.
Prospect	20
Applicant	1

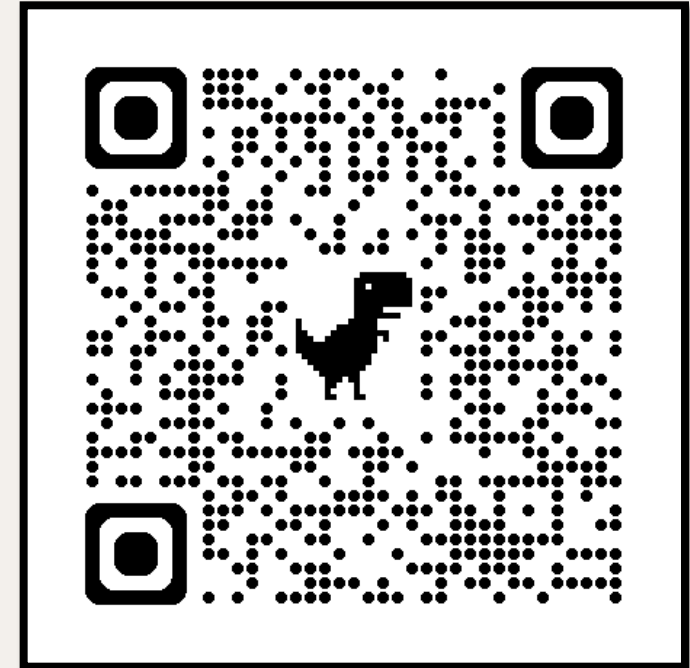
Member Pipeline	Mem. Ct.
Entered Apprentice	1
Master Mason	23

Recap 07/01/2023 to 06/30/2024	Mem Ct.
Total Gains	5

**Lodge Operations**  
Audit Report

**Dues Summary**

**Member Engagement**  
Tip: Click on chart to download an Excel report for each group.



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# Build and share a Survey

4 Click "Surveys"

**Date Chartered** 10/15/2017

**(Lat / Long)** (37.79 / -122.41)

**Tax Id#:** 813980086

**County:** San Francisco

**Street Address**  
1111 California St  
San Francisco , CA 94108-2252

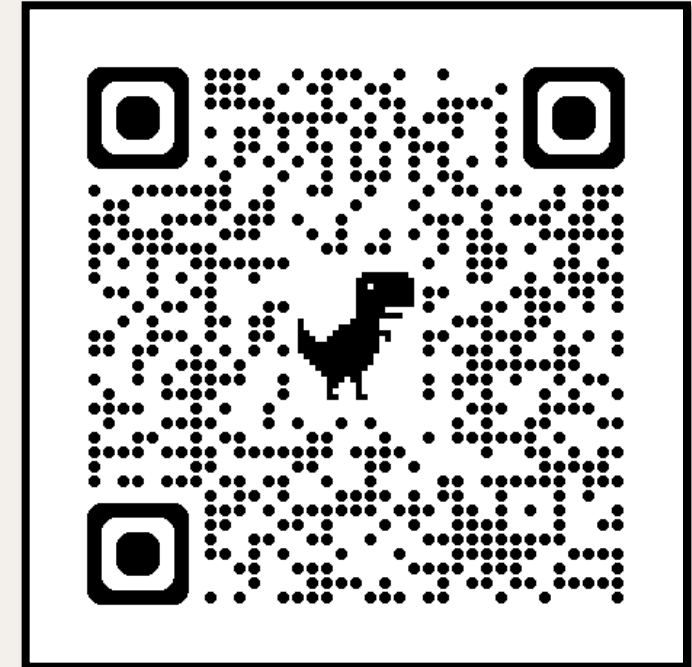
### Lodge Groupings

Type	Group	
District	District No. 145	<a href="#">View</a>
Division	Division No. 1	<a href="#">View</a>
Hall		

### Meeting Times

2nd Wed @ 6:30 PM  
Every month

**Awards** [Add](#)



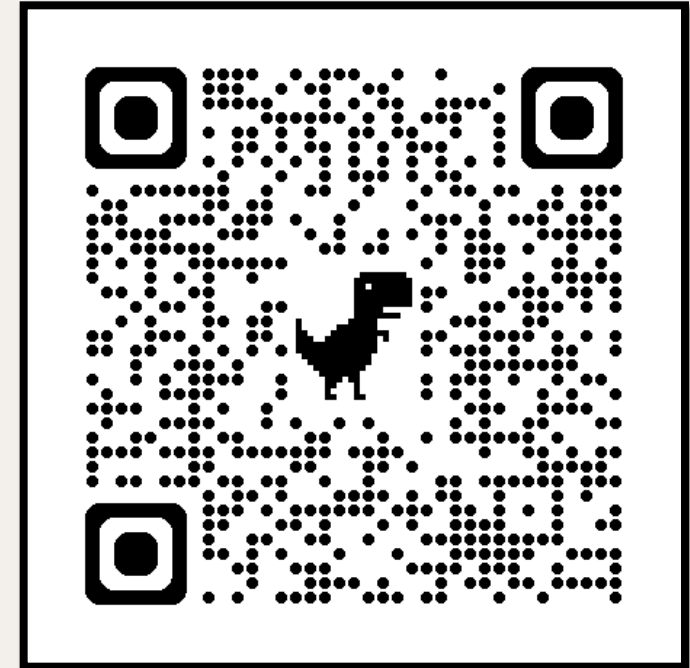
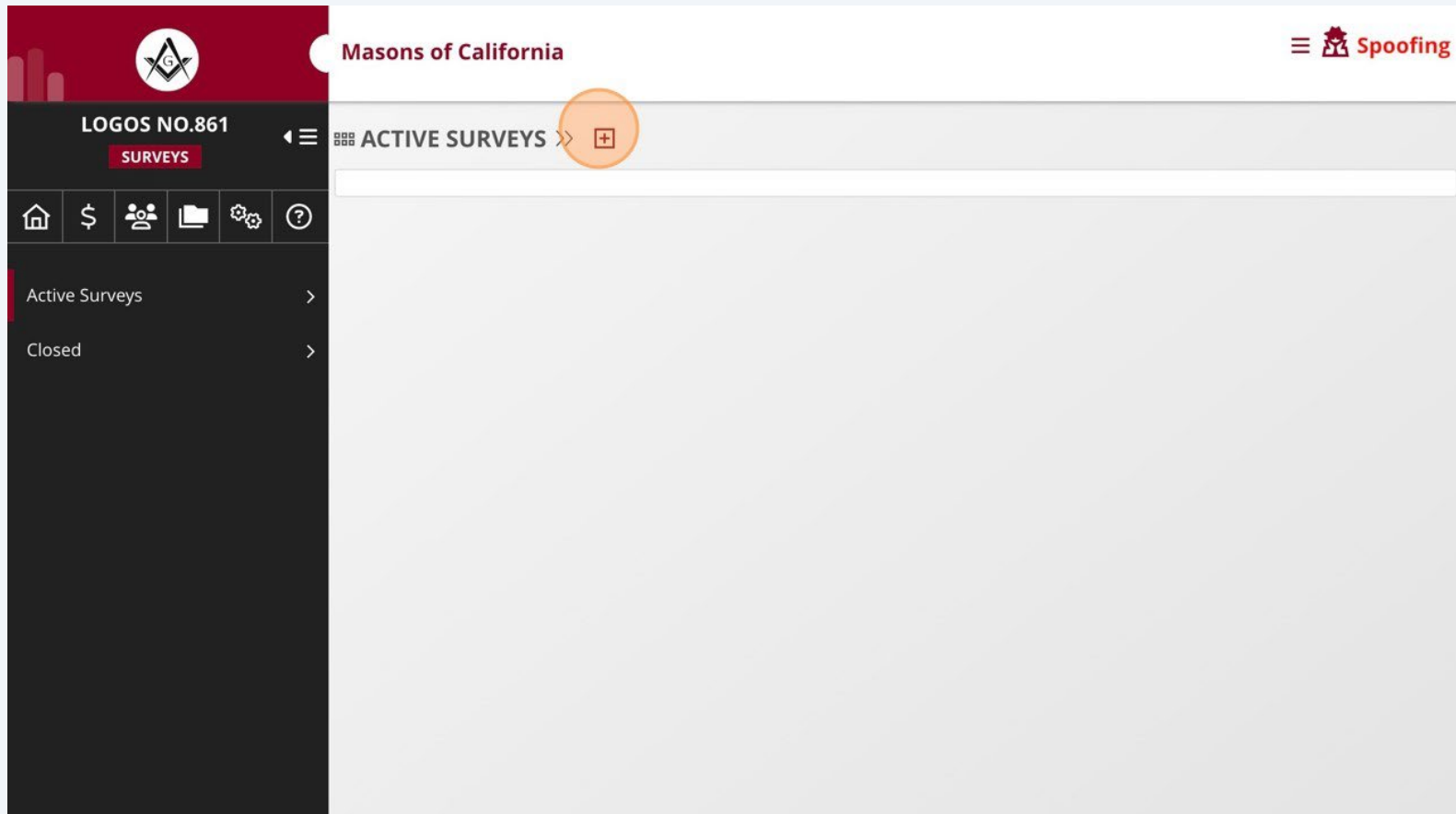
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# Build and share a Survey

5

Click the plus icon to create a new survey.



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# Build and share a Survey

6 Enter the survey title in the "\* Title" field.

LOGOS NO.861  
SURVEYS

Masons of California

☰ Spoofing

CREATING SURVEY >>

\* Title

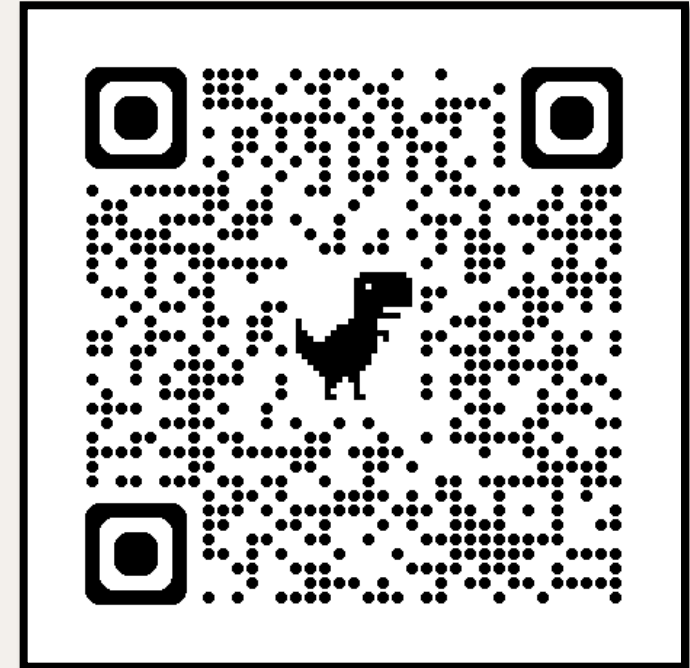
Description

\* Type  
Survey

Select member groups that can access this survey

- Master Mason
- Fellowcraft
- Entered Apprentice

\* Question



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# Build and share a Survey

7

Enter the description of the survey in the "Description" field.

Masons of California ≡ Spoofing

LOGOS NO.861 ≡ SURVEYS

CREATING SURVEY >>

\* Title  
Strengthening Our Lodge Experience

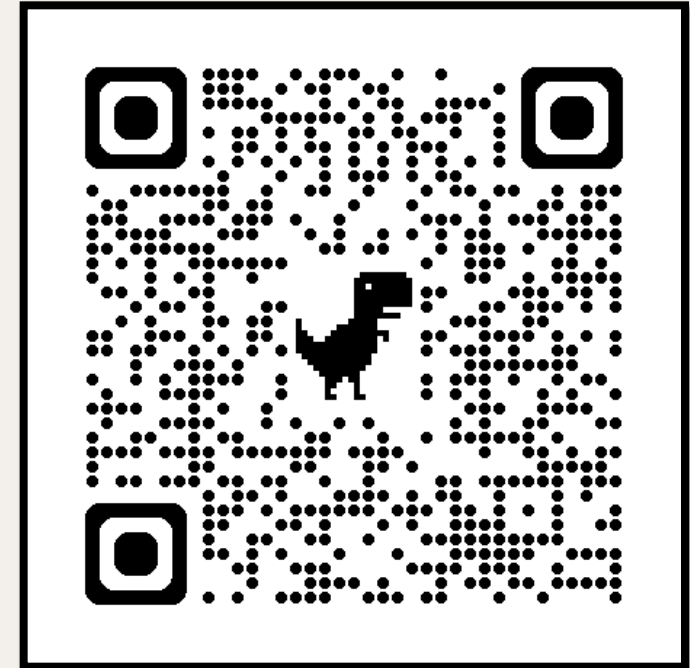
Description  
|

\* Type  
Survey ▾

Select member groups that can access this survey

- Master Mason
- Fellowcraft
- Entered Apprentice

\* Question

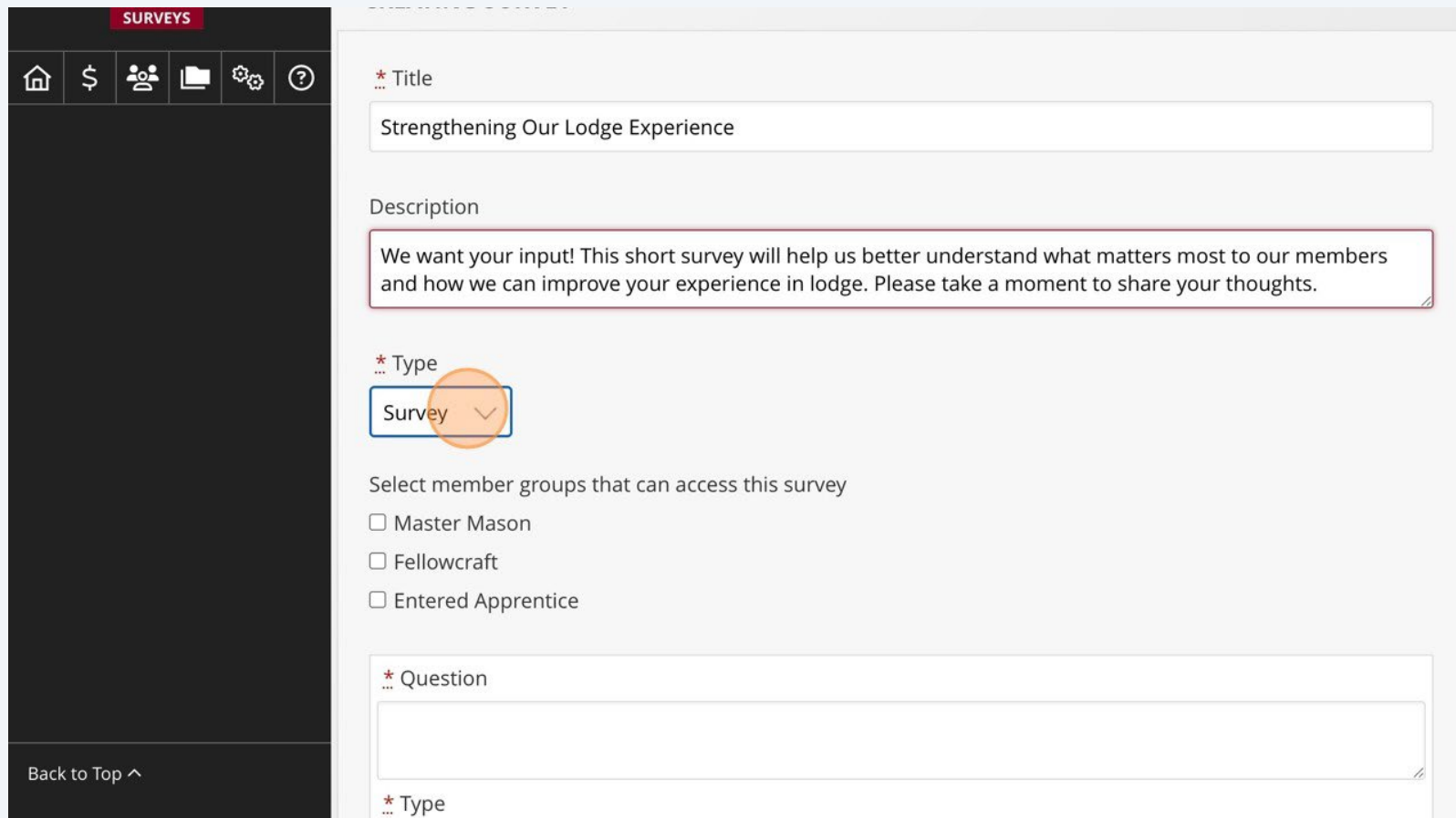


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# Build and share a Survey

8

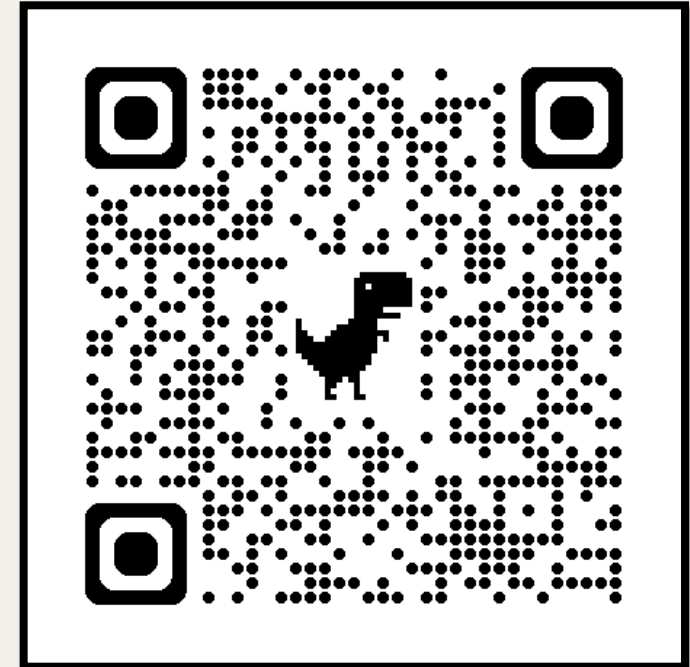
Click this dropdown to choose the type of survey (the options are survey, election and ballot).



The screenshot shows a web interface for creating a survey. On the left is a dark sidebar with a 'SURVEYS' header and icons for home, currency, users, folders, settings, and help. The main content area has a light background and contains the following fields:

- Title:** A text input field containing 'Strengthening Our Lodge Experience'.
- Description:** A text area containing 'We want your input! This short survey will help us better understand what matters most to our members and how we can improve your experience in lodge. Please take a moment to share your thoughts.'
- Type:** A dropdown menu with 'Survey' selected. This dropdown is highlighted with an orange circle.
- Select member groups that can access this survey:** Three checkboxes are listed: 'Master Mason', 'Fellowcraft', and 'Entered Apprentice', all of which are currently unchecked.
- Question:** A text input field for the survey question, which is currently empty.
- Type:** A second dropdown menu, partially visible at the bottom of the form.

At the bottom left of the sidebar, there is a 'Back to Top ^' link.

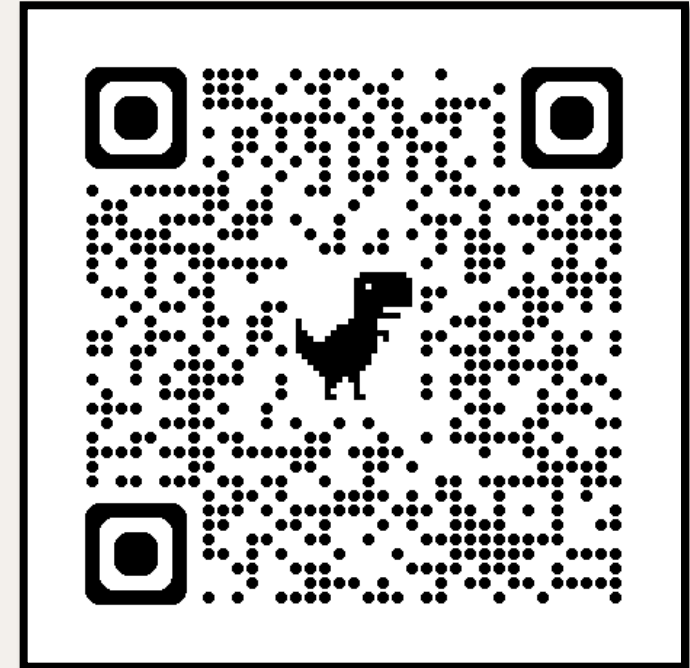


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# Build and share a Survey



Note that surveys cannot be used for the election of officers or for balloting on candidates.



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# Build and share a Survey

9 Select the member groups for which the survey is intended.

\* Title  
Strengthening Our Lodge Experience

Description  
We want your input! This short survey will help us better understand what matters most to our members and how we can improve your experience in lodge. Please take a moment to share your thoughts.

\* Type  
Survey

Select member groups that can access this survey

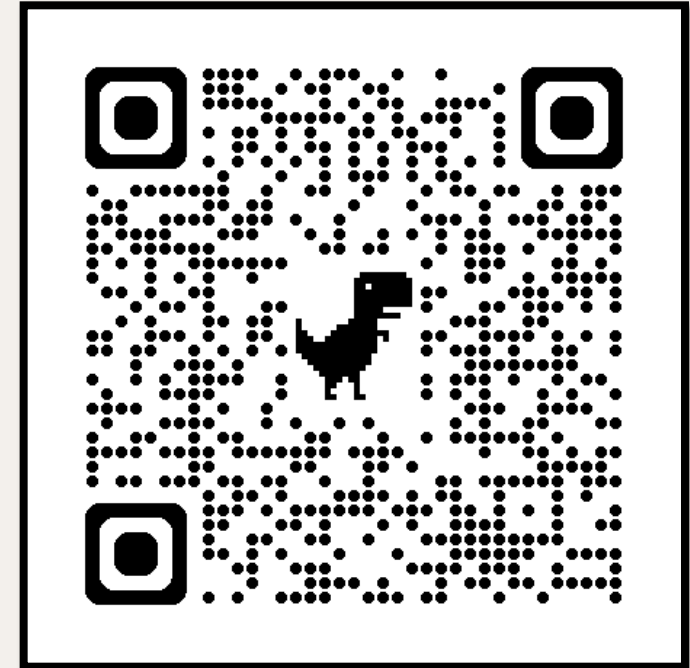
Master Mason

Fellowcraft

Entered Apprentice

\* Question

\* Type  
Drop down select with option to allow submitter to type in their own answer



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# Build and share a Survey

10

Enter the question in the "\* Question" field.

and how we can improve your experience in lodge. Please take a moment to share your thoughts.

\* Type  
Survey

Select member groups that can access this survey

- Master Mason
- Fellowcraft
- Entered Apprentice

\* Question

\* Type  
Drop down select with option to allow submitter to type in their own answer

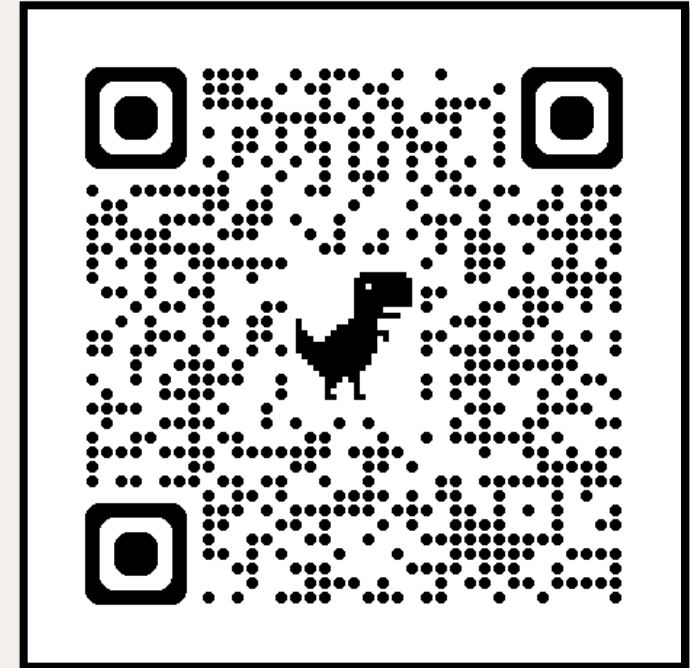
**Options**

Option

+ Add Option

Back to Top ^

Expand Footer ^



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# Build and share a Survey

- Select the question type from this drop down (the options are drop down select with option to allow submitter to type in their own answer, regular drop down select, radio buttons, and check boxes)

and how we can improve your experience in lodge. Please take a moment to share your thoughts.

\* Type  
Survey

Select member groups that can access this survey

- Master Mason
- Fellowcraft
- Entered Apprentice

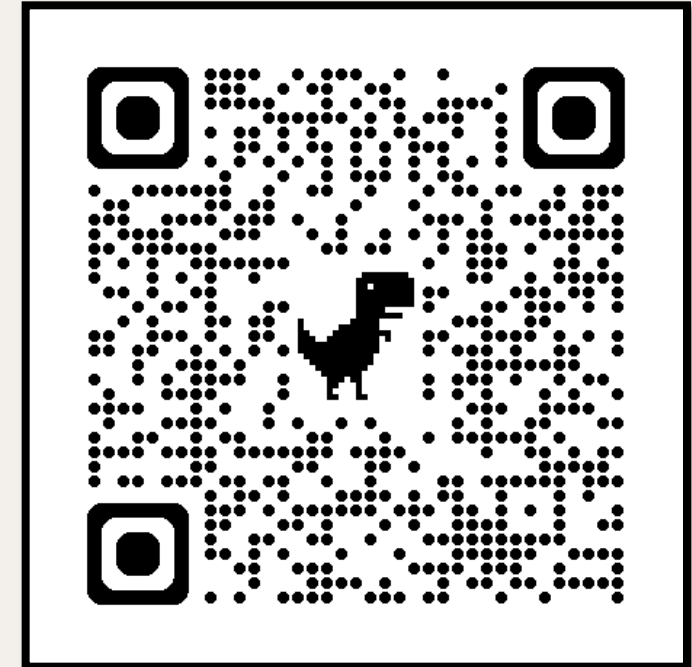
\* Question  
What types of lodge events are most valuable to you?

\* Type  
Check boxes

Options

Option

+ Add Option



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# Build and share a Survey

Enter any response options in the "Option" field.

and how we can improve your experience in lodge. Please take a moment to share your thoughts.

\* Type  
Survey

Select member groups that can access this survey

- Master Mason
- Fellowcraft
- Entered Apprentice

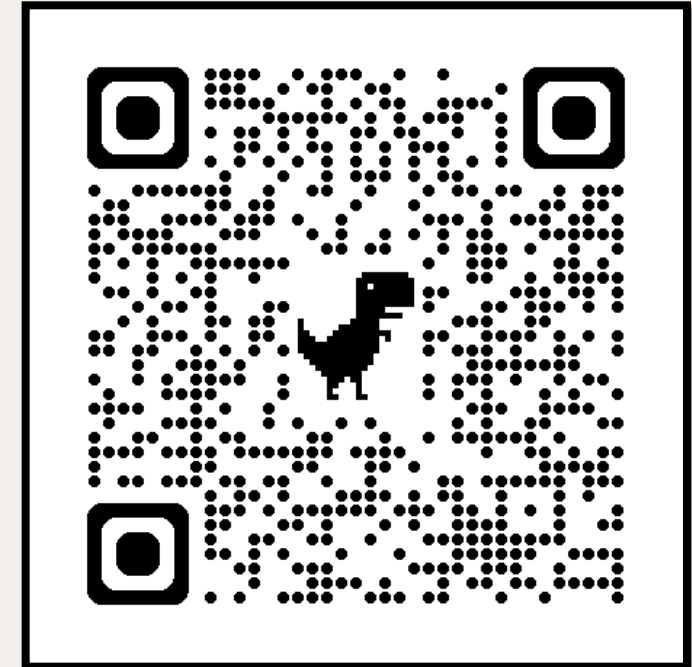
\* Question  
What types of lodge events are most valuable to you?

\* Type  
Check boxes

Options

Option

+ Add Option

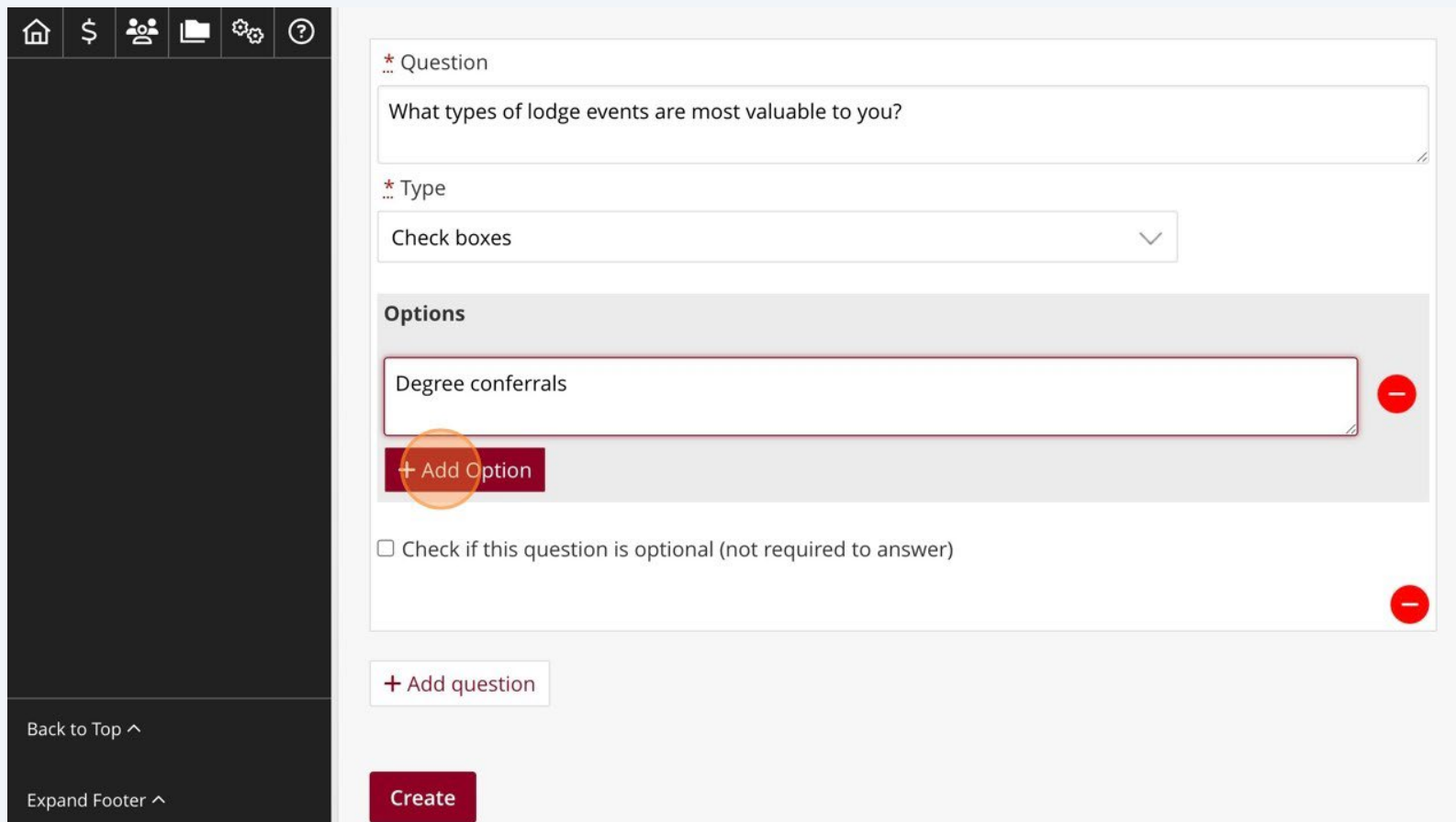


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# Build and share a Survey

13

Click "Add Option" to add on any other response options. Repeat as many times as you need for the options available.



\* Question

What types of lodge events are most valuable to you?

\* Type

Check boxes

Options

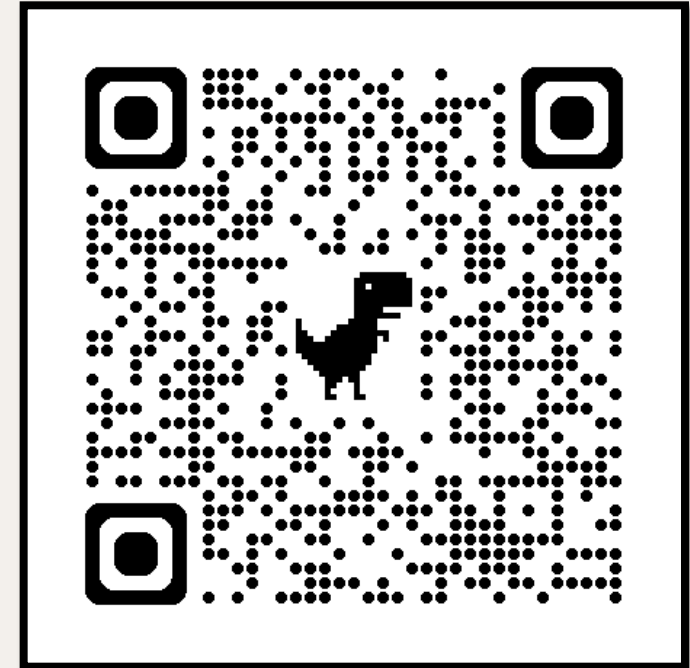
Degree conferrals

+ Add Option

Check if this question is optional (not required to answer)

+ Add question

Create



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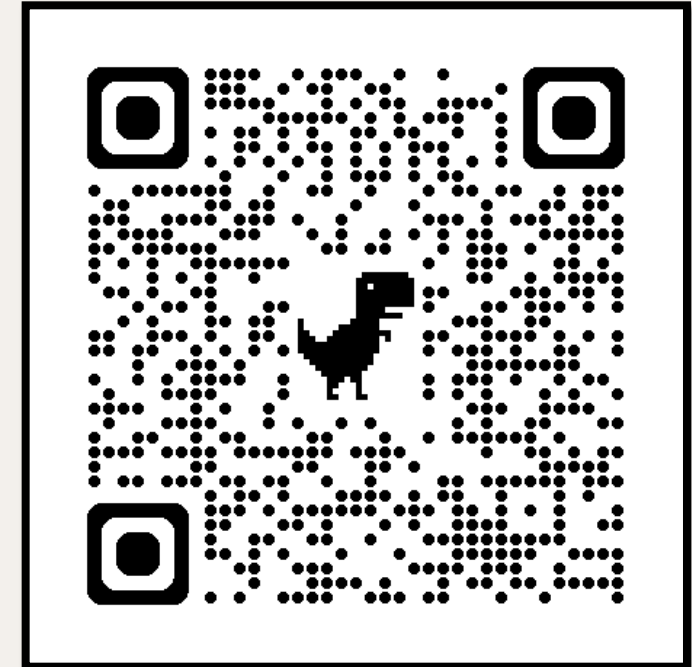


# Build and share a Survey

14

Click "Add question" to add a new question. Repeat as many times, adding options for response, for as many questions as needed.

The screenshot shows a survey builder interface. At the top, there is a navigation bar with icons for home, currency, users, folders, settings, and help. Below this is a list of options for a question, each with a red minus icon on the right for removal. The options are: "stated meetings with masonic education", "Fellowship events (e.g., dinners, BBQs)", "Community service activities", "Family-friendly gatherings", and "Other (please specify)". Below the list is a "+ Add Option" button. At the bottom of the question editor, there is a checkbox labeled "Check if this question is optional (not required to answer)" and a red "+ Add question" button. A "Create" button is located at the bottom of the screen. The left sidebar contains "Back to Top ^" and "Expand Footer ^" links.



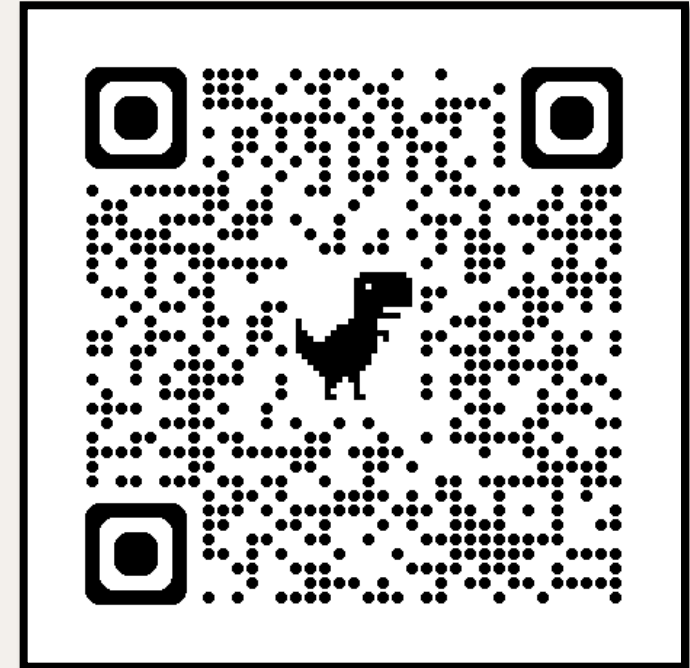
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# Build and share a Survey

15

Click the "Check if this question is optional (not required to answer)" field. for any non-required questions.

The screenshot shows a survey builder interface. At the top, there is a navigation bar with icons for home, currency, users, folders, settings, and help. Below this is a dark sidebar with 'Back to Top' and 'Expand Footer' links. The main content area shows a question type dropdown set to 'Drop down select with option to allow submitter to type in their own answer'. Underneath is a list of options: 'More mentoring', 'More education', 'More social time', 'More outreach to absent members', and 'More ritual work'. Each option has a red minus sign to its right. Below the list is a '+ Add Option' button. At the bottom of the question configuration, there is a checkbox labeled 'Check if this question is optional (not required to answer)', which is highlighted with an orange circle. A red minus sign is also visible at the bottom right of the question configuration area.



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# Build and share a Survey

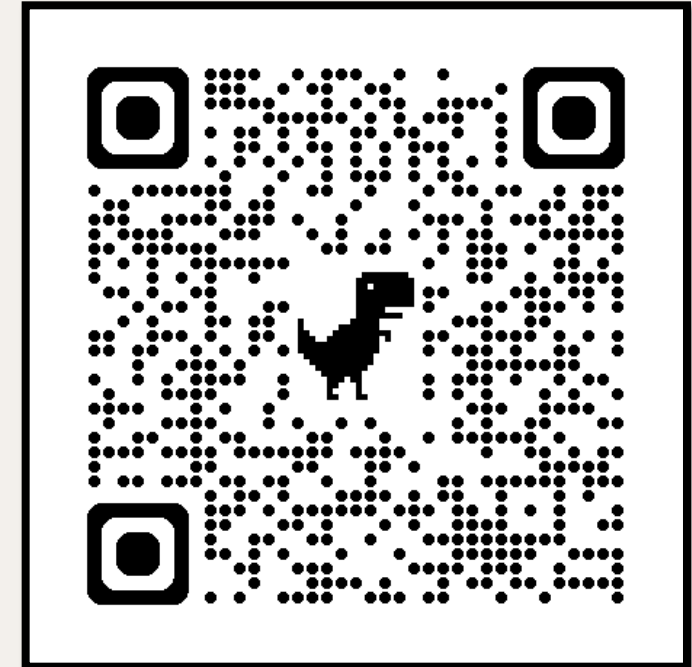
16

Click the "Create" to create the survey.

The screenshot shows a survey creation interface. On the left is a dark sidebar with navigation icons: a home icon, a dollar sign, a group of people, a folder, a gear, and a question mark. Below the icons are the links "Back to Top ^" and "Expand Footer ^". The main content area displays a list of survey options, each in a white box with a red minus sign on the right:

- more mentoring
- More education
- More social time
- More outreach to absent members
- More ritual work

Below the list is a "+ Add Option" button. Underneath that is a checkbox labeled "Check if this question is optional (not required to answer)" which is checked. At the bottom of the main area is a "+ Add question" button. A prominent red "Create" button is located at the bottom center of the interface.



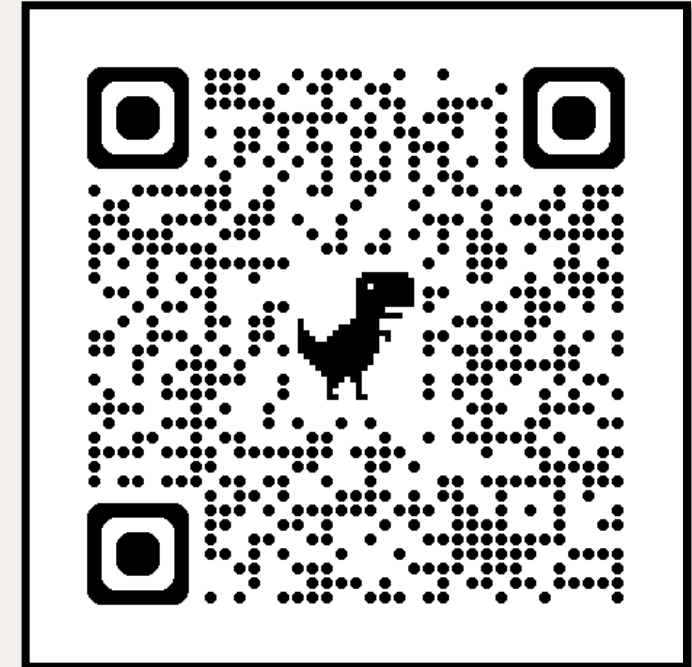
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# Build and share a Survey

17

Click "Copy Link to Take Survey" to get a sharable URL which you can give to members.

The screenshot shows the 'Masons of California' survey management dashboard. The header includes the organization name and a 'Spoofing' indicator. The main content area is titled 'SURVEYS >> STRENGTHENING OUR LODGE EXPERIENCE' and displays 'Results' with a message: '~ No submitted entries found ~'. On the right, a 'Survey Status: Active' box contains several action buttons: 'Close Survey', 'Distribute As Newsletter', 'Copy Link to Take Survey' (highlighted with a red circle), 'Print Results', and 'Delete Survey'. A 'Notes' section is visible at the bottom right. The left sidebar shows navigation options: 'LOGOS NO.861', 'SURVEYS', and a menu with 'Results', 'Survey Details', 'Questions', 'Audiences', and 'Reports'.



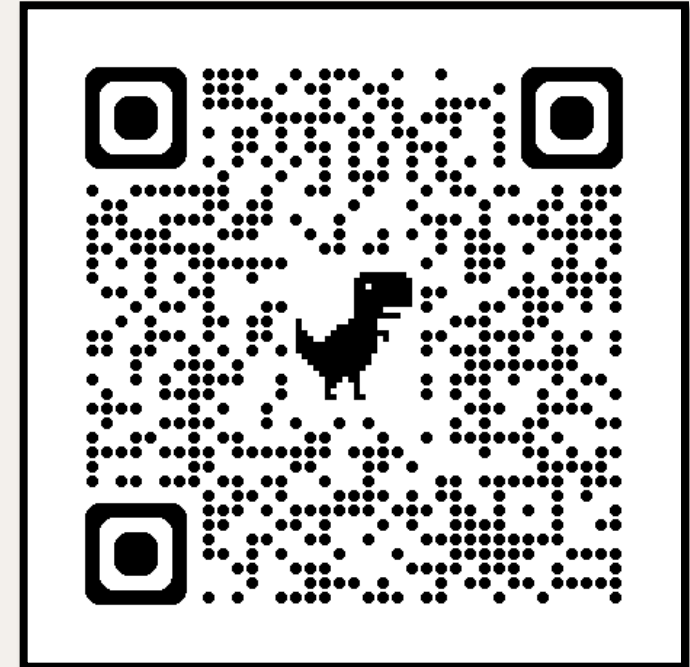
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# Build and share a Survey



Click "Distribute As Newsletter" to send the survey out via email.

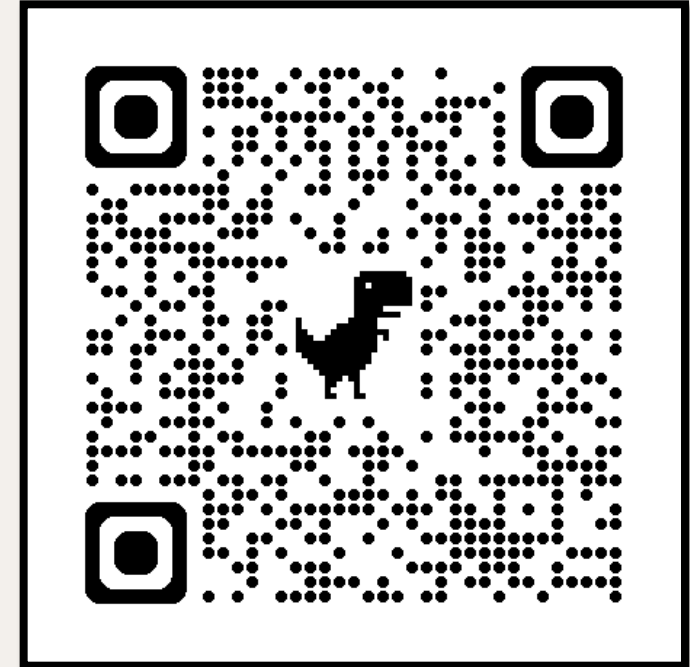
The screenshot shows a web interface for managing surveys. At the top, it says "Masons of California" and "Spoofing". The main header includes "LOGOS NO.861" and "SURVEYS". The current survey is titled "STRENGTHENING OUR LODGE EXPERIENCE". The "Results" section shows "No submitted entries found". A modal window titled "Distribute Survey as Newsletter" is open, with a text input field containing "Survey: Strengthening Our Lodge Experience" and a "Next: Edit newsletter content" button. On the right, a "Survey Status: Active" panel contains buttons for "Close Survey", "Distribute As Newsletter" (highlighted with an orange circle), "Copy Link to Take Survey", "Print Results", and "Delete Survey". A "Notes" section is visible at the bottom right.



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# Build and share a Survey

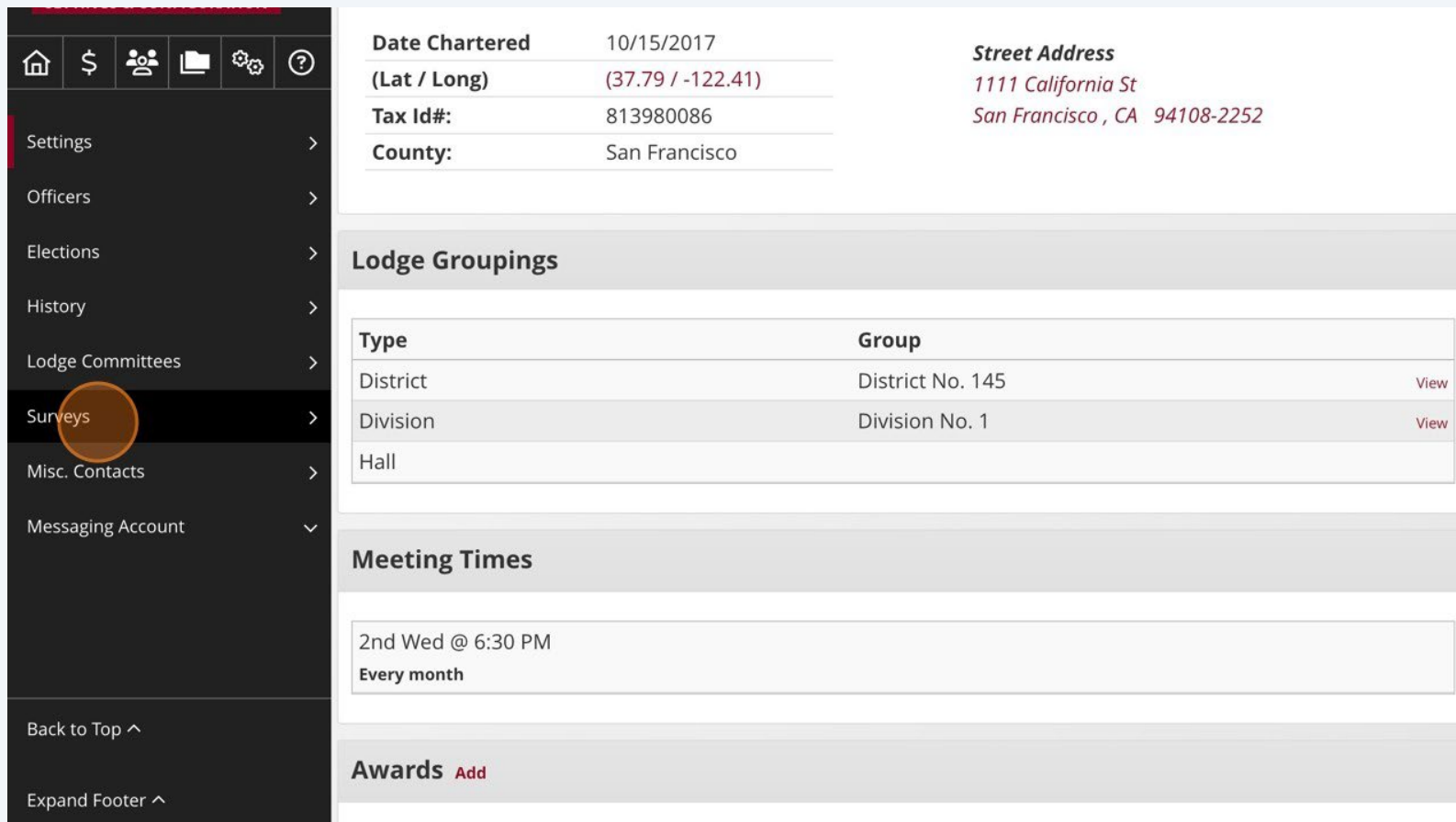
FOLLOW INSTRUCTIONS FOR  
POSTING A NEWSLETTER ANNOUNCEMENT



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# Build and share a Survey

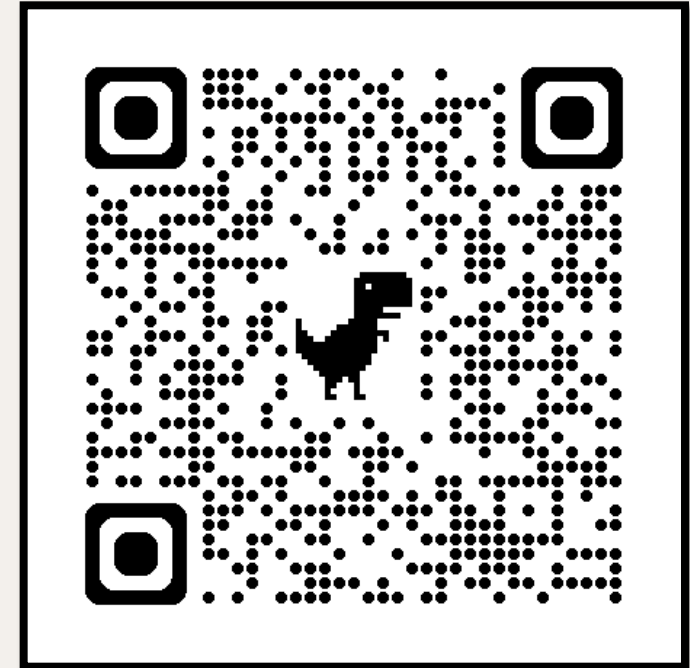
25 Click "Surveys"



The screenshot shows a web application interface. On the left is a dark sidebar menu with icons for home, currency, users, folders, settings, and help. The 'Surveys' menu item is highlighted with a brown circle. The main content area is white and contains several sections:

- Date Chartered:** 10/15/2017
- (Lat / Long):** (37.79 / -122.41)
- Tax Id#:** 813980086
- County:** San Francisco
- Street Address:** 1111 California St, San Francisco, CA 94108-2252
- Lodge Groupings:** A table with columns 'Type' and 'Group'.

Type	Group
District	District No. 145 <a href="#">View</a>
Division	Division No. 1 <a href="#">View</a>
Hall	
- Meeting Times:** 2nd Wed @ 6:30 PM, Every month
- Awards:** Add



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# Build and share a Survey

26

Click "Manage" next to the survey you wish to manage.

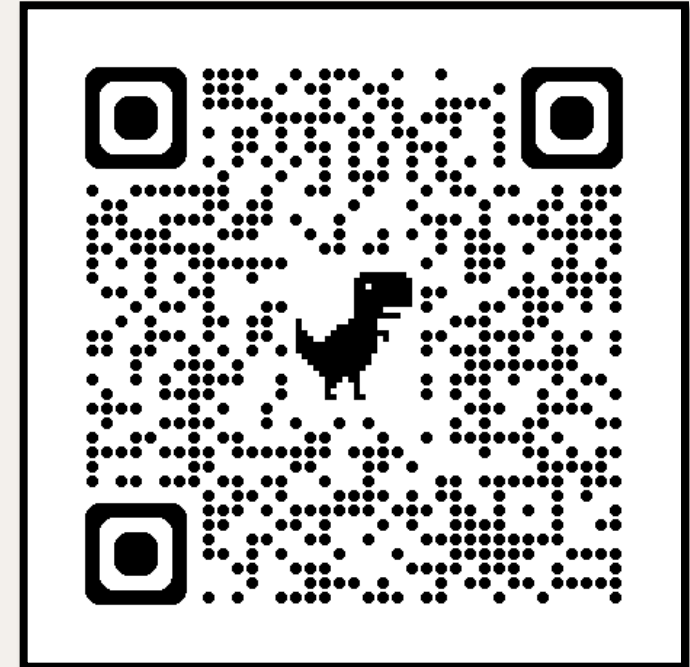
Masons of California

LOGOS NO.861

SURVEYS

ACTIVE SURVEYS >> +

Survey	Type	Created On	Responses	Actions
Strengthening Our Lodge Experience	Survey	03/25/2025	0	Manage



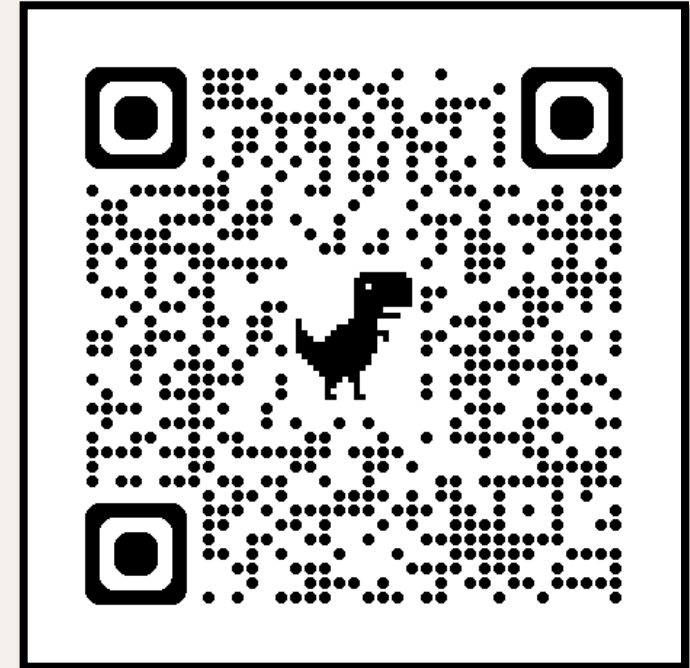
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# Build and share a Survey

27

Click "Print Results" will download a PDF of the results to your computer. Note that in this example the survey had not yet run, but otherwise results would show in the results area of the page.

The screenshot shows a web interface for 'LOGOS NO.861 SURVEYS'. The main heading is 'SURVEYS >> STRENGTHENING OUR LODGE EXPERIENCE'. Below this, there is a 'Results' section with the text '~ No submitted entries found ~'. To the right of the results, there is a 'Survey Status: Active' section with several buttons: 'Close Survey', 'Distribute As Newsletter', 'Copy Link to Take Survey', 'Print Results' (highlighted with an orange circle), and 'Delete Survey'. At the bottom right, there is a 'Notes' section with a text input field.



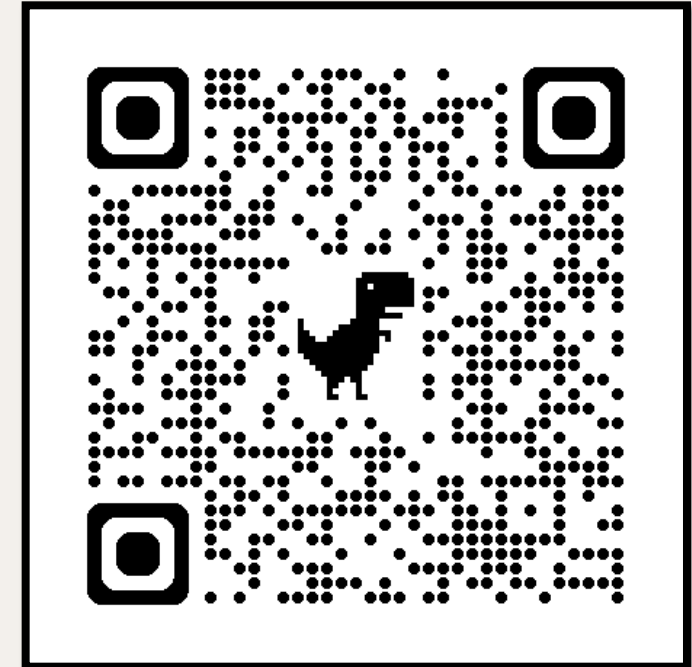
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# Build and share a Survey

28

Click "Close Survey" when you are ready to close the survey from accepting new responses.

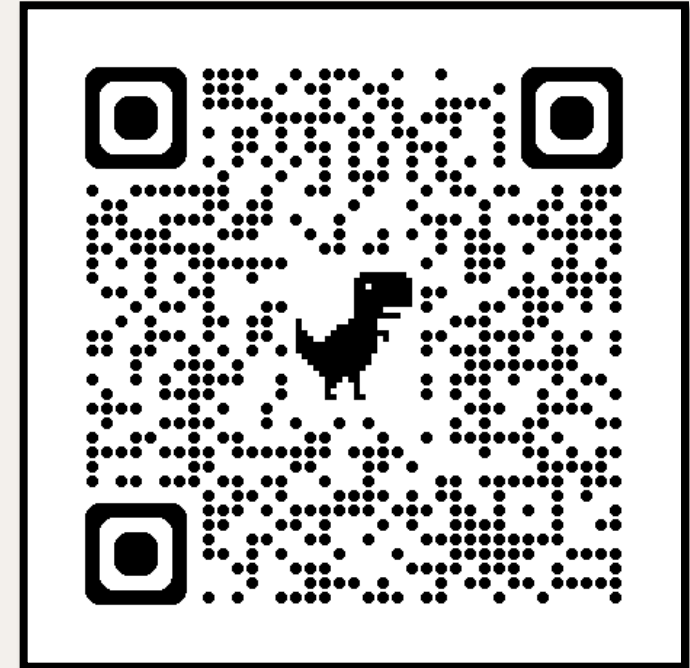
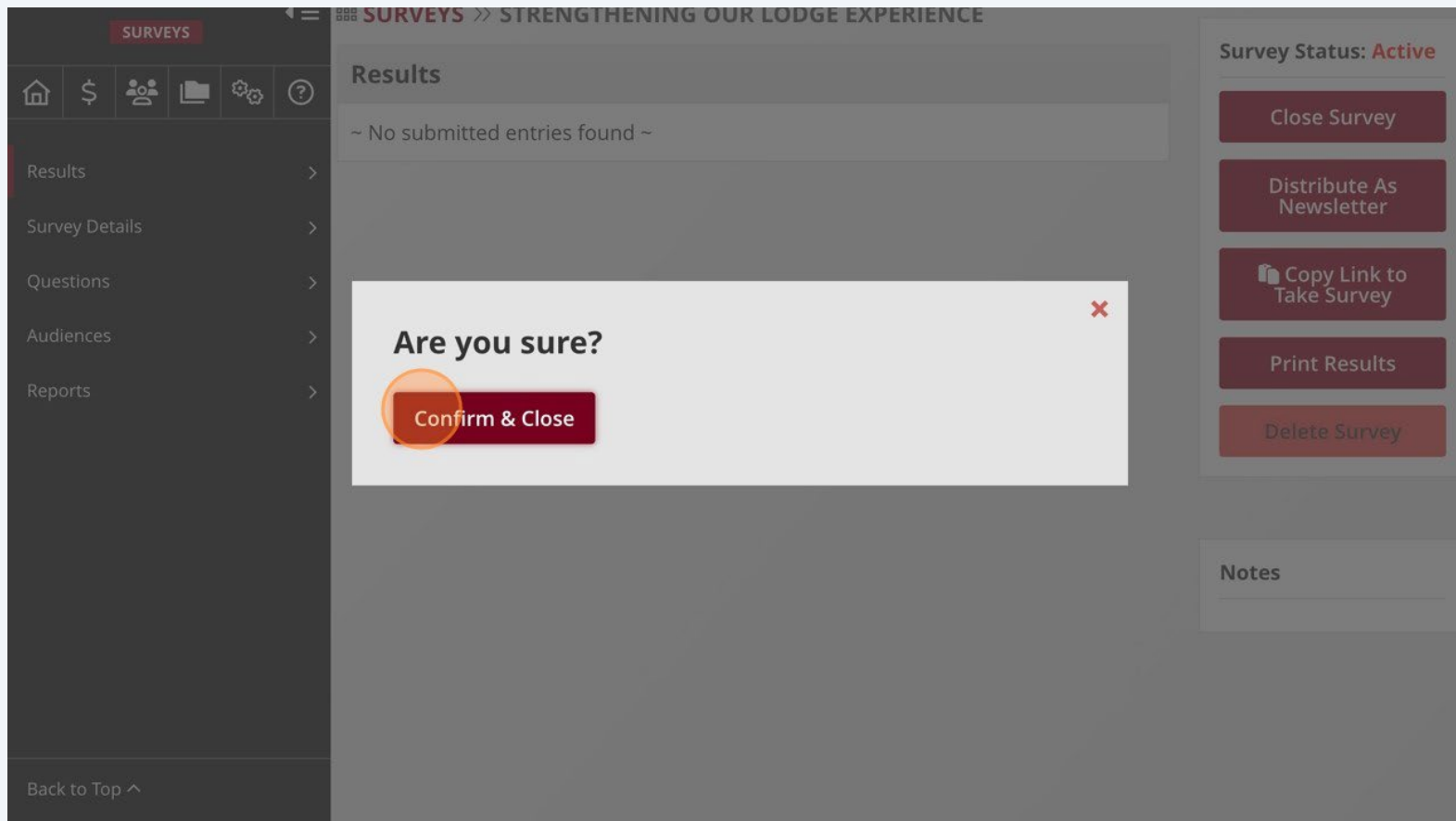
The screenshot shows the Masons of California survey management interface. At the top, it says "Masons of California" and "Spoofing". Below that, it says "LOGOS NO.861" and "SURVEYS". The main heading is "SURVEYS >> STRENGTHENING OUR LODGE EXPERIENCE". Under "Results", it says "~ No submitted entries found ~". On the right, there is a "Survey Status: Active" section with buttons for "Close Survey", "Distribute As Newsletter", "Copy Link to Take Survey", and "Delete Survey". At the bottom, there is a "Notes" section.



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# Build and share a Survey

29 Click this button.



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**Store and share files in the  
Vault**

# Store and Share Files in the Vault

Bylaws,  
minutes,  
resolutions.

Safe,  
accessible,  
and organized.

# Store and Share Files in the Vault

1

Navigate to

<http://member.freemason.org>

and login.



**Lodge: Logos No. 861**

Status: Active

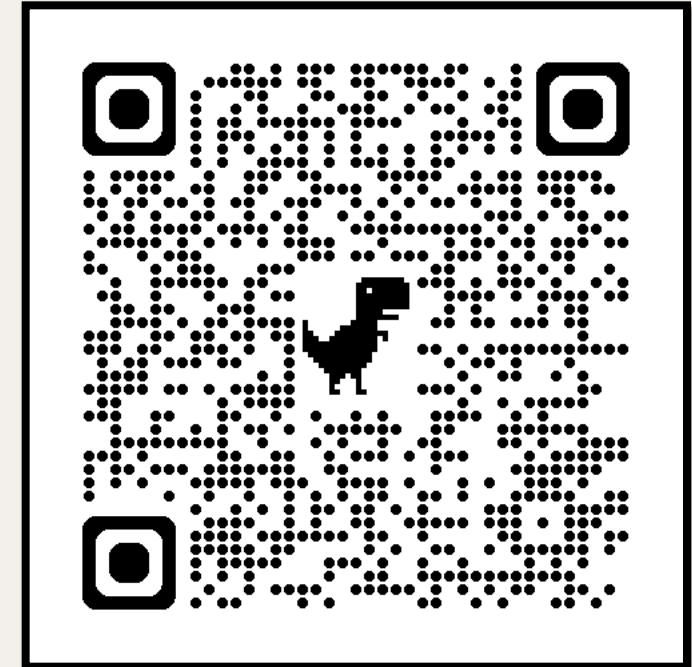
**\$0.00**

No Balance Due

...  
Actions

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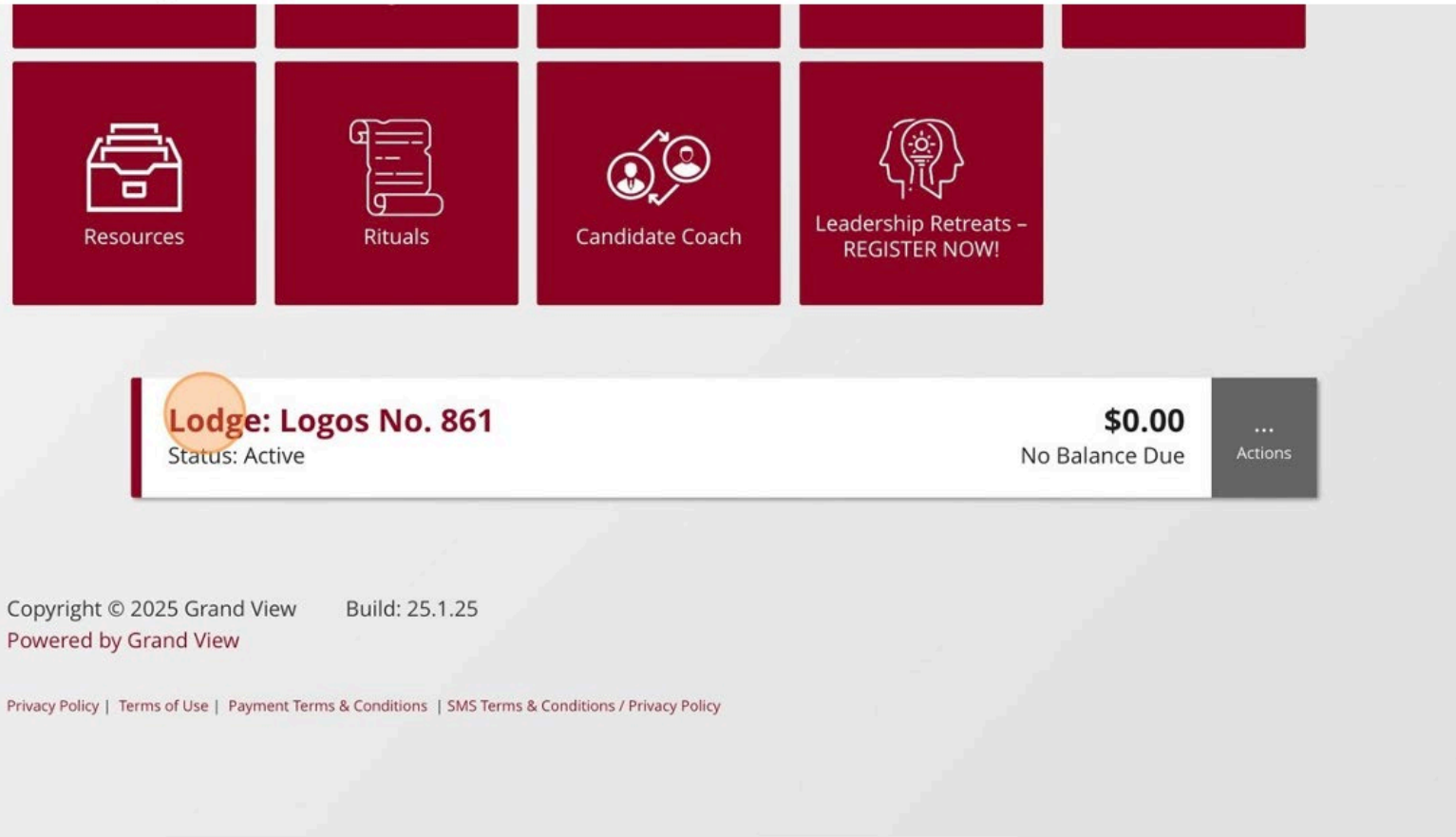


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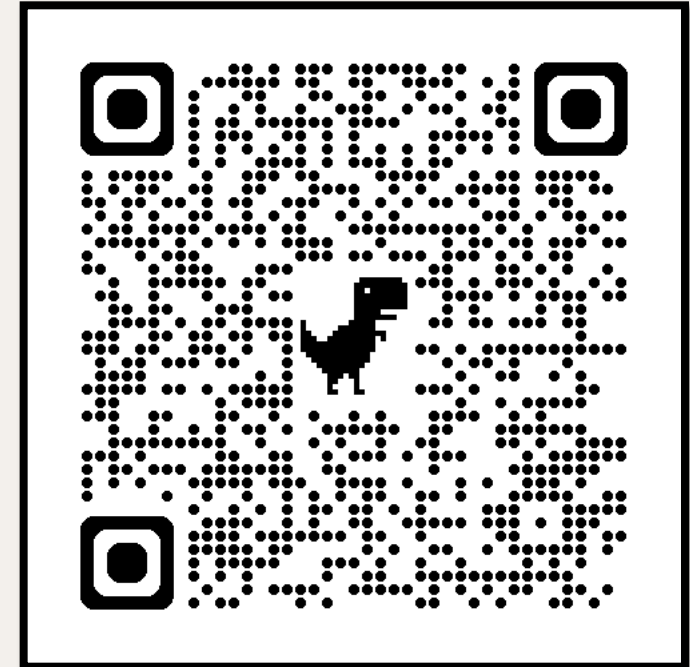


# Store and Share Files in the Vault

2 Click on your lodge name.



The screenshot displays a user interface with a dark red header and a grid of four red navigation buttons: 'Resources' (with a folder icon), 'Rituals' (with a scroll icon), 'Candidate Coach' (with a person and arrow icon), and 'Leadership Retreats - REGISTER NOW!' (with a lightbulb icon). Below the grid is a white bar containing lodge details: 'Lodge: Logos No. 861' (with an orange circle icon) and 'Status: Active' on the left; '\$0.00' and 'No Balance Due' in the center; and a grey 'Actions' button with three dots on the right. At the bottom left, it shows 'Copyright © 2025 Grand View Build: 25.1.25 Powered by Grand View' and a row of links: 'Privacy Policy | Terms of Use | Payment Terms & Conditions | SMS Terms & Conditions / Privacy Policy'.



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# Store and Share Files in the Vault



Click "File Vault." This is how members who do not have lodge dashboard access can see the files in their lodge's vault.

MASONS OF CALIFORNIA

Menu

My Portal

Lodge

Logos No. 861 **File Vault**

Current Balance: \$0.00

Transaction History



Lodge Info



Lodge Roster

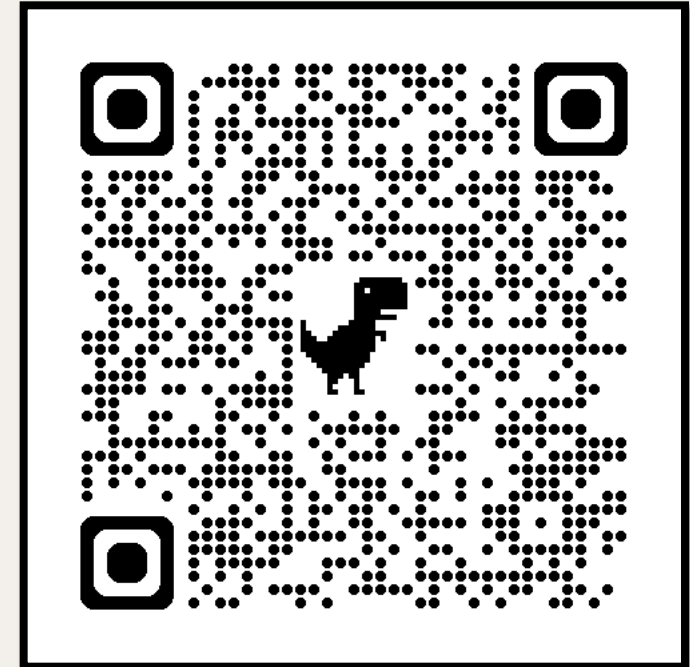


Logos No. 861's Feed

Create a post

Write something

Upcoming Events



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# Store and Share Files in the Vault

4 Click on a folder to expand it.

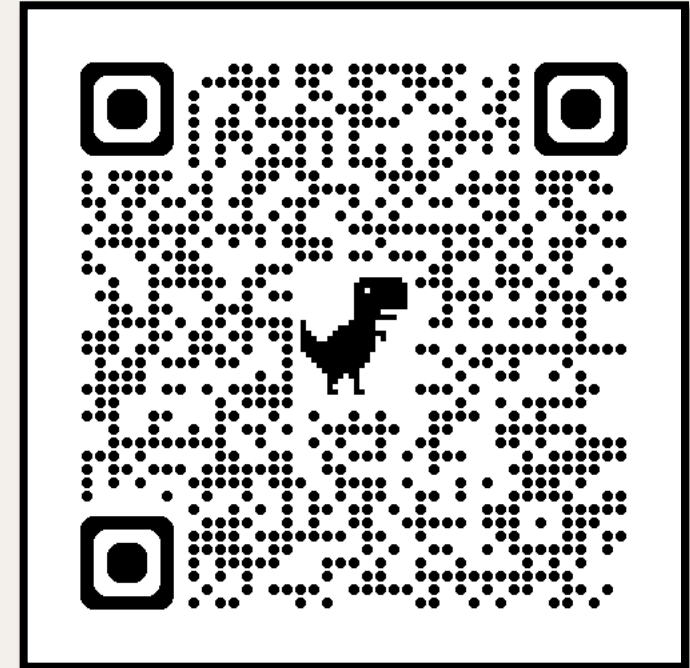
MASONS OF CALIFORNIA

Menu My Portal Lodge

## File Vault [Back](#)

- Logos No. 861
  - Agenda & Minutes
  - Artwork
  - Documents
  - Financial Reports
  - Secretary Reports
  - Tax
  - Website
  - Whistleblower Policy

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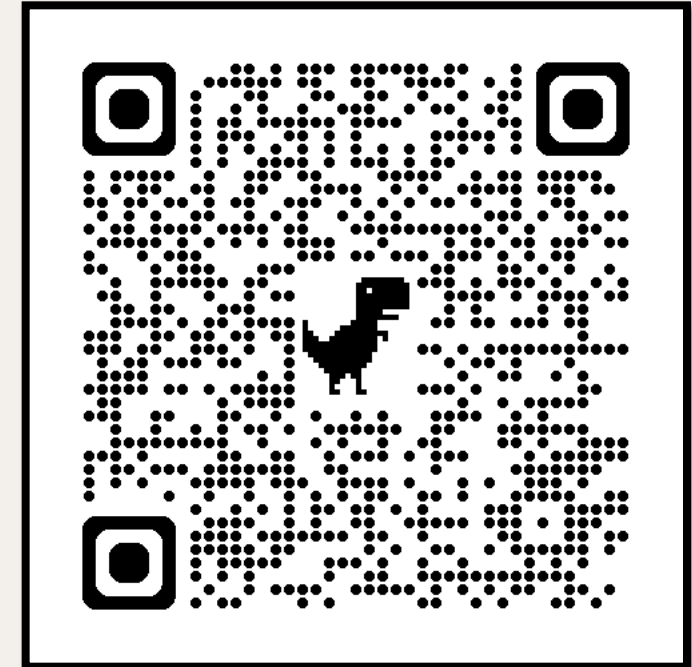
# Store and Share Files in the Vault

5

Click on a file name to download it.

For members wish lodge dashboard access, click the "Lodge" button.

The screenshot shows the 'File Vault' section of the Masons of California website. At the top, there is a navigation bar with the Masons of California logo and name, a 'Menu' button, a 'My Portal' button, and a 'Lodge' button. Below the navigation bar, the 'File Vault' section is titled, with a 'Back' link. The main content area displays a folder structure: 'Logos No. 861' contains a sub-folder 'Agenda & Minutes', which in turn contains a sub-folder '2019' and a sub-folder 'Artwork'. Under the '2019' folder, there is a list of PDF files representing meeting minutes, each with an 'Actions' button to its right. The files listed are: '2016.11 Stated Meeting - Minutes.pdf (26.6 KB)', '2016.12 Stated Meeting - Minutes.pdf (175 KB)', '2017.01 Stated Meeting - Minutes.pdf (120 KB)', '2017.02 Stated Meeting - Minutes.pdf (31.4 KB)', '2017.03 Stated Meeting - Minutes.pdf (26.9 KB)', '2017.04 Stated Meeting - Minutes.pdf (25.6 KB)', '2017.05 Stated Meeting - Minutes.pdf (24.5 KB)', and '2017.06 Stated Meeting - Minutes.pdf (31.1 KB)'. A partial entry for '2017.07 Stated Meeting - Minutes.pdf (187 KB)' is visible at the bottom.



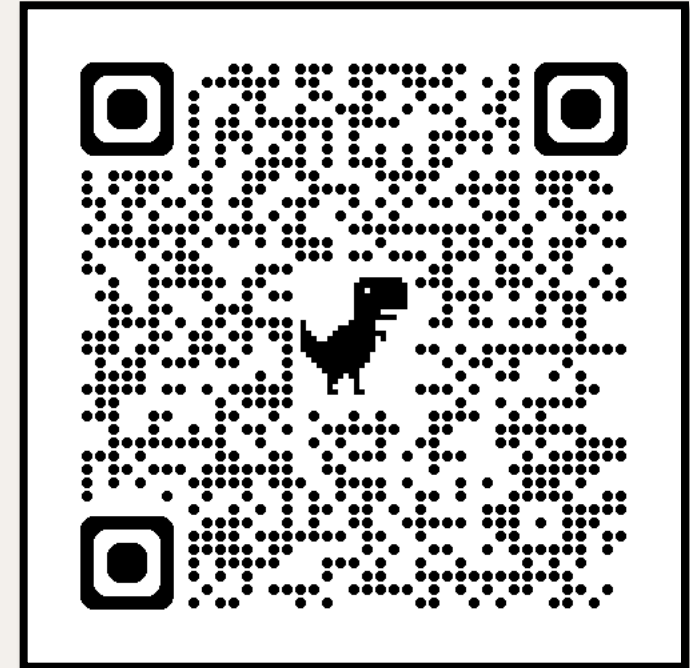
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# Store and Share Files in the Vault

6 Click the file icon.

The screenshot shows the LOGOS dashboard for Lodge No. 861. The navigation menu on the left includes: Dashboard, Members, Spouses/Widows, Other Contacts, Newsletters (formerly Posts), Meetings & Events, Reports & Labels, List Builder (formerly Report Builders), and Tasks. The file icon in the top navigation bar is highlighted with a red circle. The main dashboard area contains several sections:

- Tasks:** A table with columns for Type, Due, and Status. It shows "~ No tasks ~".
- Member Workflows:** A table with columns for Type and Mem. Ct. It lists Prospect (20) and Applicant (1).
- Member Pipeline:** A table with columns for Type and Mem. Ct. It lists Entered Apprentice (1) and Master Mason (23).
- Recap 07/01/2023 to 06/30/2024:** A table with columns for Type and Mem. Ct. It lists Total Gains (5).
- Lodge Operations:** A section with an Audit Report link.
- Dues Summary:** A pie chart showing categories: endowed, exempt, and owi... (likely OWI).
- Member Engagement:** A section with a tip: "Click on chart to download an Excel report for each group." It features a blue circular icon with an @ symbol and a green circular icon with a document symbol.



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# Store and Share Files in the Vault

7

Click on a folder to expand it.

Masons of California

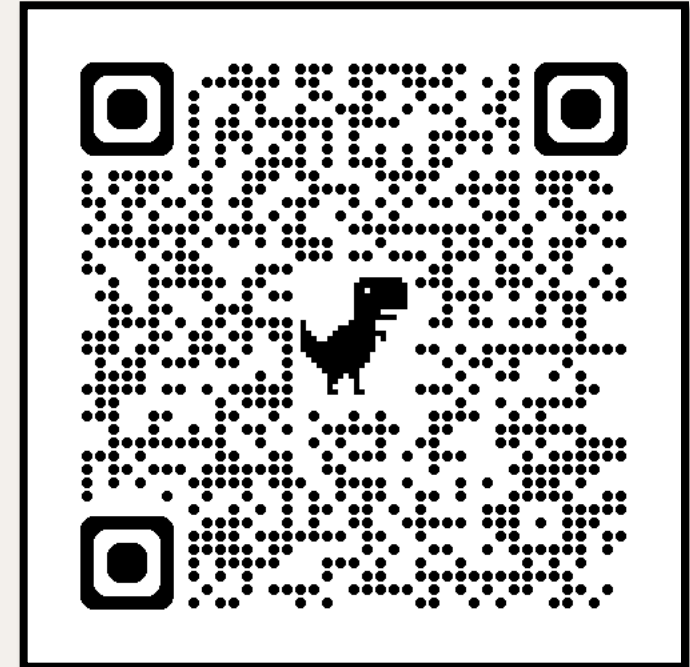
LOGOS NO. 861

FILE VAULT

FILE VAULT >> SELECTED

LODGE: Logos No. 2038

- Agenda & Minutes
  - 2019
  - Artwork
  - 2016.11 Stated Meeting - Minutes.pdf (26.6 KB)
  - 2016.12 Stated Meeting - Minutes.pdf (175 KB)
  - 2017.01 Stated Meeting - Minutes.pdf (120 KB)
  - 2017.02 Stated Meeting - Minutes.pdf (31.4 KB)
  - 2017.03 Stated Meeting - Minutes.pdf (26.9 KB)
  - 2017.04 Stated Meeting - Minutes.pdf (25.6 KB)
  - 2017.05 Stated Meeting - Minutes.pdf (24.5 KB)
  - 2017.06 Stated Meeting - Minutes.pdf (31.1 KB)
  - 2017.07 Stated Meeting - Minutes.pdf (187 KB)

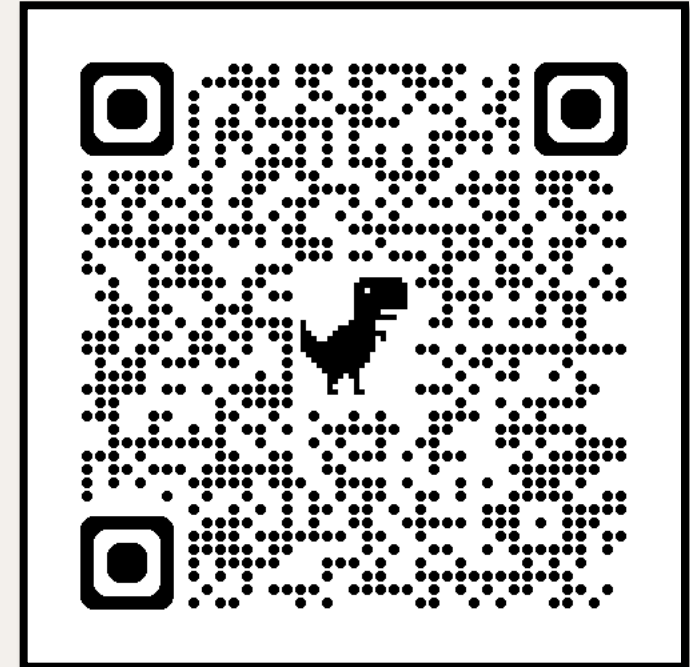


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# Store and Share Files in the Vault

8 Click "Add File"

The screenshot displays the 'Masons of California' File Vault interface. At the top, it shows 'LOGOS NO. 861' and 'FILE VAULT'. The main content area is titled 'FILE VAULT >> SELECTED FOLDER: AGENDA'. A sidebar on the left shows a navigation menu with icons for home, search, users, folders, settings, and help. The main area shows a folder structure: 'LODGE: Logos No. 2038' containing 'Agenda & Minutes', '2019', and 'Artwork'. Below these are several PDF files with their dates and sizes. A context menu is open over the 'Agenda & Minutes' folder, listing options: 'Edit Folder', 'Delete Folder', 'Add Folder', and 'Add File'. The 'Add File' option is highlighted with a red circle.

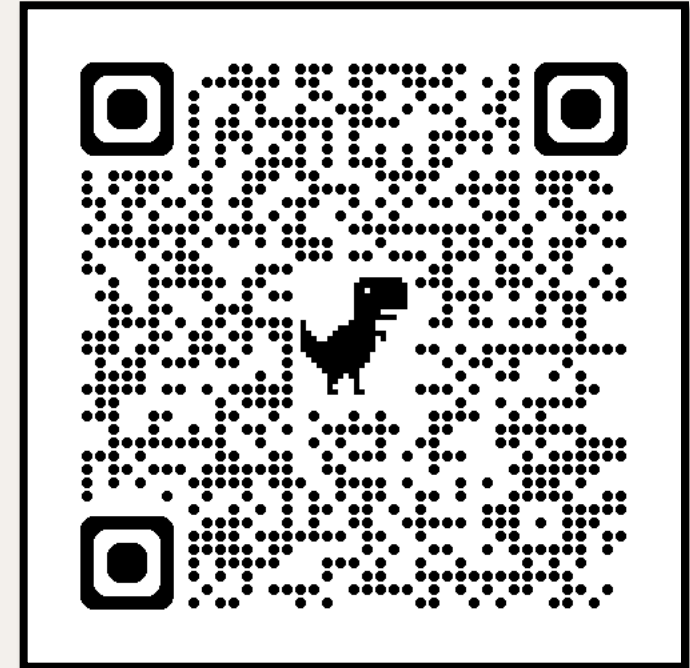


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# Store and Share Files in the Vault

9 Click "Add Folder" to create a new folder.

The screenshot displays the 'FILE VAULT' interface for 'Masons of California'. The top navigation bar includes the organization's logo, the name 'Masons of California', and a 'Spoofing' indicator. Below this, the user's 'LOGOS NO. 861' and 'FILE VAULT' status are shown. A green notification banner at the top states 'File has been deleted.' The main content area shows a folder tree for 'LODGE: Logos No. 2038' with subfolders like 'Agenda & Minutes', 'Artwork', 'Documents', 'Financial Reports', 'Secretary Reports', 'Tax', 'Website', and 'Whistleblower Policy'. A file 'Bank Reconciliation Report Aug 2022.pdf (4.11 KB)' is listed below. A context menu is open over the 'Agenda & Minutes' folder, offering options: 'Edit Folder', 'Delete Folder', 'Add Folder' (highlighted with an orange circle), and 'Add File'. A breadcrumb trail at the top of the folder view reads 'FILE VAULT >> SELECTED FOLDER: AGENDA'.



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# Store and Share Files in the Vault

**10** Enter the name of the new folder in the "Name" field.

**New Folder in Agenda & Minutes**

Name

Description

**Folder: Agenda & Minutes**

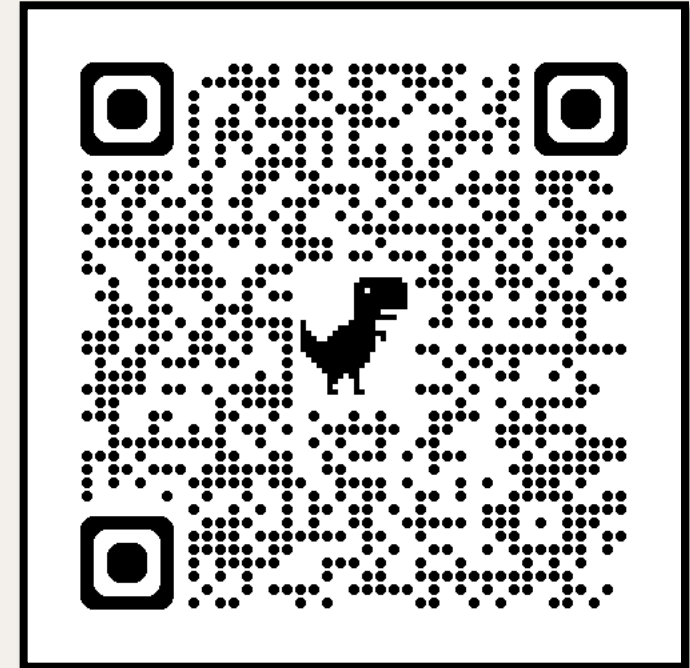
- Edit Folder
- Delete Folder
- Add Folder
- Add File

**Enable members in these statuses to view this folder:**

- Applicant
- Entered Apprentice
- Fellowcraft
- Master Mason
- Prospect
- Website

**Enable these officers to view this folder:**

- Worshipful Master
- Senior Warden
- Junior Warden
- Treasurer



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# Store and Share Files in the Vault



Enter the description of the folder in the "Description" field.

**New Folder in LODGE: Logos No. 2038**

Name: Charity

Description: [Empty field]

Root-folder: LODGE: Logos No. 2038

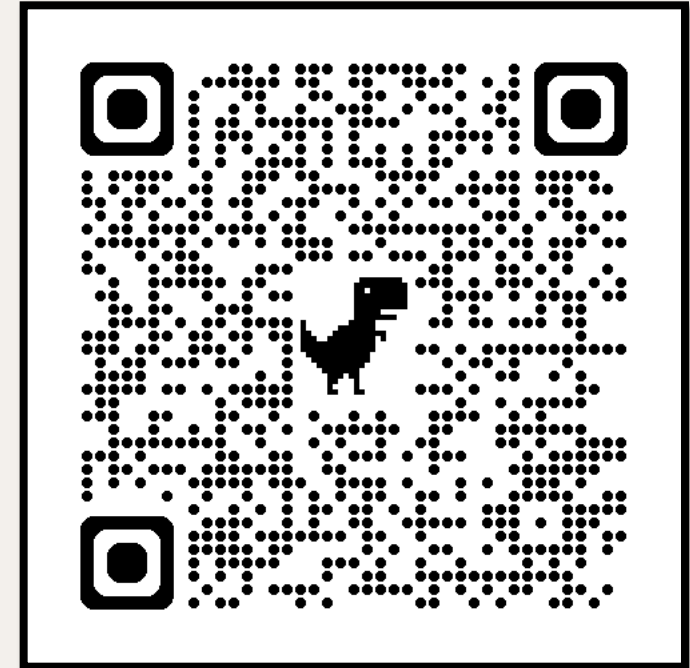
- Edit
- Delete
- Add Folder
- Add File

Enable members in these statuses to view this folder:

- Applicant
- Entered Apprentice
- Fellowcraft
- Master Mason
- Prospect

Enable these officers to view this folder:

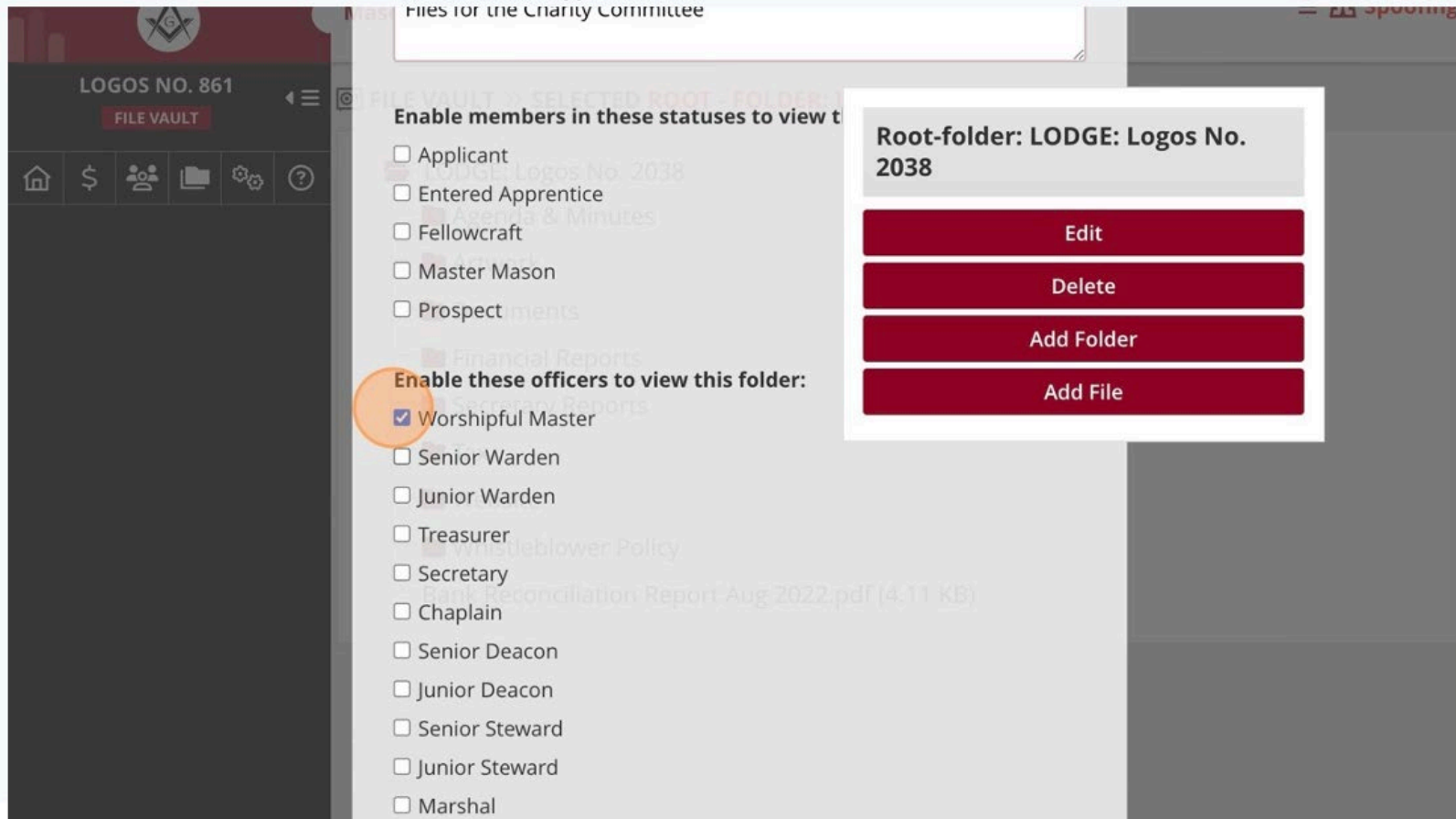
- Worshipful Master
- Senior Warden
- Junior Warden
- Treasurer



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# Store and Share Files in the Vault

## 12 Select the member or officer type that can view the folder.



The screenshot shows the 'FILE VAULT' interface for 'LOGOS NO. 861'. A modal window titled 'Root-folder: LODGE: Logos No. 2038' is open, displaying a list of member statuses and officer types. The 'Worshipful Master' status is selected under the 'Enable these officers to view this folder:' section. The modal also contains buttons for 'Edit', 'Delete', 'Add Folder', and 'Add File'.

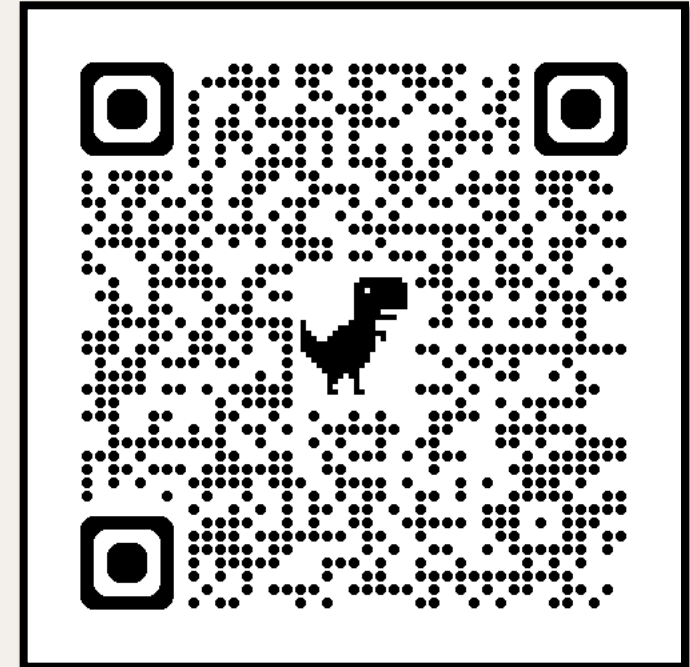
**Enable members in these statuses to view this folder:**

- Applicant
- Entered Apprentice
- Fellowcraft
- Master Mason
- Prospect

**Enable these officers to view this folder:**

- Worshipful Master
- Senior Warden
- Junior Warden
- Treasurer
- Secretary
- Chaplain
- Senior Deacon
- Junior Deacon
- Senior Steward
- Junior Steward
- Marshal

Buttons in the modal: Edit, Delete, Add Folder, Add File

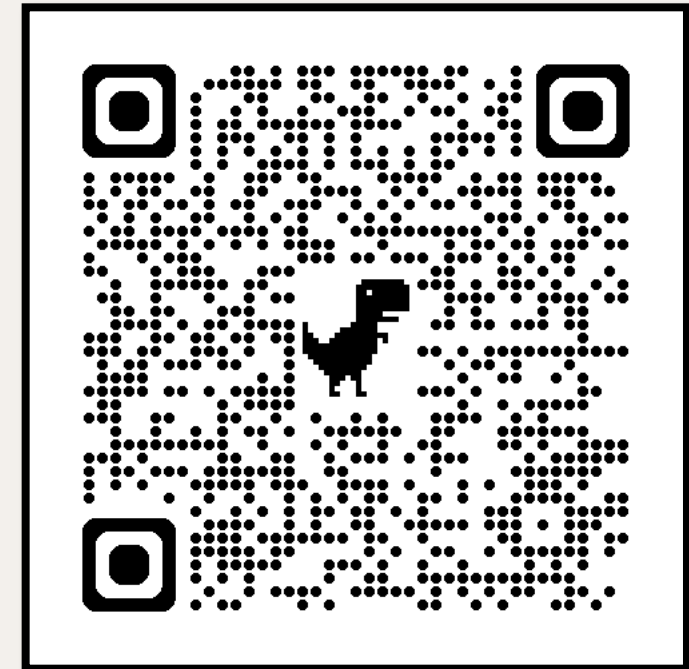


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# Store and Share Files in the Vault

**13** Click the "add folder" button to add the folder.

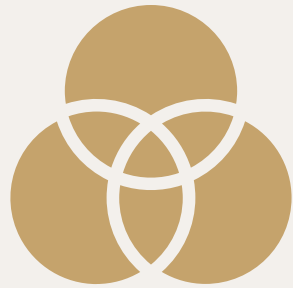
The screenshot shows a web application interface. On the left is a dark sidebar with navigation icons (home, dollar sign, group of people, folder, gear, question mark) and text: "Back to Top ^" and "Expand Footer ^". The main content area has a list of roles with checkboxes: Treasurer, Secretary (checked), Chaplain, Senior Deacon, Junior Deacon, Senior Steward, Junior Steward, Marshal, Tiler, Organist, Trustee, Assistant Secretary, Assistant Treasurer, Fraternal Support Services Ambassador, Officers Coach, Candidate Coach, Elected Representative, and Prospect Manager. At the bottom of this list is a red "Add Folder" button. To the right, a context menu is open for a folder named "2038", showing four red buttons: "Edit", "Delete", "Add Folder", and "Add File".



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**Plan and promote events**

# Plan and Promote Events



Add events with RSVP options.

















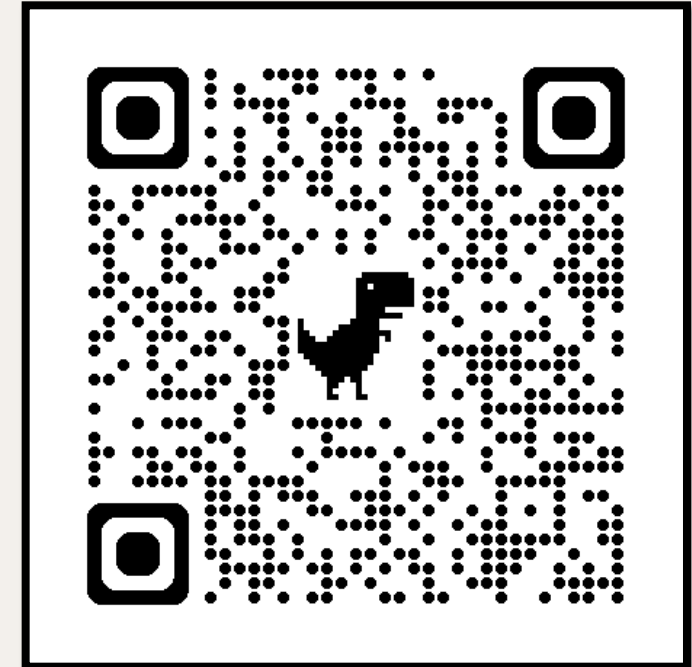
Auto reminders and calendar integration.

# Plan and Promote Events

Navigate to <http://member.freemason.org> and login.

Menu My Portal Lodge

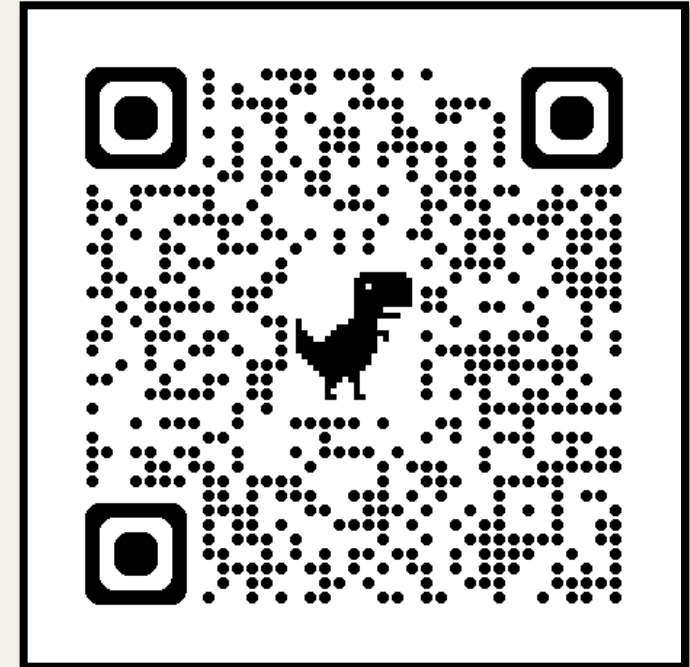
 Feed	 Events	 My Profile	 Virtual Card	 Education
 Grand Lodge	 Grand Lodge Recognition	 Member Search	 Find Meetings	 Lodge Locator
 Resources	 Rituals	 Candidate Coach	 Leadership Retreats - REGISTER NOW!	



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# Plan and Promote Events

... To navigate to your lodge dashboard, click "Lodge"



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# Plan and Promote Events

3

Click "Meetings & Events"

LODGE NO. 001

Dashboard >  
Members >  
Spouses/Widows >  
Other Contacts >  
Newsletters (formerly Posts) >  
**Meetings & Events** >  
Reports & Labels >  
List Builder (formerly Report Builders) >  
Tasks >  
- - >  
Back to Top ^

Tasks	Type	Due	Status
~ No tasks ~			

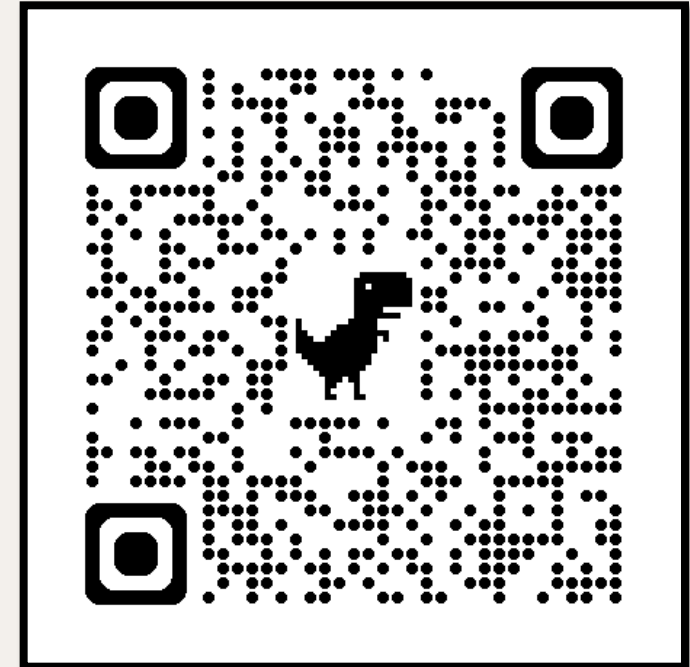
Member Workflows	Mem. Ct.
Prospect	20
Applicant	1

Member Pipeline	Mem. Ct.
Entered Apprentice	1
Master Mason	23

Lodge Operations  
Audit Report

Dues Summary

Member Engagement  
Tip: Click on chart to download an Excel report for each group.

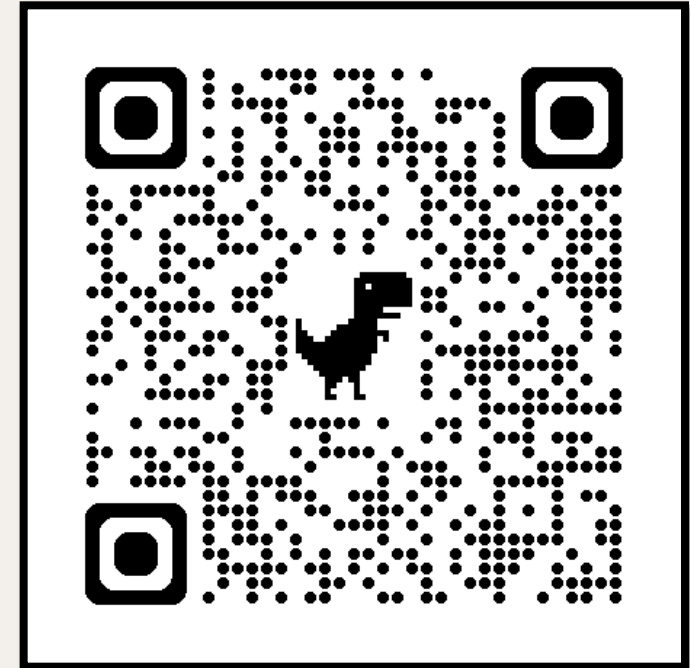
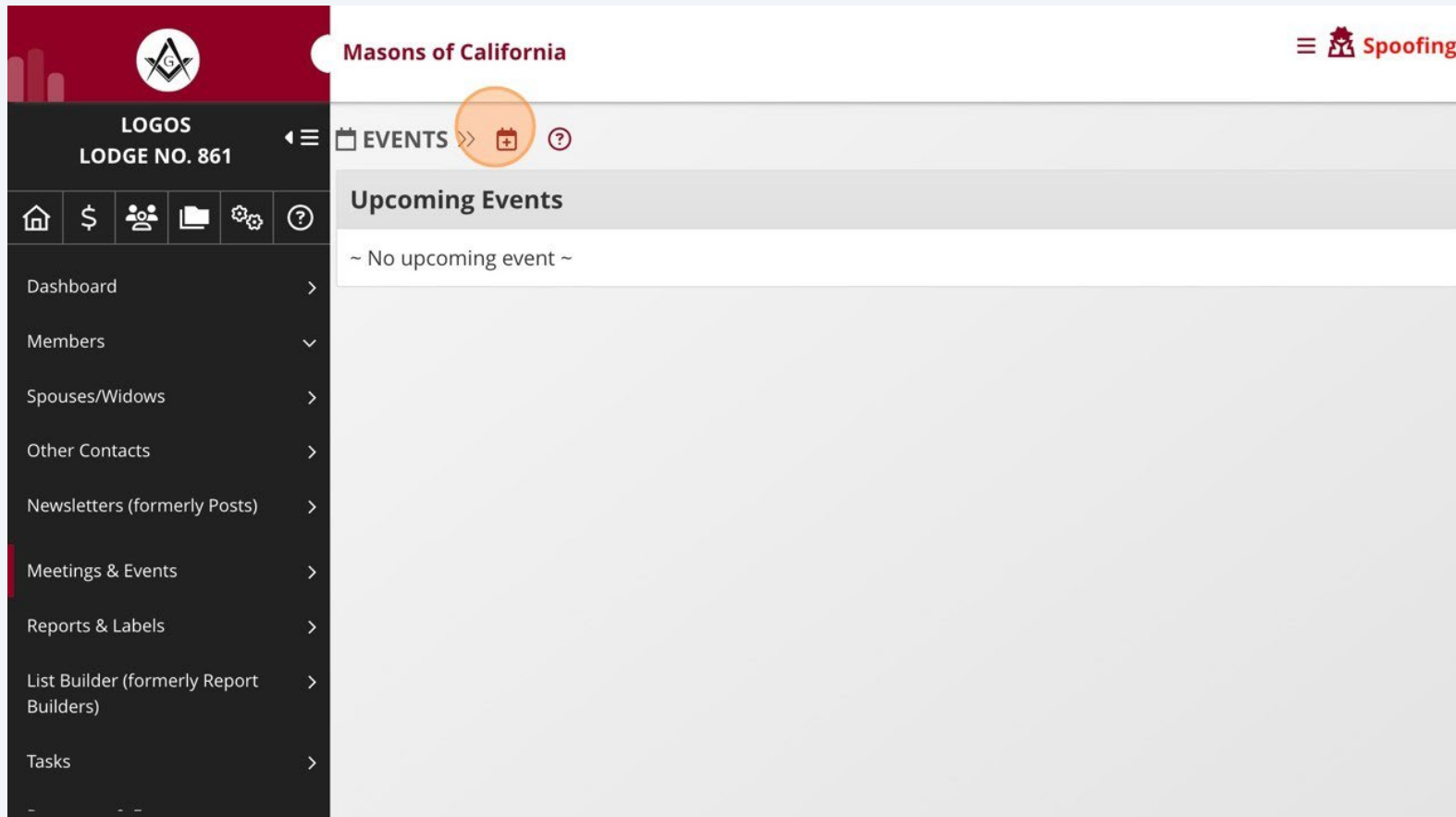


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# Plan and Promote Events

4

Click the plus icon to create a new event.



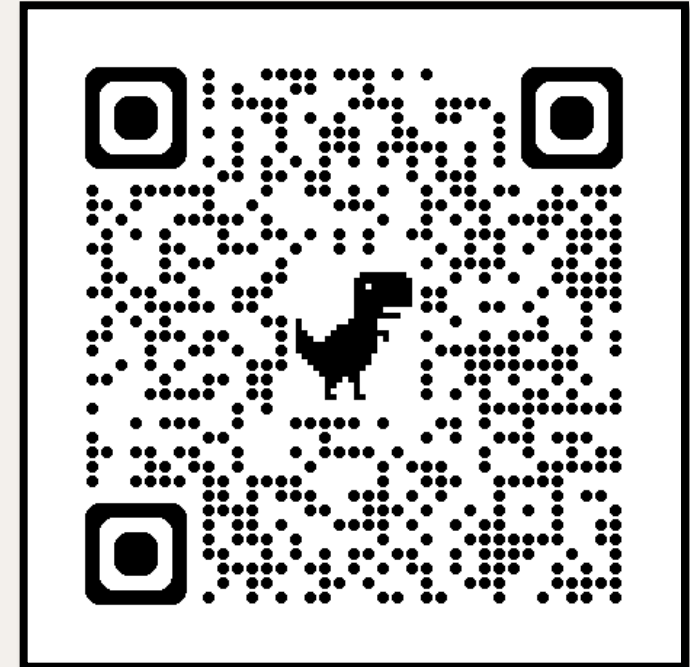
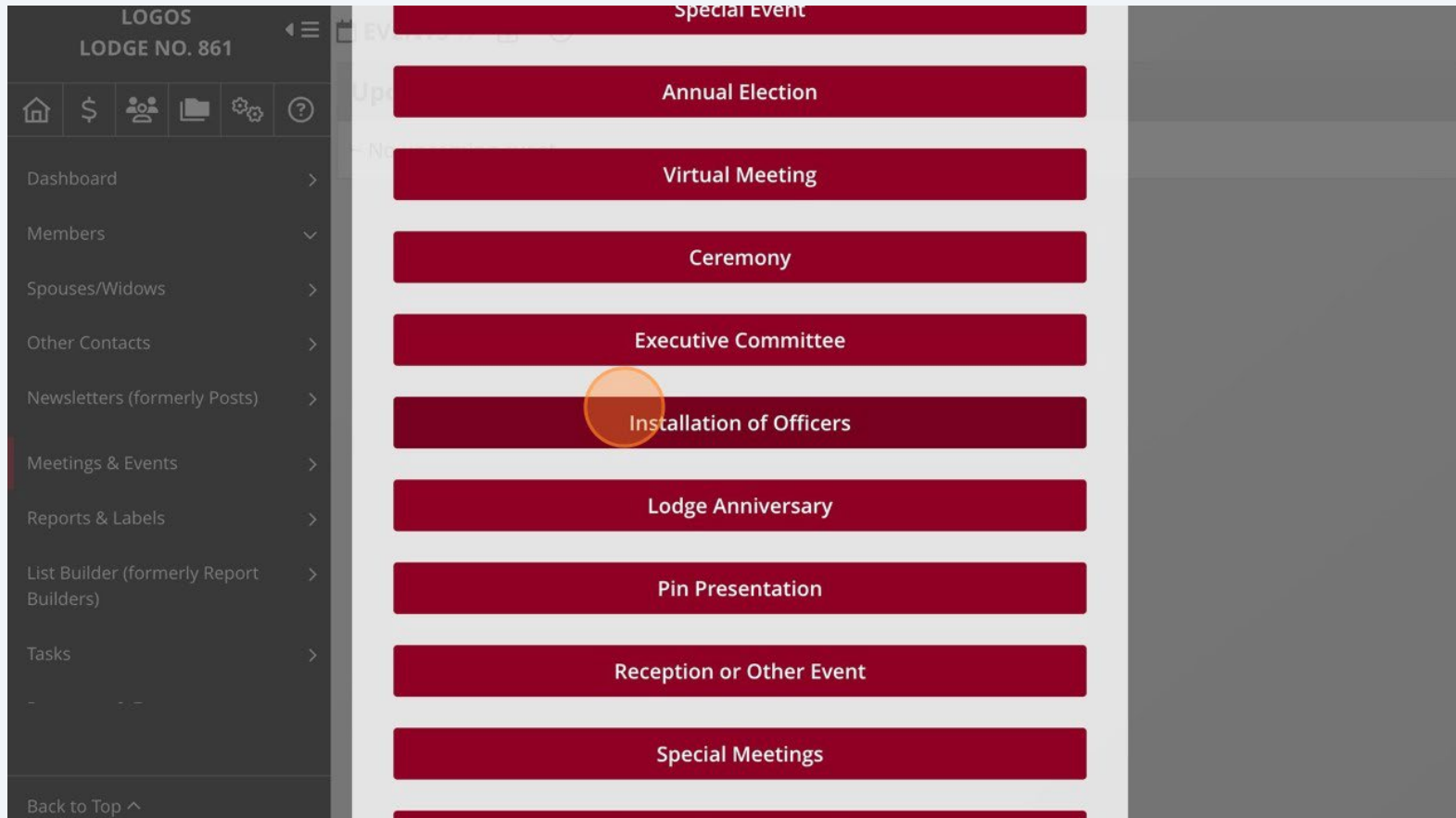
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# Plan and Promote Events

5

Select the type of event from this menu of options.



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# Plan and Promote Events



Enter the event name in the "\* Event Name" field.

**Masons of California** Spoofing

**LOGOS**  
LODGE NO. 861  
EVENTS

**CREATING EVENT >>**

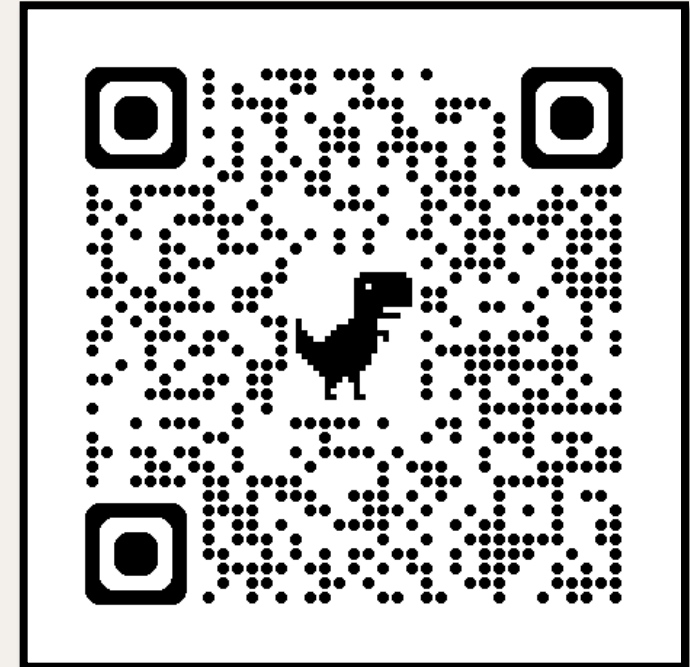
Event Type: Installation of Officer

\* Event Name: Add a short, clear name

Date/Time:  
\* Start Date (mm-dd-yyyy): 03-25-2025  
End Date (mm-dd-yyyy): mm-dd-yyyy  
\* Start Time: - Select a Start Time -  
End Time: - Select an End Time -

Dress Code: Black Tie (Tuxedos)

Description: **B** *i* U **A:** [Rich text editor icons]



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# Plan and Promote Events

7

Enter the event date and time

Masons of California ☰ Spoofing

LOGOS  
LODGE NO. 861  
EVENTS

CREATING EVENT >>

Event Type: Installation of Officer

\* Event Name: Installation of 2026 Officers

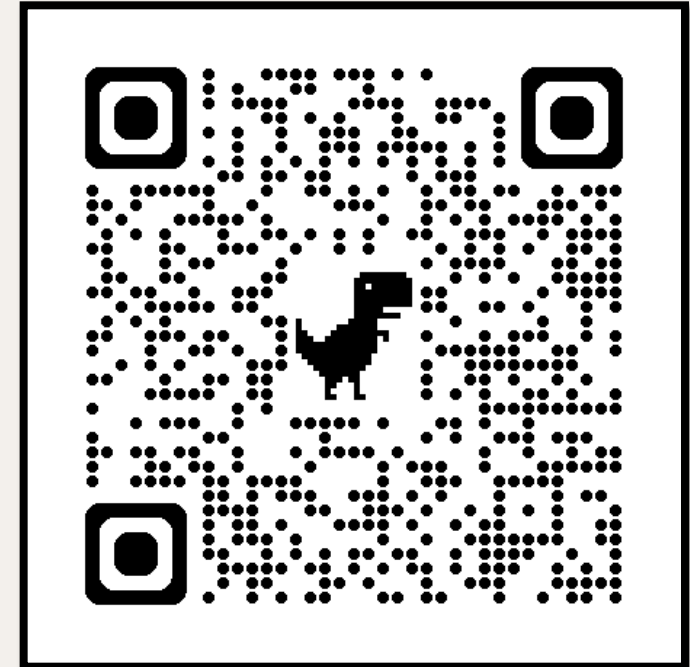
Date/Time

* Start Date (mm-dd-yyyy)	End Date (mm-dd-yyyy)
03-25-2025	mm-dd-yyyy
* Start Time	End Time
- Select a Start Time -	- Select an End Time -

Dress Code: Black Tie (Tuxedos)

Description

B i U A: = = ≡ ¶: ↻ ↺ A :



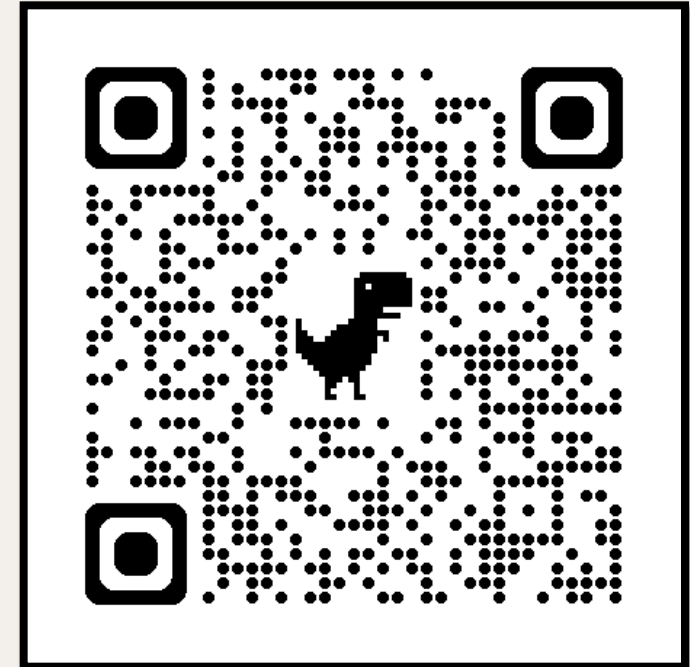
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# Plan and Promote Events

8

Enter an event description.

The screenshot shows a mobile application interface for event planning. On the left is a dark sidebar with icons for home, currency, users, documents, settings, and help. At the bottom of the sidebar are 'Back to Top ^' and 'Expand Footer ^' options. The main content area is light gray and contains several form fields: 'Start Time' (7:30 PM), 'End Time' (- Select an End Time -), 'Dress Code' (Black Tie (Tuxedos)), and a 'Description' field with a rich text editor toolbar. The toolbar includes icons for bold, italic, underline, link, unlink, list, indent, link, image, document, and a plus sign. Below the toolbar is a text input area with a placeholder 'Type something' and a blue circular highlight around the text.



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# Plan and Promote Events

9

Edit fields such as hosted by, location and cost.

Masons of California

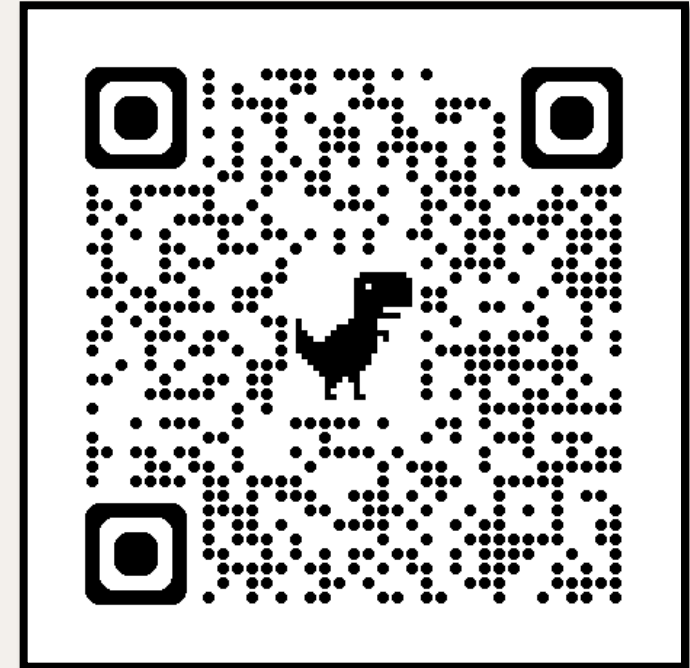
Powered by Froala Characters : 328

Hosted By

Location  Check to change location if event will not be held at Lodge's address: 1111 California St San Francisco CA 94108-2252

Cost  Check to enter cost if this event is NOT free

Reservation Reservation Cut-off Date (mm-dd-yyyy) Cap registration at Leave blank to allow un



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# Plan and Promote Events



Edit reservation information such as reservation cut off date, registration cap (maximum attendance) and additional instructions for registration.

Masons of California Spoofing

Reservation

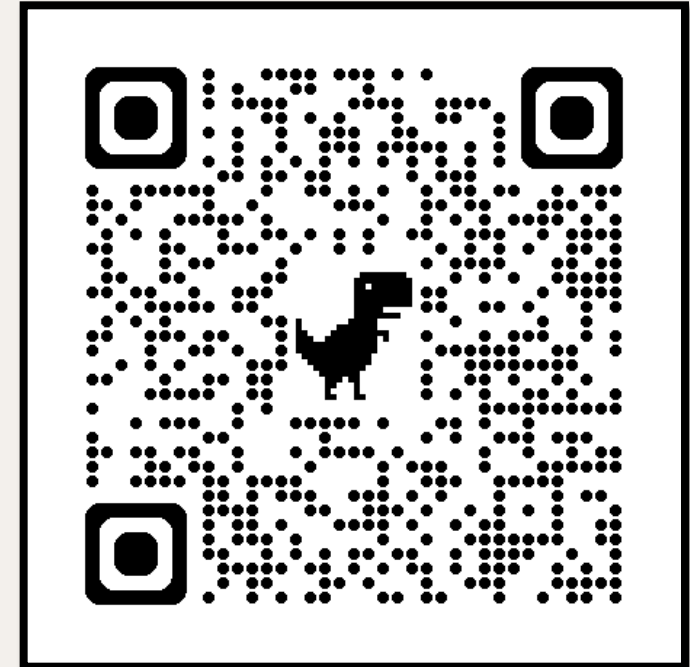
Reservation Cut-off Date (mm-dd-yyyy)  Cap registration at

Additional Instructions for Registration

**B** *i* U A: [List] [Text] [Link] [Image] [Document] [+]

[Undo] [Redo] [Bold] [List]

Type something



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# Plan and Promote Events

Provide lodging information, if applicable.

**Masons of California** Spooing

LOGOS  
LODGE NO. 861  
EVENTS

Home \$ People Calendar Settings Help

Lodging

Name

Address Line 1  Address Line 2

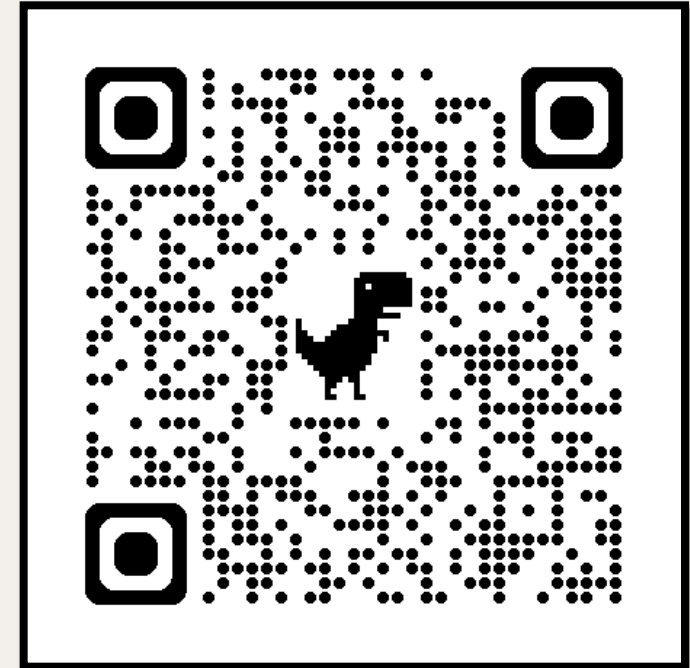
City  State  Zip Code

Phone  Email

Lodging Code / Discount Code for group rates  Booking Link

Event Contact

Contact Name  Contact Email



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# Plan and Promote Events

12

Edit the event contact and event options fields.

Masons of California

LOGOS  
LODGE NO. 861  
EVENTS

Phone

Email

Lodging Code / Discount Code for group rates

Booking Link

Event Contact

Contact Name

Contact Email

Contact Address

Event Options

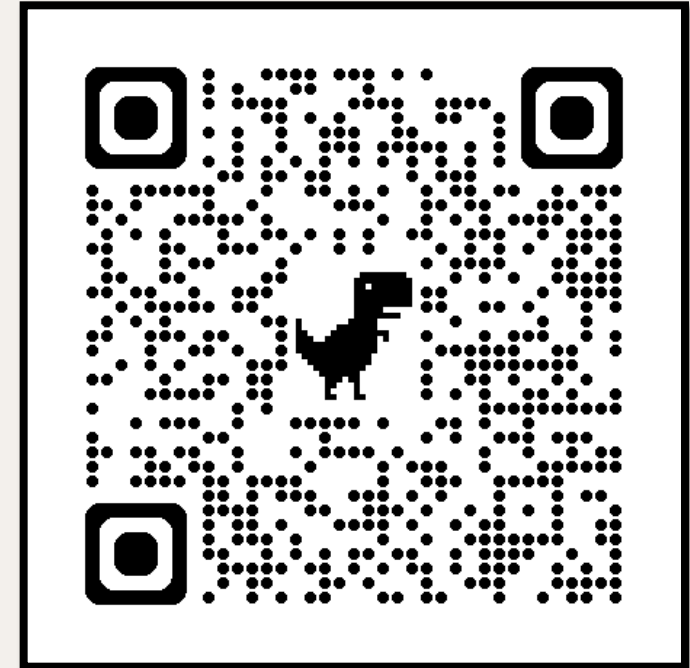
\* What is the maximum number of guests who can attend with each member?

99

Enter 0 if guest is not allowed to attend

Allow registrants to register and pay later (you are responsible to collect payments)

Hide event from members' calendar



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# Plan and Promote Events

13

Click the "Create Event" button to create the event.

Event Contact

Contact Name  
Andrew Travis

Contact Email  
atravis@freemason.org

Contact Address

Event Options

\* What is the maximum number of guests who can attend with each member?  
99  
Enter 0 if guest is not allowed to attend

Allow registrants to register and pay later (you are responsible to collect payments)

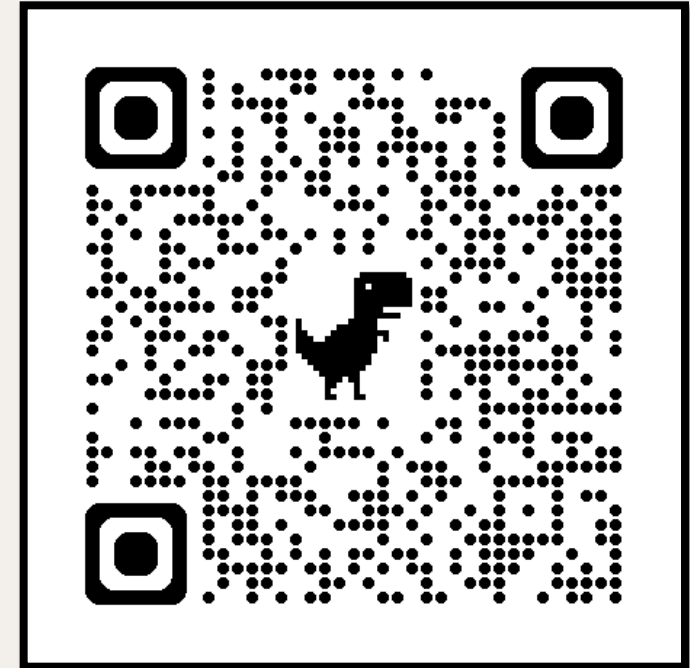
Hide event from members' calendar

Disable registration for this event

Back to Top ^

Expand Footer ^

Create Event Cancel



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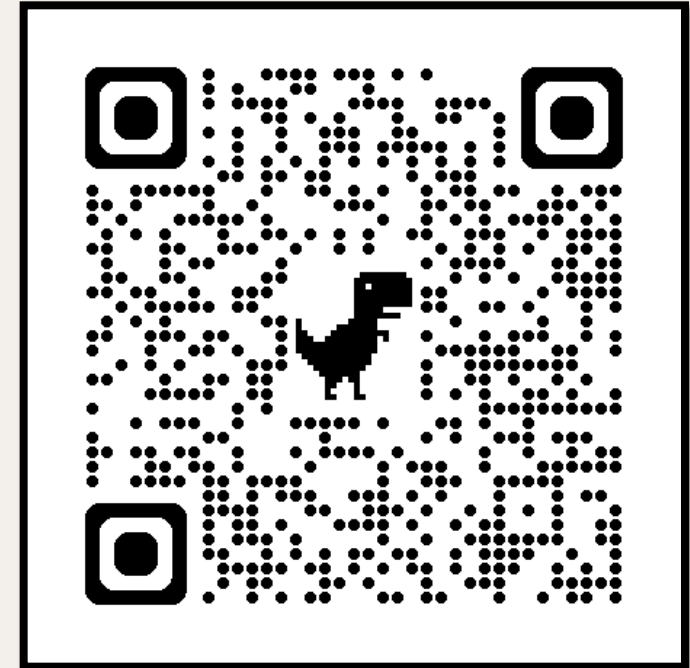
# Plan and Promote Events

14

Click "Admin Tools"

The screenshot shows the LOGOS interface for 'Lodge No. 861'. The left sidebar contains navigation options: Home, Finance, Members, Documents, Settings, and Help. Below these are menu items: 'Manage RSVPs', 'Event Details', 'Event Tickets / Items', 'Admin Tools' (highlighted with a red circle), 'Communications', and 'Quick Check In'. The main content area is titled 'EVENT: INSTALLATION OF 2026 OFFICERS' and contains the following fields:

- Event Type:** Installation of Office
- Event Name:** Installation of 2026 Officers
- Date/Time:**
  - Start Date (mm-dd-yyyy): 12-04-2025
  - End Date (mm-dd-yyyy): 12-04-2025
  - Start Time: 7:30 PM
  - End Time: - Select an End Time
- Dress Code:** Black Tie (Tuxedos)
- Description:** A rich text editor with icons for Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Image, Document, and Undo.



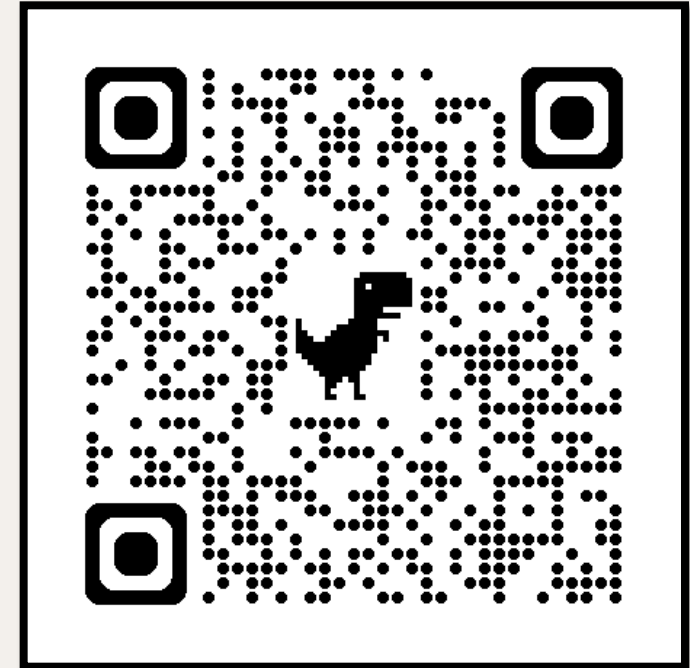
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# Plan and Promote Events



Click "Register a Member" to register a member on their behalf.

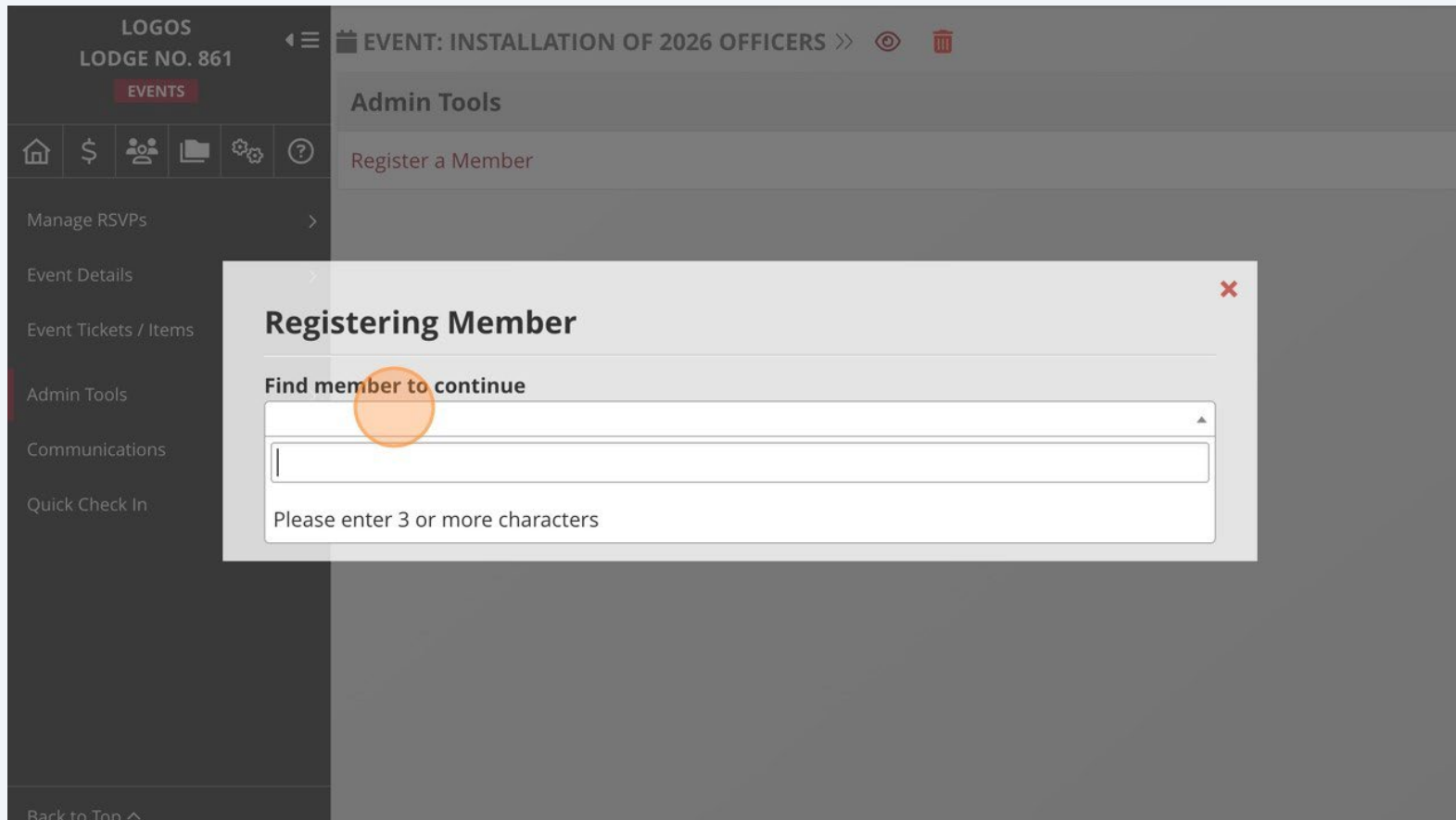
The screenshot shows the LOGOS web application interface for 'Masons of California'. The top navigation bar includes the lodge name and a 'Spoofing' button. Below this, the event title 'EVENT: INSTALLATION OF 2026 OFFICERS' is displayed. A sidebar on the left contains navigation options such as 'Manage RSVPs', 'Event Details', 'Event Tickets / Items', 'Admin Tools', 'Communications', and 'Quick Check In'. The main content area features an 'Admin Tools' section with a 'Register a Member' button highlighted by an orange circle.



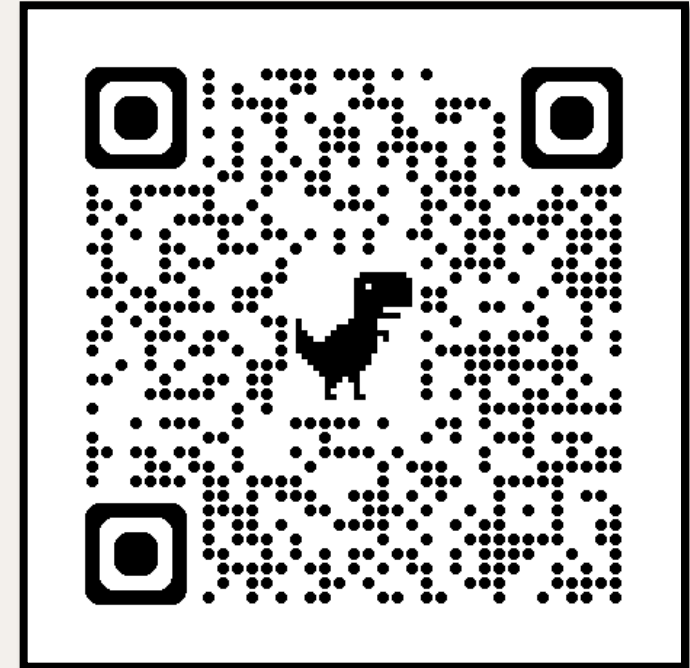
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# Plan and Promote Events

16 Begin typing the members name in this box



The screenshot displays the LOGOS web application interface for 'LODGE NO. 861'. The main header shows 'EVENT: INSTALLATION OF 2026 OFFICERS'. A sidebar on the left contains navigation options: Home, Finance, Members, Documents, Settings, and Help. The main content area is titled 'Admin Tools' and includes a 'Register a Member' link. A modal dialog box titled 'Registering Member' is open, featuring a search input field with the placeholder text 'Find member to continue'. An orange circle highlights the search input field. Below the input field, a message reads 'Please enter 3 or more characters'. The background interface is dimmed.

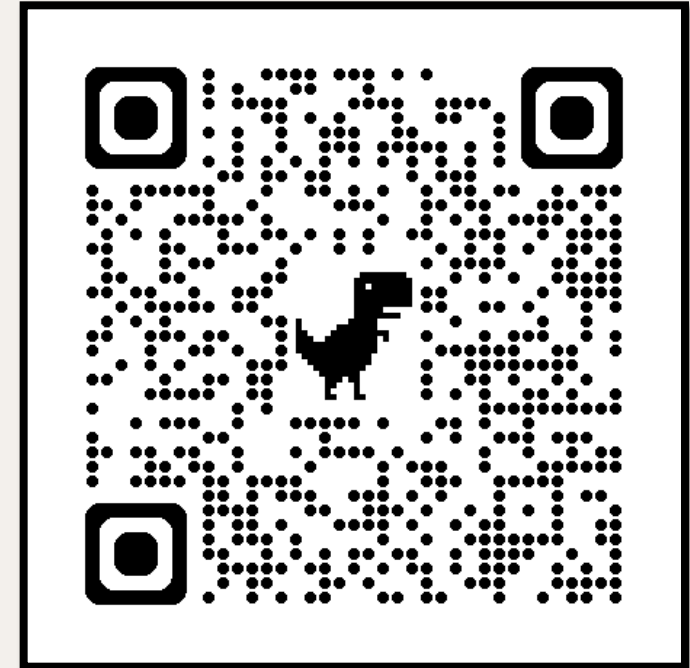


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# Plan and Promote Events

17 Click the member's name.

The screenshot shows the 'Admin Tools' interface with a 'Registering Member' dialog box open. The dialog box contains a search field with the text 'tuck' and a dropdown menu showing the search results. The first result, 'James Lewis Tucker #345332', is highlighted in blue. An orange circle highlights the member's name in the dropdown. The background interface includes a sidebar with navigation options like 'Manage RSVPs', 'Event Details', 'Event Tickets / Items', 'Admin Tools', 'Communications', and 'Quick Check In'. The top navigation bar includes icons for home, currency, users, folders, settings, and help.



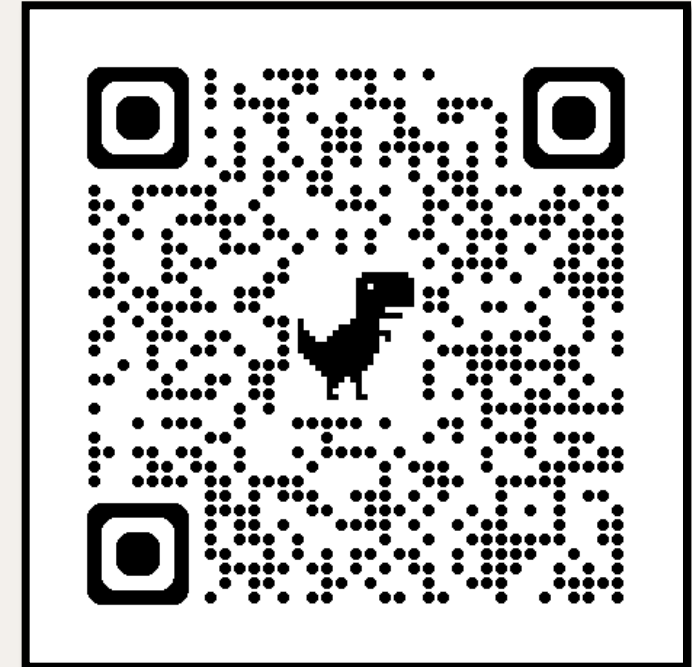
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# Plan and Promote Events

18

Click the "Continue" button to register the member for the event.

The screenshot shows a web application interface. On the left is a dark sidebar with navigation options: Manage RSVPs, Event Details, Event Tickets / Items, Admin Tools, Communications, and Quick Check In. The main content area is titled 'Admin Tools' and 'Register a Member'. A modal window titled 'Registering Member' is centered on the screen. It contains a search field labeled 'Find member to continue' with the text 'James Lewis Tucker #345332' entered. Below the search field is a red button labeled 'Continue', which is highlighted with an orange circle. The modal also has a close button (red 'x') in the top right corner.



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# Plan and Promote Events



Click "Communications" to schedule a broadcast for the event.

LODGE NO. 861  
EVENTS

Admin Tools

Register a Member

Manage RSVPs >

Event Details >

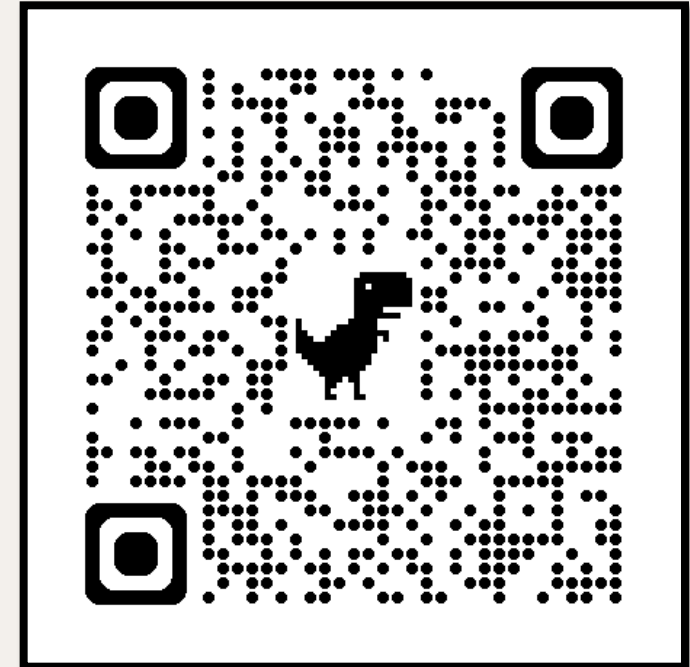
Event Tickets / Items v

Admin Tools >

Communications >

Quick Check In >

Back to Top ^



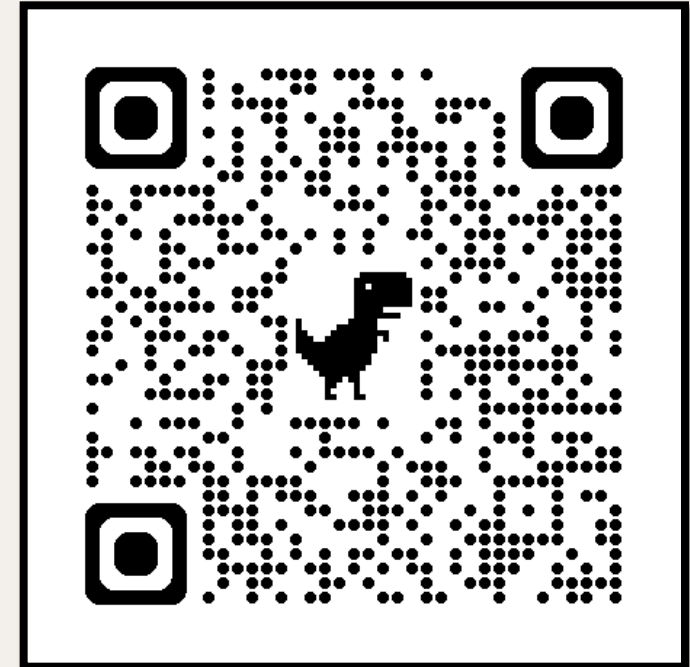
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# Plan and Promote Events

20

Click "Manage Audiences" to determine whom you would like to broadcast the event to.

The screenshot shows the web application interface for "Masons of California". At the top, the logo and "Masons of California" text are on the left, and a "Spoofing" icon is on the right. Below this is a header for the event: "EVENT: INSTALLATION OF 2026 OFFICERS" with navigation icons. A "Communications" section is highlighted, with a "Manage Audiences" link circled in orange. Below this, there are three main sections: "Post Mails' Audiences" (with links for "Preview Letter" and "Print Letters (Disabled)", and a note that no mailing distribution list is selected), "Scheduled Broadcasts" (with a link for "Create Broadcast (Disabled - Add Audiences first to create broadcast)", and a note that no broadcast has been scheduled), and "Selected Email Distribution Lists" (with a note that no email distribution list is selected). At the bottom, there is a section for "Selected SMS Distribution Lists" (with a note that no text distribution list is selected). On the left side, there is a dark sidebar menu with the "LOGOS LODGE NO. 861" header and "EVENTS" sub-header. The menu items include: Manage RSVPs, Event Details, Event Tickets / Items, Admin Tools, Communications (highlighted), and Quick Check In.

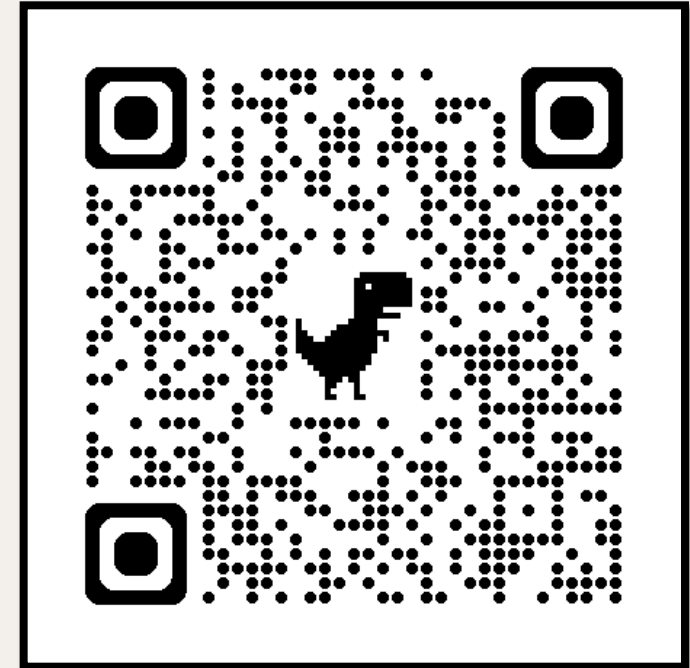
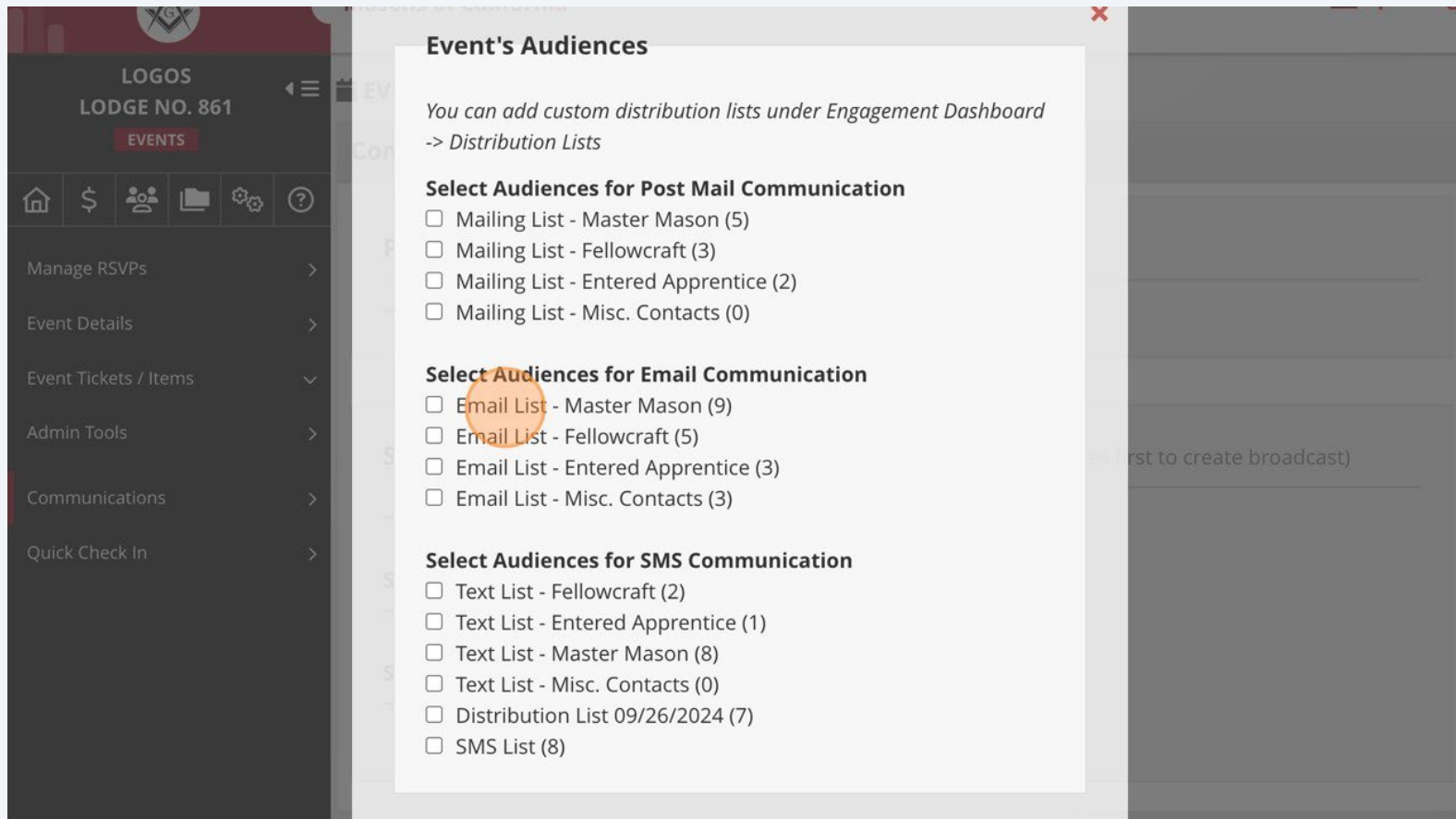


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# Plan and Promote Events

21

Select your intended audience from this window.



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# Plan and Promote Events

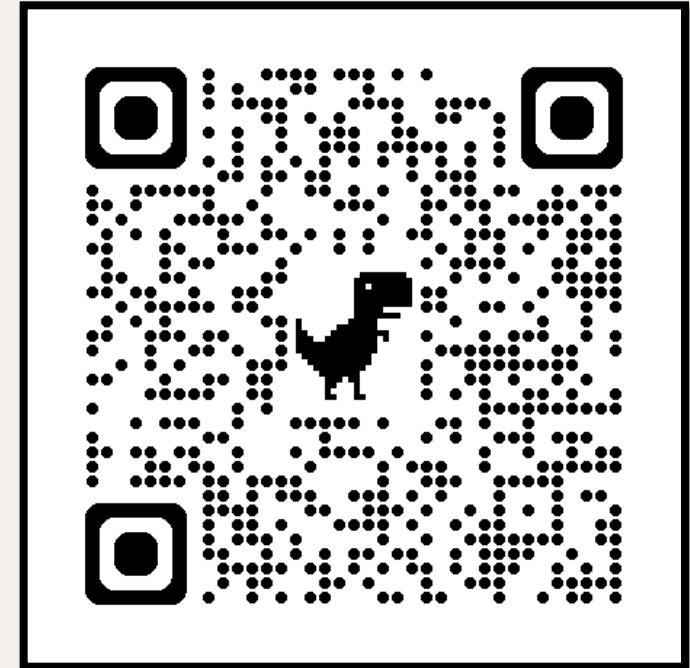
22

Click the "Update Audiences" button to save your selection.

The screenshot shows a web application interface with a dark sidebar on the left containing navigation options: Manage RSVPs, Event Details, Event Tickets / Items, Admin Tools, Communications, and Quick Check In. The main content area is titled "Distribution List" and features three sections for selecting audiences:

- Select Audiences for Post Mail Communication**
  - Mailing List - Master Mason (5)
  - Mailing List - Fellowcraft (3)
  - Mailing List - Entered Apprentice (2)
  - Mailing List - Misc. Contacts (0)
- Select Audiences for Email Communication**
  - Email List - Master Mason (9)
  - Email List - Fellowcraft (5)
  - Email List - Entered Apprentice (3)
  - Email List - Misc. Contacts (3)
- Select Audiences for SMS Communication**
  - Text List - Fellowcraft (2)
  - Text List - Entered Apprentice (1)
  - Text List - Master Mason (8)
  - Text List - Misc. Contacts (0)
  - Distribution List 09/26/2024 (7)
  - SMS List (8)

At the bottom of the main content area, there is a red button labeled "Update Audiences" with a white circular highlight over the text.



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# Plan and Promote Events

23

Click "Communications"

LODGE NO. 861

EVENTS

EVENT: INSTALLATION OF 2026 OFFICERS >> [Eye Icon] [Trash Icon]

### Event Details

Event Type: Installation of Office

\* Event Name: Installation of 2026 Officers

Date/Time

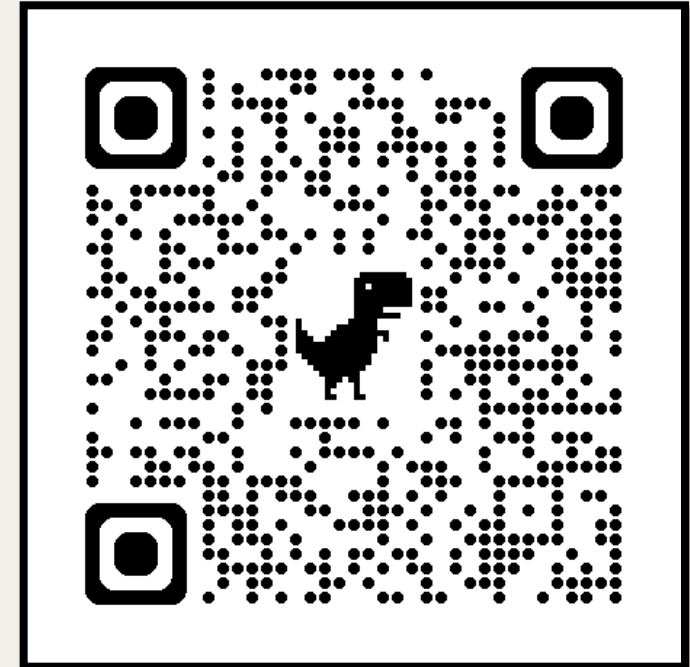
* Start Date (mm-dd-yyyy)	End Date (mm-dd-yyyy)
12-04-2025	12-04-2025
* Start Time	End Time
7:30 PM	- Select an End Time

Dress Code: Black Tie (Tuxedos)

Description

[Rich Text Editor Icons: Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Link, Image, Document, More]

Back to Top ^



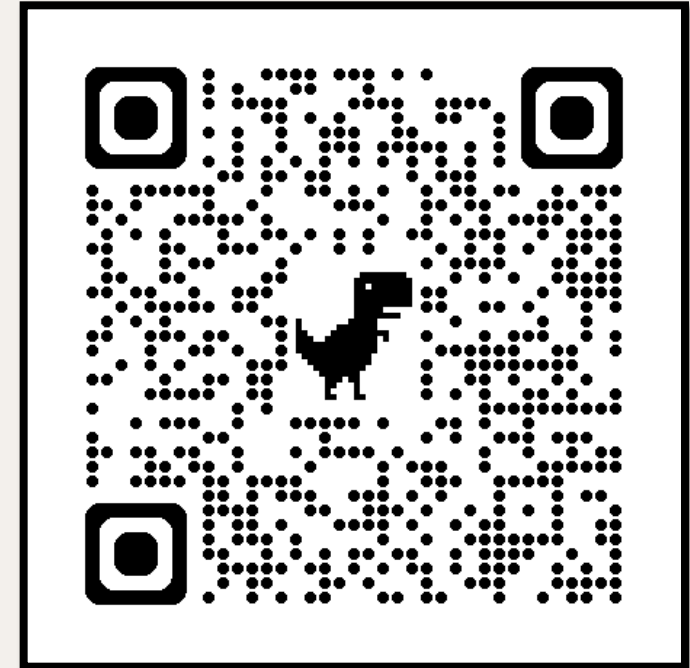
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# Plan and Promote Events

24

Click "Schedule Broadcast"

The screenshot shows the web application interface for 'Masons of California'. The top navigation bar includes the organization's logo, the name 'Masons of California', and a 'Spoofing' indicator. A tip at the top reads: 'Tip: Click on the list name to download an EXCEL report of subscribers in list.' The main content area is divided into two sections. The first section, 'Post Mails' Audiences', contains links for 'Preview Letter' and 'Print Letters (Disabled)', with a message below stating '~ No mailing distribution list selected ~'. The second section, 'Scheduled Broadcasts', contains links for 'Send Broadcast Now' and 'Schedule Broadcast', with a message below stating '~ No broadcast has been scheduled for this event ~'. The 'Schedule Broadcast' link is highlighted with an orange circle. Below this is a 'Selected Email Distribution Lists' section with four entries: 'Email List - Master Mason (9)', 'Email List - Fellowcraft (5)', 'Email List - Entered Apprentice (3)', and 'Email List - Misc. Contacts (3)', each with a timestamp of 'Last updated on 8 February, 2023 @ 10:17AM'. On the left, a dark sidebar menu lists various options: 'LOGOS LODGE NO. 861', 'EVENTS', 'Manage RSVPs', 'Event Details', 'Event Tickets / Items', 'Admin Tools', 'Communications', and 'Quick Check In'. The 'EVENTS' option is highlighted with a red bar.



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# Plan and Promote Events

25

Enter the date and time of your scheduled broadcast.

LOGOS  
LODGE NO. 861  
EVENTS

Masons of California

Tip: Click on the list name to download an EXCEL report of subscribers in list.

Post Mails\* Audiences > Preview Letter > Print Letters (Disabled) X

### Creating Broadcast

No mailing distribution list selected

Event Date: 12/04/2025

Broadcast Date (mm-dd-yyyy)  
03-25-2025

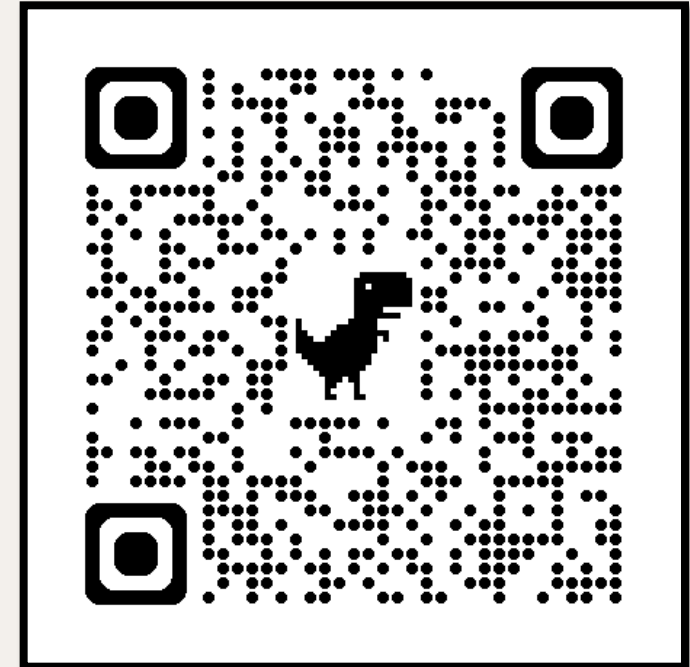
Time to send (Current time: 12:43:23 -0700)  
8:00 AM

Select type of messages you want to send with this broadcast

No Text messages (0 subscribers)

No Emails (20 subscribers)

Schedule broadcast Back



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step by step guide

# Plan and Promote Events

26

Select if you wish the broadcast to go by text message, email, or both.

**Creating Broadcast**

No mailing distribution list selected ~  
Event Date: 12/04/2025

Broadcast Date (mm-dd-yyyy)  
11-03-2025

\* Time to send (Current time: 12:43:23 -0700)  
8:00 AM

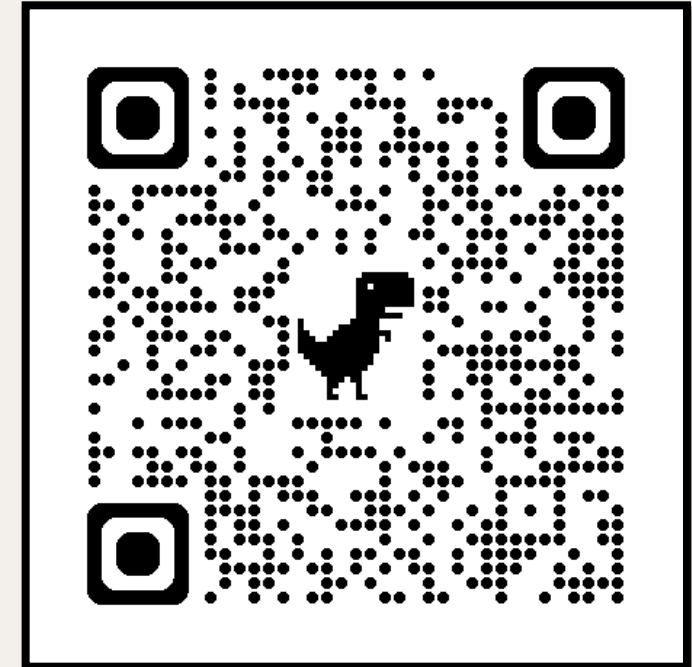
Select type of messages you want to send with this broadcast

Text messages (0 subscribers)

Entered Apprentices (3)

Emails (20 subscribers)

Schedule broadcast Back



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# Plan and Promote Events

27

Click the "Schedule Broadcast" button.

**Creating Broadcast**

~ No mailing distribution list selected ~  
Event Date: 12/04/2025

Broadcast Date (mm-dd-yyyy)  
11-03-2025

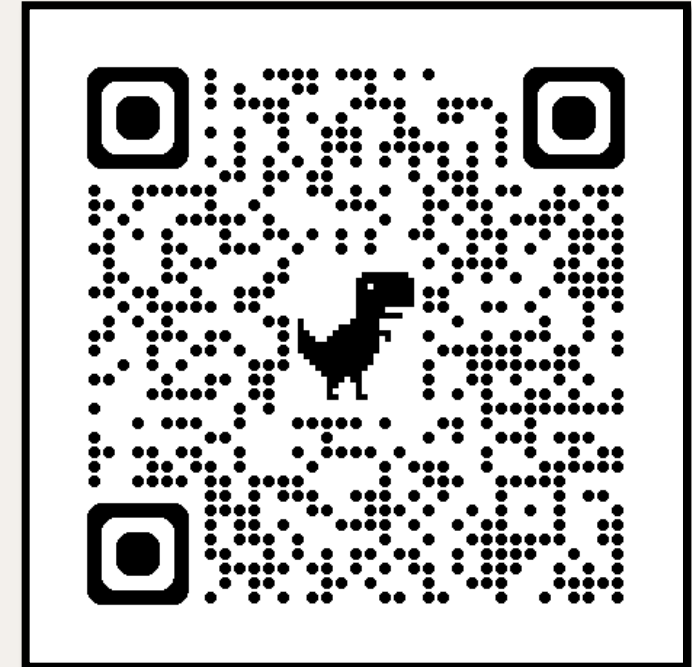
\* Time to send (Current time: 12:43:23 -0700)  
8:00 AM

Select type of messages you want to send with this broadcast

Yes  Text messages (0 subscribers)

Yes  Emails (20 subscribers)

**Schedule broadcast** Back



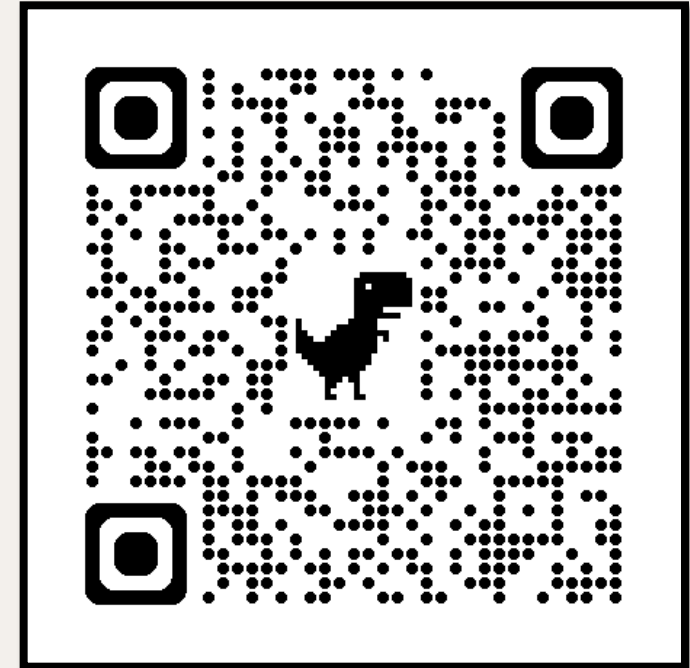
Scan to download a  
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# Plan and Promote Events



The Grand Master has included in his budget unlimited free emails from iMember, and once monthly text messages (or robocalls) through iMember to your members.

After that text messages or robocalls are \$0.05 a message and are billed on your per capita statement.



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# Plan and Promote Events

28

Click "Quick Check In" to help register members at the event.

**Event Details**

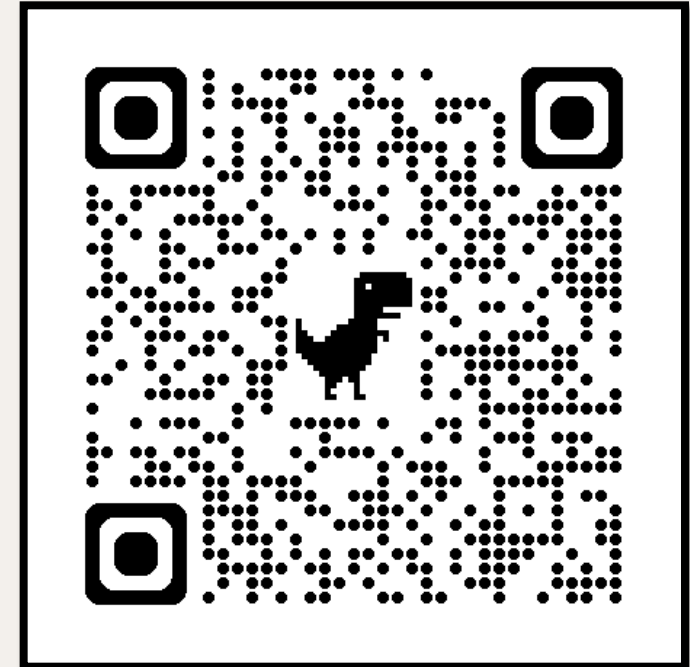
Event Type: Installation of Office

\* Event Name: Installation of 2026 Officers

Date/Time: \* Start Date (mm-dd-yyyy): 12-04-2025, End Date (mm-dd-yyyy): 12-04-2025  
\* Start Time: 7:30 PM, End Time: - Select an End Time

Dress Code: Black Tie (Tuxedos)

Description: **B** *i* U **A:** [Text Formatting Icons]  
Join us for the **Annual Installation of Officers**, a cherished tradition where we welcome the newly elected and appointed leaders of our lodge. This formal ceremony honors their



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# Communication tips

# Communication Tips



USE SUBJECT LINES  
THAT MAKE SENSE.

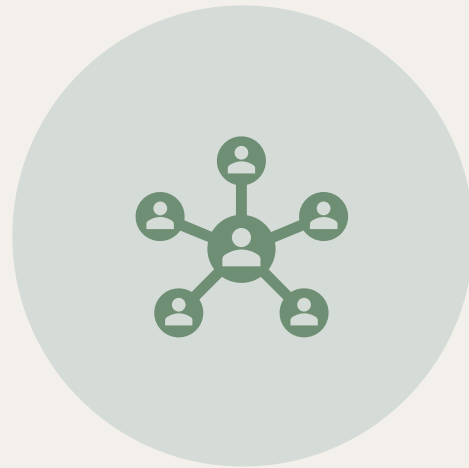


STICK TO PLAIN  
LANGUAGE.



SCHEDULE REGULAR  
TOUCHPOINTS.

# Be the Friendly Voice of the Lodge



COMMUNICATE LIKE A  
PERSON, NOT A POLICY.



PAIR DIGITAL TOOLS WITH  
WARMTH.

# Questions to Ask Your Members



What's your favorite memory from lodge?



What keeps you from coming more often?



What do you wish we did more of?

# Support Options



## **MEMBER SERVICES**

415-292-9180

[memberservices@freemason.org](mailto:memberservices@freemason.org)



## **SECRETARY'S ASSOCIATION MEETINGS**


**Today's handouts  
and more**

2



Feed

1



Events



My Profile



Virtual Card



Education



Grand Lodge



Grand Lodge Recognition



Member Search



Find Meetings



Lodge Locator



Resources



Rituals




Leadership Retreats - REGISTER NOW!

2




Feed


1




Events



My Profile



Virtual Card




Education



Grand Lodge




Grand Lodge Recognition



Member Search



Find Meetings



Lodge Locator



Resources



Rituals



Leadership Retreats - REGISTER NOW!

## General Resources

### General Reference Documents and Resources

[California Masonic Code and Edicts](#)  
[Proceedings Archives](#)  
[2025 Fraternity Plan](#)  
[Masonry in California Map](#)  
[Grand Lodge Staff](#)  
[Recognition of Foreign Grand Lodges](#)  
[Directory of Resources](#)

### Grand Master's Information

[Grand Master Biography, Logo, Photo and Other Information](#)

### Ritual and Ceremonies

[Monitor and Officer's Manual](#)  
[Officer Installation](#)  
[Degree Planning](#)  
[First Degree Lecture Slides](#)  
[Third Degree Lecture Slides](#)  
[Funeral Service](#)  
[50 Year Golden Veterans Award Ceremony](#)  
[Music](#)  
[Costumes, White Gloves, Chamber of Reflection, and Other Ritual Practices](#)  
[Book of Ceremonies](#)



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**General Resources**



**Master Mason**



**Lodge Administration**



**Finance**



**Hall Resources**



**Warden**



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General Resources



Master Mason



Lodge Administration



Finance



Hall Resources



Warden



## General Resources

## Master Mason

## Lodge Administration

### Applications, Demits, Certificates of Standing, and Related Notices

[Applications For Degrees and Affiliation](#)

[Demit and Discontinuance of Multiple Membership](#)

[Certificates of Standing](#)

[Other Notices](#)

### Applicant Character Investigation

[Character Investigation Guides and Forms](#)

### Uniform Bylaws and Bylaw Amendments

[Uniform Code of Bylaws](#)

[Resolutions to Amend Bylaws](#)

[Certificates of Bylaw Amendments](#)

### Dispensations

[Dispensation Forms](#)

Masonic Information Night Resources

Prospecting Resources

## **Membership Retention Committee**

Member Retention Resources

## **Miscellaneous Reports and Forms**

Secretary Annual and Semi-Annual Reports

Visitor Information Form

Lodge Annual Financial Reports

Partial Remission of Dues Form

Supply Order Form LAFSCO

## **Surveys**

Lodge Surveys for Members

## **Manuals and Guides**

Lodge Planning Guides

Consolidation Manual

Meeting Minutes Templates

Secretaries iMember Instruction Sheets

## **Widows**

Resources for Widows Programs and Recognition

## **Travels**

Letter of Introduction

Masonic Information Night Resources

Prospecting Resources

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Letter of Introduction

# Resource Group: Manuals and Guides

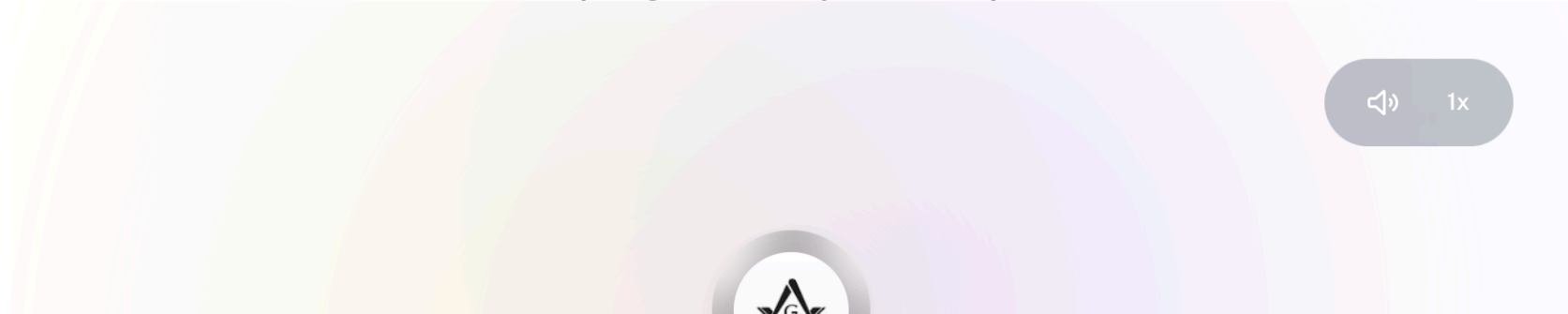


## Secretaries iMember Instruction Sheets











This folder contains step-by-step guides to assist Lodge Secretaries and Assistant Secretaries with key administrative tasks in iMember. Each instruction sheet provides detailed, easy-to-follow steps on processes such as entering applications, processing dues payments, submitting reports, updating member records, and more. Many of these tasks align with the annual lodge calendar to help you stay ahead of important deadlines. Where applicable, links to video walkthroughs are also included for additional support. These resources are regularly updated, and you are encouraged to reference them as needed. If you have any questions, please contact Member Services for assistance at [memberservices@freemason.org](mailto:memberservices@freemason.org) or (415) 292-9180.

- February** - Preparing the Secretary's Annual Report
- March** - Entering an application and changing a candidate status
- April** - How to file a notice of intent to suspend
- May** - Adding prospects and notes in iMember
- June** - How to review and download your per capita assessment
- August** - Preparing the Secretary's Semi-Annual Report
- September** - How to create a newsletter announcement
- November** - How to enter an election and install officers
- December** - How to process payments for members owing dues, including remissions and adjustments

### Preparing the Secretary's Annual Report



## Files / Attachments

- Adding prospects and notes in iMember  
- Entering an application and changing a candidates status  
- How to create a newsletter announcement  
- How To Process Payments For Members Owing Dues, including remissions and adjustments  
- Prepare the Annual or Semi-Annual Secretary Report  

# Resource Group: Manuals and Guides













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# Prepare the Annual or Semi-Annual Secretary' Report

10 Steps | 33 seconds











 Freemason




Made with 



Entering an application and changing a candidate status

How To Process Payments For Members Owing Dues, including remissions and adjustments	 
Prepare the Annual or Semi-Annual Secretary Report	 
How to file a notice of intent to suspend	 
How to enter an election and install officers	 
How to review and download your per capital assessment	 

**NOTE:** use the download link  to download fillable PDF forms.

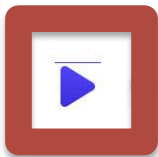
This saves the file to your computer so you can complete the form and save your changes.



# Prepare the Annual or Semi-Annual Secretary' Report

10 Steps | 33 seconds

 Freemason




Step 0 of 10







Made with **Scribe**







Entering an application and changing a candidate status


How To Process Payments For Members Owing Dues, including remissions and adjustments  

Prepare the Annual or Semi-Annual Secretary Report  

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**NOTE:** use the download link  to download fillable PDF forms.

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# Prepare the Annual or Semi-Annual Secretary' Report

10 Steps | 33 seconds

 Freemason



Step 0 of 10



Made with 



Entering an application and changing a candidate status

How To Process Payments  
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Prepare the Annual or  
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Report



How to file a notice of  
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and install officers



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download your per capital  
assessment



**NOTE:** use the download link  to  
download fillable PDF forms.

This saves the file to your computer so  
you can complete the form and save  
your changes.

Q&A

# Q&A

What tool are you most excited to try?

# Let's keep in touch

## Member Services



[memberservices@freemason.org](mailto:memberservices@freemason.org)



(415) 292-9180