

SENTINEL VERSION 2 TRAINING MANUAL

SENTINELV2 TRAINING MANUAL

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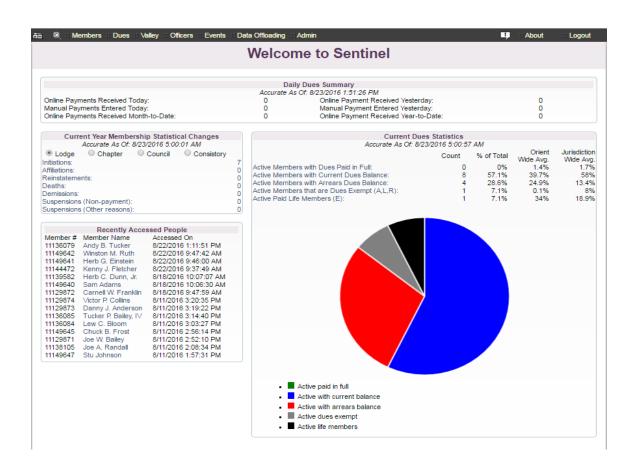
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CHAPTER 1: WELCOME TO SENTINEL SCREEN

The **Welcome to SentinelV2** screen is new in Sentinel.V2. This is the first screen that you will see when you log in to your Valley's database. The purpose of the screen is to give you a quick view of your Valley's statistics without performing a member search.

Here is an example of a typical Welcome to Sentinel screen. Notice that there are three major sections:

- Daily Dues Summary
- Current Year Membership Statistics
- Current Dues Statistics
- Recently Accessed People



There is a lot of information on the Welcome to Sentinel screen, so let's break it down into sections.

DAILY DUES SUMMARY

The **Daily Dues Summary** displays a total count of online and manual dues payments occurring during a day, month, or year. Online payments are any credit card payments processed through the Membership Portal at <u>www.ScottishRite.org</u> or any credit card payment entered by a Valley user directly into Sentinel. Manual dues payments are check and cash payments entered by a Valley user directly into Sentinel.

You can click on each option to view a list of the members who paid and to create a report.

Daily Dues Summary					
Accurate A	s Of: 8/23/2016 1:56:14 PM				
0	Online Payment Received Yesterday:	0			
0	Manual Payment Entered Yesterday:	0			
4	Online Payment Received Year-to-Date:	66			
		Accurate As Of: 8/23/2016 1:56:14 PM 0 Online Payment Received Yesterday: 0 Manual Payment Entered Yesterday:			

CURRENT YEAR MEMBERSHIP STATISTICAL CHANGES

The **Current Year Membership Statistical Changes** displays a point-in-time total count of membership updates during the current statistical year by Lodge, Chapter, Council, and Consistory. A "statistical year" does not coincide with a "calendar year." Statistical change processing for a current year does not begin until February 1 of that year.

A "Statistical Year" runs from February 1 through January 31 This system is based on the dues payment schedule which has December 31 as the final due date for the next year's dues. For example, **2017** dues are due by December 31, **2016**. Members owing more than one year's dues are subject to suspension in accordance with the *Statutes of the Supreme Council*. Therefore, Valleys report their end-of-year suspensions during the month of January. As a result, the full month of January is needed to process all of these Valley suspensions and prepare the previous year's Annual Report, which in our example would be the 2016 Annual Report.

Current Year Membership Statistical Changes Accurate As Of: 8/23/2016 5:00:01 AM				
Lodge Chapter Council Consistory				
Initiations:				15
Affiliations:				
Reinstatements:				8
Deaths:				29
Demissions:				6
Suspensions (Non-payment):			0	
Suspensions (Oth	Suspensions (Other reasons):			

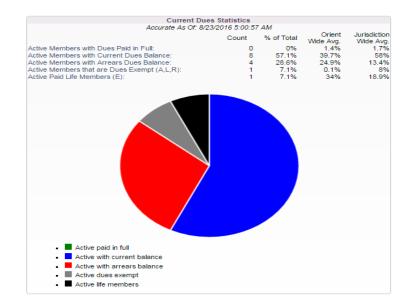
RECENTLY ACCESSED PEOPLE

Recently Accessed People displays a list of member records for any member **Profile** screen that the user has recently viewed. You can click on a name to go directly to that member's record without performing a search.

	Recently Acces	ssed People
Member #	Member Name	Accessed On
11136079	Andy B. Tucker	8/22/2016 1:11:51 PM
11149642	Winston M. Ruth	8/22/2016 9:47:42 AM
11149641	Herb G. Einstein	8/22/2016 9:46:00 AM
11144472	Kenny J. Fletcher	8/22/2016 9:37:49 AM
11139582	Herb C. Dunn, Jr.	8/18/2016 10:07:07 AM
11149640	Sam Adams	8/18/2016 10:06:30 AM
11129872	Carnell W. Franklin	8/18/2016 9:47:59 AM
11129874	Victor P. Collins	8/11/2016 3:20:35 PM
11129873	Danny J. Anderson	8/11/2016 3:19:22 PM
11136085	Tucker P. Bailey, IV	8/11/2016 3:14:40 PM
11136084	Lew C. Bloom	8/11/2016 3:03:27 PM
11149645	Chuck B. Frost	8/11/2016 2:56:14 PM
11129871	Joe W. Bailey	8/11/2016 2:52:10 PM
11138105	Joe A. Randall	8/11/2016 2:08:34 PM
11149647	Stu Johnson	8/11/2016 1:57:31 PM

CURRENT DUES STATISTICS

Current Dues Statistics displays the statistics for paid, unpaid, and exempt members. Each option in the list is a clicable link that will display the names associates with each category. The pie chart provides a visual image of the statistics.



CHAPTER 2: THE SENTINELV2 MENU BAR

The SentinelV2 **Menu Bar** displays at the top of the SentinelV2 window. The menu options vary depending on the type of user account that you have. Sentinel Valley Administrators will see the "Admin" tab while all other permission level users will not.

|--|

Clicking the house icon will always return you to the **Welcome to Sentinel** page. The remaining menu options will be explained in the following sections.

THE HOURGLASS SEARCH (LOLLIPOP)

The Hourglass icon commonly referred to as the "Lollipop," is your member quick search function. This search will return results quickly, but it is not intended as a means to create reports. For reports you will need to use **Search Members** which is located under the **Members** tab.

To perform a 'Lollipop' search, click the Lollipop to open the search box and type in a name or member number. For this example, the user has typed in the name "Tucker," and Sentinel has returned all members, active or inactive, who have "Tucker" in their name. Click on the desired name to view the member's complete record.

na 🔍 🗈	Members Dues Valley Officers Events Data Offioading	Admin 🧾 🗉 About
Search: to	icker	Allow results to include dec
	Bailey, Tucker Princeton, 32° Membership Number: 11136085	Active 🔺
	777 Lucky Lane, Rockville, MD 20754 Phone : 333-444-5555, Email Address: scott@patriotsoftware.net	Dues Balance: \$130.00 Dues Status: Normal, Dues Type: Regular Dues
Online Pa Manual F		Inactive
Online Pa	87 Williams St #78, Longs, SC 29568 Phone : 843-908-5434, Email Address: No Email On File	Dues Balance: \$0.00 Dues Status: Normal, Dues Type: Regular Dues

The Lollipop search responds to keystrokes. It will not function correctly when a number or name is pasted into it

The Lollipop search returns results for both active and inactive members with the exception of deceased members. If you want deceased members returned in a search, check the box on the upper right side of the screen that says, "Allow results to include deceased members.



CHAPTER 3: THE MEMBERS TAB

Click the **Members** tab to display the menu.

a 🔍	Merchers Dues Valley Officers Events	Da	ta Offloading	Admin
	Search Members		Welco	mo t
	Add New Person		VICICO	me t
	Form 330s		Da	aily Dues
0 F	Statistical Change History		Accurate /	As Of: 8/2.
Online Manua	Sojourner Search		0	
Online	Valley Archived Reports		0	Y
\sim	Supreme Council Reports		-	
• Lo	Accurate As Of: 8/23/2016 5:00:01 AM dge Chapter Council Consistory			
Initiatio Affiliatio Reinsta Deaths	ons: atements:	7 0 0	Active Memi Active Memi Active Memi Active Memi	bers with (bers with /

The following sections will explain the Members tab menu options in detail.

SEARCH MEMBERS

Search Members is located on the Members tab on the main SentinelV2 menu.

1. Click on **Search Members** to Display the submenu.



2. Click on New Ad-Hoc Search to display the search screen.

🙃 🍭 Members Dues Valley Officers Events Data Officading Admin	📫 🗰 About 💠 Logout
People Search - Please provide your search criteria	Clear All Fields Search
Member Status Information - Simplified Version	Collapse
Use Expert Version	
Valley Status: ?	
Valley Status On:	
Membership Type:	
Membership Type On:	
Only show members that are: All (No Restrictions) •	
Effective On:	
Per-Capita Exemption Status:	
Member Dues Summary	Collapse
Dues Status:	Collapse
Dues Type:	
Current Year Total Paid:	
Current Year Due Balance:	
Past Due Balance:	
Total Balance Due:	
Death Date	Expand
Primary Address	Expand
Telephone Numbers	Expand
Birth and Degree Dates	Expand
Email Addresses	Expand
General Demographics	Expand
Valley Last Modification Timestamp	Expand
Supreme Council Last Modification Timestamp	Expand
Alternate Address 1	Expand
Alternate Address 2	Expand
Job Information	Expand
Blue Lodge Information	Expand
Offices Held	Expand
Charitable Gifts	Expand
Member Journal	Expand
User Defined Fields	Expand

This is your all-purpose **Simple Search** screen. Notice that you can expand and collapse the various search categories. The top two are the most used, so they are designed to remain open by default, but you can manually collapse them.

Take a look around the search screen. Expand and collapse the different categories to get a feel for the way it works and to familiarize yourself with the many search options. Every field on the s screen is searchable, and you can combine searches among as many categories as you need.

Say for instance that you wanted to email all of your active members who were born between 1950 and the present date, you would set up your search this way:

1. Under **Member Status Information - Simplified Version,** set "only show members that are" to "Active Members Only." You can collapse the top category, **Member Name Information**, because it is not needed for this search.

Member Name Information Expand					
Member Status Information -	Simplified Version Collapse				
Use Expert Version					
Valley Status:	?				
Valley Status On:					
Membership Type:	?				
Membership Type On:					
Only show members that are:	Active Members Only				
Effective On:					
Per-Capita Exemption Status:	T				

 Under the Birth and Degree Dates category, use the > symbol to tell the system to locate all members who were born from 1950 to the present date. The correct syntax is >1949. You can also perform the same search by entering a date range as in 01/01/1950-MM/DD/YYYY where you would fill in the appropriate end date. However, >1949 is much easier.

Birth and Degree Dates		Collapse
Birth:	>1949	
14°:		
400.		

3. In the **Email Address** category, type "is not blank" in the email search field. "is not blank" tells SentinelV2 to look for members who have an email address in their record.

Email Addresses			Collapse
Email Address:	is not blank		

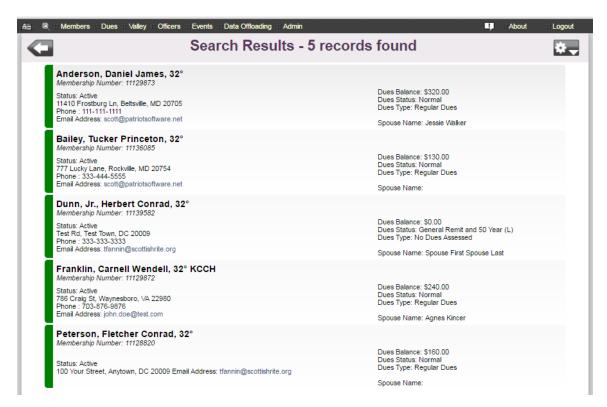
Your completed search should have the following criteria entered. Notice how we have selected from multiple categories.

	Allow deceased members to be included in the search	ch results
Member Name Informa	tion	Expand
Member Status Inform	ation - Simplified Version	Collapse
Use Expert Version		
Valley Status:	?	
Valley Status On:		
Membership Type:	?	
Membership Type On:		
Only show members that are	Active Members Only	
Effective On:		
Per-Capita Exemption Status	к т	
Member Dues Summar	y	Expand
Death Date		Expand
Primary Address		Expand
Telephone Numbers		Expand
Birth and Degree Date	5	Collapse
Birth:	>1949	
14°:		
18°:		
30°:		
32°:		
33°:		
KCCH:		
GC:		
Email Addresses		Collapse
Email Address:	is not blank	
General Demographics		Expand

4. To display your results, click the **Search** button in the upper right corner of the screen.

 Image: Book of the second s

Your search results screen will display in the following format.



From this results screen you can click on a name to view that member's details and scroll back and forth among the entire list of member records included in the results. You can also email all of your members, or create a report.

SCROLLING THROUGH RECORDS

Click on the first name in your list to display his member record. To go to the next record, use the backward and forward arrows located at upper right corner of the screen.



There were five results in my search, so Sentinel will display "1 of 5" or "2 of 5" and so forth depending on which record is displayed on the screen.

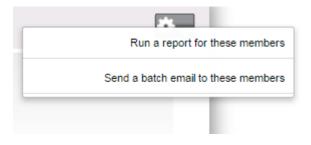
EMAILING A GROUP OF MEMBERS

Once you have your search results displayed on the screen as in the figure above you can send each member an email from within SentinelV2.

1. Click the gear in the upper right corner to open the menu.



3. Click the option to Send a batch email to these members.



4. The email form will open with the name and email address that is recorded in your SentinelV2 user account. Fill in the body of the message and click **Send Email Blast Now.**

Please note	You are creating an email blast for all members within your selected set of reco Anyone without an email address will automatically be skyped. that all Sentinel delivered emails will come from the address donotreply@scottishrite.org rather than you name will appear as the from name. This is because of reasons related to spam filters or	ur personal email address. However.
To:	All 5 members in your current result set that have an email address	Send Email Blast Nov
From Email Address: From Name:	donotreply@scottishrite.org	
-rom Name: Subject:	Tamera Fannin	
Tamera Fannin tfannin@scottishrite √alley of Test √alley	org	
tfannin@scottishrite	org	

SAVING A SEARCH

Once you have completed your search, you can save the search criteria so that it can be used again in the future. This comes in handy if you have a search that you perform on a regular basis. It is important to point out that SentinelV2 does not save the results (names on the list) of the search; the system saves the criteria that you entered to arrive at the results.

Let's see how this works. For example, we want to create a list of all 33° members who are unpaid, and we want to run the report each week.

1. First, enter the search criteria by creating a **New Ad-Hoc Search**. **The New Ad-Hoc Search** link is located on the **Members>Search Members** submenu.

Members ⊞Dues Walley ⊞Officer	s ⊞Events ⊞Online Forms ⊞Data Offloading
III Search Members	III New Ad-Hoc Search
III Add New Person	33rd Degree Members
III Form 330s	##50 Year Members
Statistical Change History	Deceased Members
III Sojourner Search	#KCCH Members

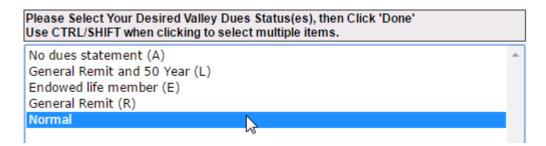
- 2. Click New Ad-Hoc Search to open the search screen. Under Member Status Information, select Active Members Only from the dropdown list.
- 3. Open Member Dues Summary by clicking the Expand button.

Member Dues Summary	Expand	

4. We are looking for dues-paying members (Dues status Normal), so click the question mark to display the menu.

Member Dues Summary	Collapse
Dues Status:	
Dues Type:	- ?

Select "Normal " from the list.



5. Click the **Done** button.

6. We are looking for 33° members who have a balance due of greater than zero, so enter >0 in the Total Balance Due field.

Your Member Dues Summary search should look like this:

Member Dues Summary		Collapse
Dues Status:	Normal	?
Dues Type:		- ?
Current Year Total Paid:		
Current Year Due Balance:		
Past Due Balance:		
Total Balance Due:	>0	

7. Next, tell the system that you want to search for 33³ members only. Open **Birth and Degree Dates** by clicking the Expand button.

Birth and Degree Dates Expand

8. Type "is not blank" in 33° field. Every 33° member has a Degree date in this field. By typing, "is not blank," you are telling the system to look for any member records that has a date in this field.

Birth and Degree Dates	Collapse
Birth:	
14°:	
18°:	
30°:	
32°:	
33°:	s not blank

9. All of the search criteria are entered. Let's review. We want all active members who are 33°, normal dues-paying members with a balance due of greater than zero.

Member Status Info Use Expert Version	rmation - Simplified Version Collapse
Valey Status:	2
Valey Status On:	
Membership Type:	2
Membership Type On:	
Only show members that are:	Active Members Only
Effective On:	
Per-Capita Examplion Status:	•
Mamber Pust France	Collapse
Member Dues Summ Dues Status:	Normal [2]
Dues Type:	
Current Year Total Pakt:	
Current Year Due Balance:	
Past Due Balance:	
Total Balance Dus:	>0
Death Date	Expand
Primary Address	Expand
Telephone Numbers	Expand
Birth and Degree Da	tes Collapse
Birth	
141)	
181	
301	
321	
331:	is not blank
KOCH	
GC:	

10. This is the tricky and confusing part. You will need to run the search before you can save it.

Click the **Search** button.

People Search - Please provide your search criteria		Clear All Fields Search	
After the results display on the screen, click the Back button.			
Search Results - 3 record	s found	÷.,	
James Allen, 33° Membership Number: 9787961 Status: Active 41785 109th St. Britton, SD 57430-5512 Phone : 605-448-5401 Ray Gerald, 33° Membership Number: 2783124 Status: Active 38635 129th St. Aberdeen, SD 57401-8160	Dues Balance: \$ <mark>50.00</mark> Dues Status: Normal Dues Type: Regular Dues Spouse Name: Dues Balance: \$50.00 Dues Status: Normal Dues Status: Normal		
Phone : 605-228-1383 Bruce Allen, 33° Membersnip Number: 3584653 Status: Active 105 Linden St, Langford, SD 57454-2128 Phone : 605-209-6055 Email Address: bjikness@venturecomm.net	Spouse Name: Dues Balance (\$100.00 Dues Status: Normal Dues Type: Regular Dues Spouse Name:		

11. Now you have the Save Search Criteria button at the top of the screen. To save the above search criteria for future use, click the **Save Search Criteria** button at the top of the screen.

ள்ட	
People Search - Please provide your search criteria	Save Search Criteria Clear All Fields Search

12. The Save Search window opens. Give your search a name. If you want to allow other SentinelV2 users in your Valley to use your saved search, click the **Share my search** checkbox. The search will then appear on their **New Ad-Hoc Search** menu.

Click the **Save** button.

		Save/Update Search Criteria	
1	a name for the sear again.	teria you used to create a search for later retrieval and use ch criteria below, you can retrieve this critera later and exer whare my search", other users in your valley will be able to a a set as well.	ute this search
Search i Share m	name: ny search:	33rds with Balance Due	
		Sa	Cancel

13. Your search is saved and you are returned to the original search. Click the **Search** button at the top right of the screen.

People Search - Please provide your search criteria	People Search - Please provide your search criteria	Clear All Fields Search
-----------------------------------------------------	-----------------------------------------------------	-------------------------

14. SentinelV2 displays the result list:

-	Search Results - 3 records found	*-
James Allen, 33° Membership Number: 9787961 Status: Active 41785 109th St, Britton, SD 57430-5512 Phone: 605-448-5401		
Ray Gerald, 33° Membership Number: 2783124 Status: Active 38635 129th St. Aberdeen, SD 57401-8: Phone : 605-228-1383	Spouse Name: Dues Balance: \$50.00 Dues Status: Normal Dues Type: Regular Dues Spouse Name:	
Bruce Allen, 33° Membersnip Number, 3584653 Status: Active 105 Linden St. Langford, SD 57454-212 Phone : 605-290-8055 Email Address: bjlikness@venturecomm	Dues Balance: <mark>\$100.00.</mark> Dues Status: Normal Dues Type: Regular Dues	

Notice that they are all active 33° with a balance due. (Last names have been purposefully removed)

15. Now, it is a week later, and you want to see if any of them have paid their dues during the past week. You do not have to setup the search all over again. Sentinel has stored the search on the **New Ad-Hoc Search** menu. If you did not share the search, only you have this option on the menu. If you shared the search, all users in your Valley will see it on their menu.

Members Dues Valley Officers Eve	nts ⊞Online Forms ⊞Data Offloading ⊞Valley Admin
Search Members	₩ New Ad-Hoc Search
III Add New Person III Add New Person III Add New Person III Add III III III III III III III III	#33rds with Balance Due (My saved search)
₩ Form 330s	#33rd Degree Members
Statistical Change History	#50 Year Members
III Sojourner Search	# Deceased Members
Walley Archived Reports	#KCCH Members

16. Simply click on **33rds with Balance Due** to run the search. The usual search window will open with all your search criteria already filled in. If you want to edit the search criteria, click the **Update Saved Criteria** button; otherwise, click the **Search** button.

People Search - 33rds with Balance Due	Update Saved Criteria	Clear All Fields	Search

17. One week later, there are now only two unpaid 33° members.

Search Results - 2 records found						
Ray Gerald, 33° Membership Number: 2783124	Dues Balance: \$50.00					
Status: Active 38635 129th St, Aberdeen, SD 57401-8160 Phone : 605-228-1383	Dues Status: Normal Dues Type: Regular Dues Spouse Name:					
Bruce Allen, 33° Membership Number: 3584653						
Status: Active 105 Linden St, Langford, SD 57454-2128 Phone : 605-290-8055 Email Address: bjlikness@venturecomm.net	Dues Balance: <mark>\$100.00</mark> Dues Status: Normal Dues Type: Regular Dues Spouse Name:					

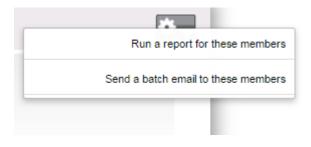
CREATING A REPORT BASED ON SEARCH RESULTS

Once you have completed your search, and the search results are displayed on the screen, you can create several different types of reports.

1. On the **Search Results** screen, click the gear in the upper right corner of the Sentinel screen.



2. Click the option to Run a report for these members.



3. The Reports and Data Extracts screen will open.

embers Dues Valley Officers Even	ts	Liji ⊞ About							
Reports and Data Extracts									
The set of records you have currently selected may be reported or extracted using the options below. Select the extract or report that best fits your needs.									
All fields pertaining to members	System	Member Dues Information							
Member address details only	System	Member Directory Listing							
		Degree Date Listing							
		Member Dues Notices							
		Blue Lodge Information Listing							
		4 x 6 Postcards							
		- or - Donation Report by Fund							
		Donation Report by Member							
		Registration Check-In Sheet							
		Registration Report							
		Labels Reports (1 report)							
		People Label (Avery 5160 Laser Label)							
		Envelope Reports (2 reports)							
		Envelope Reports (2 reports) Envelopes - Landscape Format							

The extract menu is displayed in the left column and the predefined reports are displayed in the right column. You have two options under **Select Desired Extract from the List**: **All fields pertaining to members** and **Member address details only**. Clicking on either of these options will open a screen to display a list of information which will allow you to build your own report by selecting the information topics that you want presented in your report. All fields pertaining to members is a long list which provides every field option in sentinel.

Select Desired Extract From	The List
Extract Name	Owner Edit
All fields pertaining to members	System
Member address details only	System

Member address details only is a short list to be used if you only need member names and addresses. This search allows you to extract this information without selecting from a long list.

Select Desired Extract From The List		
Extract Name	Owner	Edit
All fields pertaining to members	System	
Member address details only	System	

In the right column on the Reports and Extracts screen you are given a list of predefined reports from which to make a selection. You do not have to build these reports; Sentinel has created them for you. Make you selection by clicking on the report name.

Select Desired Report From The List

```
Listing Reports (10 reports)
      Member Dues Information
      Member Directory Listing
      Degree Date Listing
      Member Dues Notices
      Blue Lodge Information Listing
      4 x 6 Postcards
      Donation Report by Fund
      Donation Report by Member
      Registration Check-In Sheet
      Registration Report
Labels Reports (1 report)
      People Label (Avery 5160 Laser Label)
Envelope Reports (2 reports)
     Envelopes - Landscape Format
      #10 Envelopes
```

ADD NEW PERSON

Add New Person is located on the Sentinel menu under Members. You will use this person to add both initiation Candidates and nonmember records. An example of a nonmember record would be a Blue Lodge or a widow whom you want to add to your mailing list.

Adding a new Candidate is the first step in reporting your new members to the Supreme Council on a Form 330. Follow these instructions for adding a new Candidate for initiation.

- 1. Click **Members** on the black Sentinel menu bar and then click **Add New Person.**
- The Add New Person screen will open. The Valley Status will always display "Candidate" as the default. When adding a new member, do not change this status or Sentinel will not recognize your new entry as a Candidate for initiation.

IMPORTANT! When adding an Initiate, do not change the Valley status from "Candidate."

nia 🍭 🛚 N	Members	Dues	Valley Officer	s ∷Even	ts ∷⊡Dat	a Offloading	Admin							III Logout
					Add	a per	son/c	andida	ite					Save
Member Na	ame Info	rmation	1											
Prefix:		•	First:			Midd	le:	10	No Mic	idle Name	Last			
Nickname:			Mailing Name								Suffi	K:	•	
Valley Status	Candidat	te 🔻 🤇	on 9/3/2016			Birth Da	te/Birth Plac	e: mm/dd/yy	/уу	/				
Primary Ad	Idress		(Va	lidate Ad	ldress)	Job Infor	nation				Lodge In	forma	ation	
Туре:		Home 🔻		_		Employer:					Name:			
Status:	-	Good	•]		Job Title:					Number:			
Country:		USA		•		Job Status:		•		_	City:			
Line 1:						Job Code:				•	State:		•	
Line 2:						Line 1:			_					
City:						Line 2:					Reunion Number:	Infor	mation	
State:		•				City,State:				•	Name:			
Zip Code:						Zip:								
County:	F					Country:				•	Telephon (At least o			
Change Code	e:	Original	Add		•						Home:	555-5	55-5555	
											Work:	555-5	55-5555	
											Cell:	555-5	55-5555	
Email Addr (Strongly Su 1:		۲	Preferred?	Si 1s 2n					okup) okup)	Spouse Na Spouse First Spouse Last	Name:			
2:			Preferred?		L					opoulo Edel	indino.			

Boxes on the Add Person/Candidate screen that are outlined in red identify information that is required by the system.

When adding a new Candidate, the boxes outlined in red are the minimum required by the system. You must enter information in these boxes or you will not be able to save your entry. However, in addition to the red boxes, please always enter as much information about the member as you have available.

Follow these instructions to add your new Candidate:

1. Add the **Member Name Information.** The prefix is optional. If your member has a middle name, please enter it. Our database contains many thousands of records. Middle names help identify members with common names such as Smith, Jones, Johnson, and so forth.

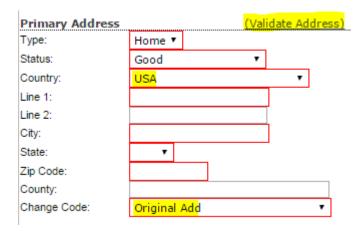
Add a person/candidate											
Member Na	ame Informat	ion									
Prefix:	-	First:	John	Middle:	Quincy		No Mide	dle Name	Last:	Mason	
Nickname:	John	Mailing Name:	John Q. Mason						Suffix:	•	
Valley Status	Candidate	on 9/3/2016		Birth Date/B	irth Place:	12/15/1	965	/ Baltimore	, MD		

If your member does not have a middle name, click the **no middle name** check box to turn off the restriction on the middle name.

- 2. Leave the **Valley Status** set to **Candidate**. The "Candidate on" date is set by the system. This does not represent the date that he will take his Degrees; rather, it is the date on which you entered his record into the system as a Candidate.
- 3. Next, enter the **Primary Address** information. The address **Type** will default to **Home**. You can click the downward area to open a **Type** menu to make another selection. The Country will default to USA. If you need to enter another country, click the downward arrow to the right of USA. It is important that you select the country before adding the address details as SentinelV2's screen will change to show the required fields for foreign addresses. Fill in the remaining fields and leave the **Change Code** set to **Original Add**.

IMPORTANT! When adding a foreign address, always choose the country before entering the address details. This action will remove the "state" requirement.

4. You can use **Validate Address** to validate your entry with the United States Postal Service and also to add the 4-digit subzip if you do not already have it.



5. Enter the Job Information. The Job Status and Job Code are required. However, please enter as much information as you have available. To choose a Job Status and Job Code, click the downward arrow to open the menu The Job Status options are "Current, Former, Retired and Other." Make your selection by highlighting one of these four options. The Job Code options job descriptions such as "Banking" or "Education." Make your section by highlighting a job description in the list.

Job Inforn	ation	
Employer:		
Job Title:		
Job Status:	•	
Job Code:	•	
Line 1:		
Line 2:		
City,State:	•]
Zip:		
Country:	•	

6. Enter the **Lodge Information**. All fields are required. To choose a state, click the downward arrow to display the list of states and US territories. Make your selection by highlighting a state.

If the Lodge is in a country other than the US, Choose N/A from the state list.

Lodge Ir	ifor ma	ntion	
Name:			
Number:			
City:			
State:		•	

7. Enter the **Reunion Information**. This information is not required by the system, but please enter the Number and Name if they apply.

Reunion	Informa	ation	
Number:			
Name:			

8. Enter the **Telephone Numbers**. Nowadays, many people only have a cell phone number, so all three fields are not required. Only one number is required by the system, and it does not matter which phone number you enter. However, if you have all three numbers, please add them.

To accommodate foreign phone numbers, there is no formatting restriction in the phone boxes, but please use the format shown (555-555-5555) for domestic numbers. Use whatever format is appropriate for foreign numbers. Notice that the numbers displayed are grayed.

Click in the box and type over 555-555-5555.

	ne Numbers one required!)	
Home:	555-555-5555	
Work:	555-555-5555	
Cell:	555-555-5555	

9. Enter the **Email Addresses**. Because some members do not have an email address, this information is not required, but as you can see below, it is "Strongly suggested" that you add available emails. If a

member has more than one email, you can enter a second. Identify the most used email address by clicking radio button next to **Preferred**. It is better to enter the **Preferred** email address first.

10. Enter the **Signers**. Do not type the signer's name directly into the box. Click on the **Lookup** link to open a search window. This is very important because this action links the new member's Sentinel record to his signers' records. This linked information is used when recognizing signers for awards.

Sig	ners	
1st:		(Lookup)
2nd:		(Lookup)

After you click **Lookup**, the search window will open. Enter the first and last name of the signer, and then click the **Find** button. Click the signers name to select it. If you are searching for a common name such as John Smith, you may have multiple results from which to select a name. Use the Member Number and Address to identify the correct signer.

		Close
Use th	e first and last name	fields below to find a member in your valley by name.
Last Name:	franklin	
First Name:	carnell	
-		Find
Member Number	Name	Address
11129872	Franklin, Carnell	786 Craig St, Waynesboro, VA 22980

When you click on the signer's name, SentinelV2 will automatically place his name in the Signer box. Follow the same instructions to add the 2nd Signer.

Sig	ners	
1st:	Carnell W. Franklin	(Lookup)
2nd:		(Lookup)

11. Add the **Spouse Name** (if applicable). Type the first and last name into the appropriate boxes.

Spouse Name		
Spouse First Name:	Janet	
Spouse Last Name:	Mason	

12. Now you are ready to save your new member addition. You entry should look similar to the figure below.

Click the **Save** button in the upper right corner.

ñ≣ ©(∷	Members	Dues	iii Valk	ey 💠 Officer	s ∷Ev	vents 💠 Da	ata Offloading	Admin						ų	About	I Logout
						Ado	d a per	son/ca	ndidate	Э						Save
Member N	ame Inf	ormati	on													
Prefix:		۲	F	rst:	Jo	ohn	Mide	dle: Quincy	🗆 No 1	Middle	Name	La	st: Ma	ason		
Nickname:	John		M	ailing Name	:]0	ohn Q. M	ason					Su	fix:	•		
Valley Status	Candida	ate 🔻	on 9/	3/2016			Birth D	ate/Birth Place: 1	2/15/1965	/ В	altimore	, MD				
Primary A	ddress			(Va	lidate	Address)	Job Infor	mation				Lodge I	nform	ation		
Туре:		Home	•				Employer:	University of	Maryland			Name:	Albert	: Pike		
Status:		Good		•			Job Title:	Professor				Number:	1			
Country:		USA				•	Job Status:	Current 🔻				City:	Bethe:	sda		
Line 1:		123 An	y Stree	et			Job Code:	Education		•		State:	MD		•	
Line 2:					1		Line 1:									
City:		Rockvil	le		1		Line 2:					Reunior Number:		mation		
State:		MD 🔻					City,State:	College Park		MD	•	Number. Name:	25 Albert	Pike Me	monial	_
Zip Code:		20009]			Zip:				_	Name.	Albert	PIKE ME	morrai	
County:		Montgo	mery				Country:	USA			•	Telepho				
Change Cod	le:	Origina	al Add			•						(At least Home:		<i>quired!)</i> 564-789	F	
												Work:		232-568	-	
												Cell:		564-321	-	
Email Add		0				Signers				- Sp	ouse Na		001 0	554 521	-	
(Strongly S			Dro	forrod?		1st: Carn	ell W. Frank	lin	(Lookup			Name: Jan	et			
1:JohnandJ 2:	anet@gm	an.con		ferred?		2nd: Sam	Adams		(Lookup) Spo	ouse Last	Name: Mas	on			

If you entered all of the appropriate information, SentinelV2 will display the following message at the top of the screen:

If you left out required information, SentinelV2 will not save your entry. You will see "Required" shown in red next to the missing information. Notice that the Blue Lodge Name and Number were not entered. The system displayed "Required" next to the boxes.

Lodge I	nform	ation	
Name:			Required
Number:		Required	
City:	Bethes	da	
State:	MD	•	

When you see "required", you will need to fill in this missing information and click **Save** again.

New Person Saved. If you need to go back and make edits to this person, use the normal person search area to find them and edit them now! DO NOT CLICK THE BACK BUTTON! You are now ready to add another person.

FORM 330: REPORT NEW INITIATES TO THE SUPREME COUNCIL

You will report your Initiates to the Supreme Council on Form 330. The form is located on the **Members** menu.

Before you can complete your Form 330, follow the instructions on pages 17-21, **Add New Person**, to add all of the Initiates that you want to include on the form.

. There are two types of Form 330:

- Form 330 for Initiates. Use this form if you are reporting at least the Lodge Degree—that is, a member who has never taken any degrees before now.
- Form 330 for Additional Degrees. Use this form if you are reporting members who have already taken at least the Lodge on a prior date and already have an existing SentinelV2 record. For instance, if a member received Degrees in the Lodge and Chapter in the Spring Class and is now taking the Chapter and Consistory in the Fall Class. Valleys that share members with other Valleys (split memberships) will use this form to report additional Degrees. In the past this had to be done manually on a paper Form 330.

The following sections will explain how to complete **the Form 330 for Initiates** and the **Form 330 for Additional Degrees** and submit the form along with your payment of fees to the Supreme Council, Office of the Grand Executive Director

CREATING A FORM 330 FOR INITIATES

Use this form if you are reporting at least the Lodge Degree—that is, a member who has never taken any degrees before now.

1. Place your mouse pointer on **Members** on the SentinelV2 menu bar. On the dropdown menu, place your mouse pointer on **Form 330**. Slide your mouse pointer to the right and click on **Form 330 for Initiates**.



2. The Candidates in Your Valley page will display the members that you have added as Candidates. The word, "Valid" next to each entry shows that you have entered all of the required information so that each member can be added to the form. If any members are displaying as "invalid," that you want to include on your Form 330, you will need go to the member's record and enter the missing information before you can begin the Form 330.

	There are 3 eligible candidates. There are 0 candidates selected for this form 330 submission.
	Optional processing note to be included in this form 330 submission:
Conway, Paul	Valid - Eligible for initiation Include in Form 330
Mason, John`	Valid - Eligible for initiation Include in Form 330
Smith, Charles	Valid - Eligible for initiation Include in Form 330

- 3. At the top of the **Candidates in your Valley** window there is a box labeled, "Optional processing note to be included in this form 330 submission." If you have a message that you want to bring to the attention of the Supreme Council staff, type the message in this box, and it will appear on your completed Form 330.
- 4. To add Initiates to the Form 330, click on **Include in Form 330**. The following window will open.

	Candidates in your Valley
	There are 3 eligible candidates. There are 1 candidates selected for this form 330 submission.
Pri	Optional processing note to be included in this form 330 submission: at 2017 cards for these members
Conway, Paul	Lodge Date:Chapter Date:Valid - Eligible for03/12/201603/12/2016initiationCouncil Date:Consistory Date:INCLUDED03/12/201603/12/2016
Mason, John`	Valid - Eligible for initiation Include in Form 330
Smith, Charles	Valid - Eligible for initiation Include in Form 330
-	Submit this Form 330

- 5. Enter the Degree dates as shown in the figure. Notice that we have added a note in the message box to "print 2017 cards for these members."
- 6. Paul Conway is now added to the Form 330 and is labeled "Included." Next, add John Mason by clicking on Include in Form 330. The system will automatically enter the Degree dates in the Degree boxes for John Mason. If you need to remove any of the dates or change the dates, click in the appropriate box/boxes and type in your date change. Continue adding members to the Form 330 in

this manner. You do not have to enter all "Valid" members. Enter only those whom you want to include on your Form 330.

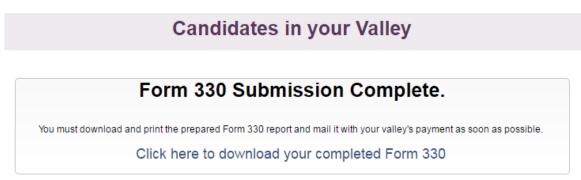
7. The sample completed page looks like the following:

		There are 3 eligible candidat ndidates selected for this form		
	Optional processi	ng note to be included in this	form 330 submission:	
	Print 2017 cards for th	nese members		
Conway, Paul		Lodge Date: 03/12/2016	Chapter Date: 03/12/2016	Valid - Eligible for initiation
		Council Date: 03/12/2016	Consistory Date: 03/12/2016	INCLUDED
Mason, John`		Lodge Date:	Chapter Date:	Valid - Eligible for initiation
		03/12/2016 Council Date: 03/12/2016	03/12/2016 Consistory Date: 03/12/2016	INCLUDED
Smith, Charles		Lodge Date:	Chapter Date:	Valid - Eligible for
		03/12/2016 Council Date:	03/12/2016 Consistory Date:	initiation INCLUDED
		03/12/2016	03/12/2016	

- 8. When you are finished adding Initiates, click **Submit this Form 330**.
- 9. Click OK to continue.

sentinelv2.scottishrite.org says:		×
Are you sure you are ready to submit this form	330?	
	ОК	Cancel

10. Click the link to download your completed Form 330.



Here is the completed form:

9/9/2016	Form 330 - Staten Valley of	Page 1 of 1			
	Lodge	Chapter	Council	Consistory	Fees
Paul Cecil Conway 11153192 567 Blair Road Albert Pike(1) Washington, DC Birth Date: 01/01/1900 Birth Place: Bethlehem, PA Print 2017 cards for these members	03/12/2016	03/12/2016	03/12/2016	03/12/2016	\$31.00
John' Quincy Mason 11153191 123 Any Town Albert Pike(1) Washington, DC Birth Date: 01/01/1900 Birth Place: Baltimore, MD Print 2017 cards for these members	03/12/2016	03/12/2016	03/12/2016	03/12/2016	\$31.00
Charles Franklin Smith 1153193 567 Trace Way Ubert Pike(1) Washington, DC Jirth Date: 01/01/1900 Jirth Place: Waco, TX 7/inf 2017 cards for these members	03/12/2016	03/12/2016	03/12/2016	03/12/2016	\$31.00
		٢	otal Fees Required	for this Form 330:	\$93.00

CREATING A FORM 330 FOR ADDITIONAL WORK

Use this form if you are reporting members who have already taken at least the Lodge on a prior date and already have an existing SentineIV2 record.

For this example we will use the membership record of Winston Morris Ruth who received the 14° and 18° on January 1, 2016. Now he has completed the 30° and 32°, and we want to report those Degrees using **Form 330 for Additional Work**.

1. Place your mouse pointer on **Members** on the SentinelV2 menu bar. On the dropdown menu, place your mouse pointer on **Form 330**. Slide your mouse pointer to the right and click on **Form 330 for Additional Work**.

Members Dues Valley Officers Eve	ents ⊞Data Offloading ⊞Admin
Search Members	Form 330 for Additional Wo
⊞Add New Person	onin 350 for Additional We
III Form 330s	III Form 330 for new initiates
Statistical Change History	#Form 330 for additional work

2. Enter his information in the form provided and click **Find Candidate**. For this example we are using "Test Valley." You will use your new member's actual Valley membership.

	Form 330 fo	or Additional Work
Û		bers to be reported on a Form 330 in the chapter, council or consistory. ge of Perfection, you should be using the regular Form 330 for initiates.
	First name:	Winston
	Last name:	Ruth
	Date of birth:	11/12/1950
	Lodge membership valley:	y: Test Valley
	F	Find Candidate

3. The Candidates name will appear on your screen. Click the green plus sign 🕈 to select the name.

(Current Valley	Member ID	Name	Preferred Address	Telephone	
	Test Valley	11149642	Ruth, Winston	555 Strike Out Ln, Towson, MD 28754	111-111-1111	÷

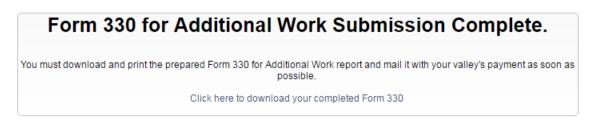
4. The Form 330 will open with the Lodge and Chapter dates already entered. Add the Council and Consistory dates.

		I	Members included in your re	port		
Member Number	Member Name	Lodge	Chapter Date	Council Date	Consistory Date	
11149642	Winston M. Ruth	Test Valley 1/01/2016 Initiate (D B C)	Test Valley 1/01/2016 Initiate (D B C)	Test Valley 10/12/2016	Test Valley 10/12/2016	۲
		Sul	bmit Form 330 Report (Additiona	al Work)		

- 5. If you are ready to report this member on Form 330, click **Submit Form 330 Report (Additional Work).** If you made a mistake and do not want to report this member, click the trash can at the right of the screen.
- 6. SentinelV2 will ask you if you are ready to submit the form. If yes, click OK.

sentinelv2.scottishrite.org says:			×
Are you sure you are ready to submit this form	1?		
	ОК	Cancel	

7. View and print your report by clicking **Click here to download your completed Form 330**. Print and mail your Form 330 along with the appropriate fees to the Supreme Council, 33°.



The completed Form 330 for Additional Work:

9/30/2016	Form 330 - Statement of Fees and Report of Investitures Valley of Test Valley in the Orient of US				
	Lodge	Chapter	Council	Consistory	Fees
Winston Morris Ruth			09/12/2016	09/12/2016	\$18.00
11149642					
555 Strike Out Ln					
Towson, MD 28754					
Pike(2) Waco, TX					
Birth Date: 11/12/1950					
Birth Place: Cumberland, MD					
Processed via Form 330 for addition	nal work				

Total Fees Required for this Form 330:

\$18.00

STATISTICAL CHANGE HISTORY

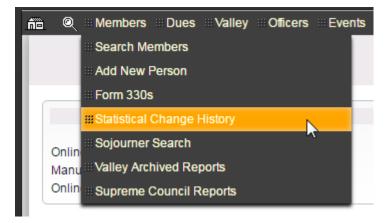
Statistical changes are defined as actions taken to change a member's current status, in particular, these are changes to reinstate, demit, suspend, or expel a member. You will perform a statistical change on the member's **Profile Screen**. Clicking the gear in the upper right corner of the Profile Screen opens the menu so that you can choose, "Request a statistical change for this member."

All statistical changes are reported electronically to the Computer Services staff of the Supreme Council where they are reviewed for accuracy and then applied to the member's record.

John Justin Revere	, 32°	
		Request a statistical change for this member
	John Justin Revere, 32° / Member ID: 11149639	Report this member as deceased
	Born on 1/21/1956 and is 60 years old \mathscr{P} Highest degree obtained is the 32° on 1/1/1900	Nominate this member for an honor
	Valley Status: Candidate 🖋	14th
	Spouse Name: 🖉	18th
	Childrone Namos: A	30th

Once you request a statistical change, the change will appear under **Statistical Change History** so that you can keep track of changes that are "Pending" or "Completed." If a change is "Pending," this means that the Computer Services staff has not yet reviewed the change. If the change is "Completed," this means that the Computer Services staff has finalized the change and updated the member's record in Sentinel to the requested status change.

To view pending and completed status changes, click **Statistical Change History** on the **Members** Menu.



You have the option to view **All** pending changes, **Pending** changes, or **Complete** changes by making a selection on the **Statistical Change Status** dropdown menu.

ña	Q =	Members :	Dues	:::Valley	iii Officers	🗄 Events 💠 Data	Offloading 💠 Adm	in
	Statistical Change History							
						Sele	ct Valley:	Test Valley ▼
						Statis	stical Change Statu	s: All
		Requested On	l val	ey	Status	Name	Change	All Pending Approval Complete
								Complete

Here is an example of a **Statistical Change History** screen showing both **Pending** and **Complete** status changes.

			Statis	tical Change History
			Select ∀a Statistica	alley: Test Valley I Change Status: All
Requested On	Valley	Status	Name	Change
11/29/2014	Test Valley	Complete	Herb C. Dunn, Jr.	CHANGE PREVIOUSLY COMPLETED Lodge: Affiliation (E G) as of 06/12/2013 to Demission (F) effective 11/29/2014 Chapter: Affiliation (E G) as of 06/12/2013 to Demission (F) effective 11/29/2014 Council: Affiliation (E G) as of 06/12/2013 to Demission (F) effective 11/29/2014 Consistory: Affiliation (E G) as of 06/12/2010 to Demission (F) effective 11/29/2014 Quick change request generated by Sentinel V2 user samartin.
9/21/2016	Test ∀alley	Pending Approval	Tucker P. Bailey, IV	Lodge: Initiate (D B C) as of 08/27/2012 to Demission (F) effective 09/21/2016 Chapter: Initiate (D B C) as of 08/27/2012 to Demission (F) effective 09/21/2016 Council: Initiate (D B C) as of 08/27/2012 to Demission (F) effective 09/21/2016 Consistory: Initiate (D B C) as of 08/27/2012 to Demission (F) effective 09/21/2016 Quick change request generated by Sentinel V2 user tfannin.
9/22/2016	Test Valley	Pending Approval	Sam Adams	Lodge: Initiate (D B C) as of 01/01/2016 to Expulsion (L) effective 09/22/2016 Chapter: Initiate (D B C) as of 01/01/2016 to Expulsion (L) effective 09/22/2016 Council: Initiate (D B C) as of 01/01/2016 to Expulsion (L) effective 09/22/2016 Consistory: Initiate (D B C) as of 01/01/2016 to Expulsion (L) effective 09/22/2016 Quick change request generated by Sentinel V2 user samartin.

The "Complete" entry shows that a request was submitted by the Valley to demit Herb C. Dunn, Jr. on 11/29/2014, and the request was completed.

The first "Pending Approval" entry shows that a request was submitted on 9/21/2016 to demit Tucker P. Bailey IV, and the request remains pending.

The second "Pending Approval" entry shows that a request was submitted on 9/22/2016 to expel Sam Adams, and the request remains pending.

SOJOURNER SEARCH

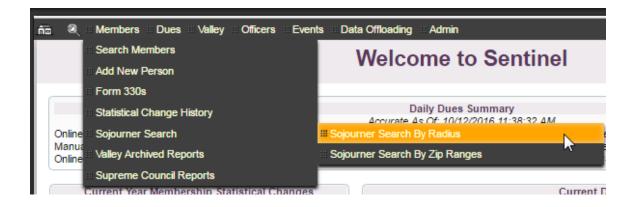
Sojourners are Scottish Rite, Southern Jurisdiction, members who reside in an Orient but are not members of any Valley in that Orient. SentinelV2 provides two ways to search an Orient for Sojourners: **Sojourner Search by Radius** and **Sojourner Search by Zip Ranges**.

SOJOURNER SEARCH BY RADIUS

The **Sojourner Search by Radius** allows you to identify Sojourners who live a certain number of miles from a particular zipcode.. For instance, you can find all of Sojourners who live within five miles of the zipcode 20895. In essence, the radius search creates a circle around a zip area and returns all of the Sojourners living in that circle.

Follow these steps to perform a **Sojourner Search by Radius**:

1. Expand the **Members** menu and click the **Sojourner Search by Radius** option on the submenu



2. Enter a Base Zip Code and a Mileage Range from Base. For this example, we will use 20895. Click the Search button.

Sojourner Radius Search
To create a Sojourner search, please provide a radius and base zip code below.
Base Zip Code: 20895 Mileage Range From Base: 5 Search

SentinelV2 will display a list of results on the screen. Regretfully, we cannot display the results of a Sojourner Search in this training guide because we cannot publish actual member addresses and contact information, but please give it a try to see how it works.

If there are no Sojourners in your search area, Sentinel will display the following message:



If you want to search for all Sojourners in an entire Orient, enter a **Zipcode Base Value** and enter 999 as the **Mileage Range from Base** as shown in the following graphic:

Sojourner Radius Search		
1	To create a Sojourner search, please provide a radius and base zip code below.	
	Base Zip Code: 20895 Mileage Range From Base: 999 Search	

SOJOURNER SEARCH BY ZIP RANGES

The **Sojourner Search by Zip Ranges** allows you to identify Sojourners who live within a single zipcode area or in a range of zip code areas. For instance, you can find all of Sojourners who have a zipcode of 20895, or 20895-20899. You can mix the search critera to include mutiple zipcodes and zipcode ranges as in "20895,20897, 20985-20999."

Follow these steps to perform a **Sojourner Search by Radius**:

1. Expand the **Members** menu and click the **Sojourner Search by Zip Ranges** option on the submenu.



2. Enter one number to search or a series of numbers. Click the Search button to display the results.

To create a zip list Sojourner search, enter zip code ranges (or individu in the box below seperated by a comma:	ual zip codes)
Zip Code List: Example: 12345-12348, 12350, 12999-13001, etc.	
20895,20897,20910-20913,20915	
Search	

Regretfully, we cannot display the results of a Sojourner Search in this training guide because we cannot publish actual member addresses and contact information, but please give it a try to see how it works.

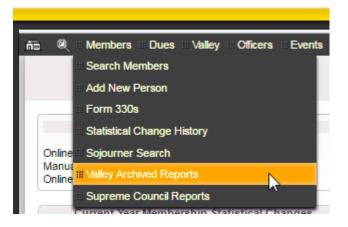
If there are no Sojourners in your search area, Sentinel will display the following message:



VALLEY ARCHIVED REPORTS

Valley Archived Reports is a storage area for all of the reports that you create in Sentinel and want to save. In addition, your Form 330s for Initiates and Fees are stored in in this area as well. For those of you familiar with Sentinel, version 1, **Valley Archived Reports** takes the place of **Form 330 Reprints**.

To view your saved reports, click Valley Archived Reports on the Members Menu.



Your archived reports screen should look similar to the table below. Click the **Report Name** on your screen to view the report.

Notice that the user has performed two Access database offloads. To the right of the entry there is a trash can that the user can click to delete the reports at will. Notice also that there is no trash can next to the Form 330 entries. There is no option to delete Form 330s. These reports will be retained by the system for archival purposes.

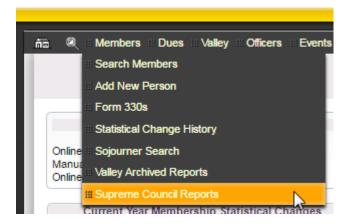
Form 330 Reports are stored indefinitely for archival purposes. The user cannot delete them.

🔍 🗉 Members 🗉 Dues	s Valley Officers	Events Data Offloading	Admin 🤑 🗉 Video Tuto	rials 💠 Logout
		Valley Ar	chived Reports	
			•	
Report Name	Created By	Created On	Description	
Form330_3921.pdf	Scott Martin	10/20/2016 2:41:37 PM	Form 330 (Additional Work) submitted on 10/20/2016 at 2:41 PM.	~
Form330_3920.pdf	Scott Martin	10/20/2016 2:36:45 PM	Form 330 submitted on 10/20/2016 at 2:36 PM.	
Sentinel344.mdb	Scott Martin	10/20/2016 2:35:57 PM	Access database offload created on 10/20/2016 at 2:35 PM.	1
Sentinel344.mdb	Scott Martin	10/20/2016 1:30:04 PM	Access database offload created on 10/20/2016 at 1:30 PM.	۲
Form330_3919.pdf	Scott Martin	10/20/2016 12:42:35 PM	Form 330 (Additional Work) submitted on 10/20/2016 at 12:42 PM.	

SUPREME COUNCIL REPORTS

The offices of the Supreme Council will deliver a variety of reports to your Valley directly through Sentinel. Examples of these reports include annual membership reports and monthly online electronic payment deposit reports.

To view your delivered reports, click Supreme Council Reports on the Members menu.



Your reports' screen should look similar to the following table. Click the report name in the **File** column on your screen to open the report.

ñī	a @ ≅ Members ≅ Dues :	Valley Officers Events Data Offloa	ding Admin 🤑 🗄	Video Tutoria	ls 💠 Logout
		Supreme Co	ouncil Published Reports		
	ReportType	File	Description	Created	Created By
	Online Dues Payment Report	MonthlyOnlineDues_February_2015.pdf	This is your February 2015 online dues payment report for your valley.	3/12/2015	Sandra Mukiri
	Annual Alpha Member Listing	Aberdeen_2014_AAML.pdf	This is your valley's 2014 year-end alpha membership listing report	2/16/2015	Tammy Fannin
	Annual Gains and Losses	Aberdeen_2014_AGAL.pdf	This is your valley's 2014 annual gains and losses report	2/16/2015	Tammy Fannin
	Annual Recapitulation	Aberdeen_2014_RECAP.pdf	This is your valley's 2014 membership recapitulation report	2/16/2015	Tammy Fannin
	Online Dues Payment Report	MonthlyOnlineDues_January_2015.pdf	This is your January 2015 online dues payment report for your valley.	2/10/2015	Sandra Mukiri
1					

CHAPTER 4: MEMBERSHIP STATUS CHANGES

We define a member's status as his current relationship with his Scottish Rite Valley—that is, his current status or relationship is either as an initiate, reinstatement, affiliation, demission, expulsion, or death. A member's current status displays on his **Profile Screen** under Member **Information**.

This chapter will show you how to perform the following functions:

- Submit a statistical change to update a member to reinstated, affiliated, demitted, or expelled
- Update a member's record to "Deceased"
- Report a member as affiliated or reinstated who does not have an existing SentinelV2 record

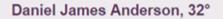
CHANGE A MEMBER'S STATUS (SUBMIT STATISTICAL CHANGE)

The following **Membership Information** shows that Daniel James Anderson's current status is "Initiate" in the Lodge, Chapter, Council, and Consistory. Let us assume that this member is demitting from your Valley to transfer to another Valley. In order to change his current status of "Initiate" to "Demit," you will use Sentinel to request a statistical change. This change request will be transmitted electronically to the Supreme Council Computer Services' staff that will review and activate the change as appropriate. Once activated, the member's record in SentineIV2 will show his current "Demit" status along with the effective date of the demit.

Daniel James Anderson	, 32 °	
	Daniel James Anderson, 32° Member ID: 11129873	Active
	Born on 2/19/1976 and is 40 years old S	Member Degrees 🖉
	Highest degree obtained is the 32° on 3/12/2011	Degree Date
	Valley Status; J	14th 2/12/2011
	Spouse Name: Jessie Walker	18th 2/12/2011
	Childrens Names: 2	30th 3/12/2011
	Preferred Mailing Address: Type: HOME Status: GOOD	32nd 3/12/2011 32nd KCCH 33rd GC
	11410 Frostburg Ln	Member Dues Information 🦉
	Beltsville, MD 20705	Dues Balance: \$320.00
	USA Last Validated On: Never	No payment ever received Dues Status: Normal
		Dues Type: Regular Dues
Upload	2nd Alternate Mailing Address: (WORK) 🎤	Generate a dues notic Year Dues Amount Paid Amount Outstanding
		2017 \$80.00 \$0.00 \$80.00
	3rd Alternate Mailing Address: () 🆉	2016 \$80.00 \$0.00 \$80.00 2014 \$80.00 \$0.00 \$80.00
		2014 \$60.00 \$0.00 \$60.00 Show Mor
	Telephone Numbers: 🖉	Membership Information
	Home Phone: 111-111-1111	Lodge Membership:
	Cell Phone: 111-111-1111 Work Phone: 111-111-1111	Test Valley Initiate (D B C) as of 2/12/2011
		Chapter Mem <mark>bership</mark> :
	Email Addresses: 🦉	Test Valley Initiate (D B C) as of 2/12/2011
	Preferred Email: scott@patriotsoftware.net Secondary Email:	Council Membership: Test Valley Initiate (D B C) as of 3/12/2011 Consistory Membership:
	Job/Work Information: 🎤	Test Valley Initiate (D B C) as of 3/12/2011
	Job Title:	Membership Change Histor

Follow these steps to change the member's current status from "Initiate" to "Demit."

1. On the member's **Profile Screen**, click the "gear" icon in the upper right corner.





2. On the menu that opens, click Request a statistical change for this member.



3. The statistical change screen will open and display the following which shows the member's current status and blank boxes for the proposed status.

Advanced Statistical (Change Request:			
Membership Level	Valley	Current Status	Proposed Status	Effective Date (mm/dd/yyyy)
Lodge:	Test ∀alley	Initiate (D B C)	· · · · · · · · · · · · · · · · · · ·	
Chapter:	Test Valley	Initiate (D B C)	•	
Council:	Test ∀alley	Initiate (D B C)	•	
Consistory:	Test ∀alley	Initiate (D B C)	•	
		Submit the a	above listed statistical change rec	quest

4. Click the downward pointing arrow under **Proposed Status** to display the status change options.

Membership Level	Valley	Current Status	Proposed Status	Effective Date (mm/dd/yyyy
Lodge:	Test ∀alley	Initiate (D B C)	N	
Chapter:	Test ∀alley	Initiate (D B C)	N	
Council:	Test ∀alley	Initiate (D B C)	Demission (F) Expulsion (L)	
Consistory:	Test ∀alley	Initiate (D B C)	Suspension NPD (J) Suspension Other (K)	

Submit only the levels of membership that are affected by a status change The system knows that you are changing the status of a member who is currently listed as "Initiate," so the menu only displays the options that can be applied to an initiate. Notice that there are no options to "Reinstate" or "Affiliate," as these actions would not be appropriate. Notice also that there is no option for "Death," because deceased changes are handled differently, and we will get to that a bit later. Notice also that there are letters next to each option in the menu. These are shorthand codes that are used for processing purposes only. You can disregard them.

- 5. Highlight your selection. In our example we are choosing, "Demission." The system will automatically fill in "Demission" for all four levels. If the member is not being demitted in all four levels, remove the "Demission" status for those levels by using the dropdown menu to edit the field/fields. Choose the blank status at the top of the menu list on the dropdown.
- 6. Type in the effective date in the format of MM/DD/YYYY as 10/20/2016. The system will automatically fill in the remaining date fields.

Your completed submission will resemble the following:

/lembership Level	Valley	Current Status	Proposed Status	Effective Date (mm/dd/yyyy)
.odge:	Test ∀alley	Initiate (D B C)	Demission (F)	10/20/2016
Chapter:	Test Valley	Initiate (D B C)	Demission (F)	10/20/2016
Council:	Test Valley	Initiate (D B C)	Demission (F)	10/20/2016
Consistory:	Test Vallev	Initiate (D B C)	Demission (F)	10/20/2016

- 7. To submit the status change, click Submit the above listed statistical change request.
- 8. The system will return a message stating that the change is "Pending."

TI	nis member has an ex	cisting pending change	e request that has yet to be	approved.
	Re	quest submitted by Tamera F	annin on 10/21/2016	
Membership Level	Valley	Current Status	Proposed Status	Effective Date
Lodge:	Test ∀alley	Initiate (D B C)	Demission (F)	10/20/2016
Chapter:	Test Valley	Initiate (D B C)	Demission (F)	10/20/2016
Council:	Test Valley	Initiate (D B C)	Demission (F)	10/20/2016
Consistory:	Test Valley	Initiate (D B C)	Demission (F)	10/20/2016

The member's **Profile Screen** will also display that a "Pending" change is present, and the notice will remain on his record until the change is reviewed and activated by the Supreme Council Computer Services' staff.

Daniel James Ander	son, 32°	*-
	Daniel James Anderson, 32° & Member ID: 11129873	Active
	Born on 2/19/1976 and is 40 years old 🎤	PENDING CHANGE PRESENT
	Highest degree obtained is the 32° on 3/12/2011 √alley Status: ℐ	Member Degrees 🖉

CHANGING A MEMBER'S STATUS TO DECEASED

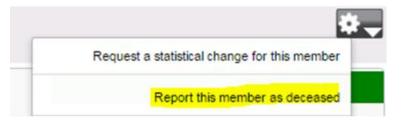
When a member dies, you will need to enter his date of death in his membership record. This is done on his **Profile Screen**. Once you enter the date of death and save it, the system applies the change to his record in real time—that is, you do not need to submit an electronic request to the Supreme Council to have his record updated.

Follow these steps to change a member's record to deceased:

1. On the member's Profile Screen, click the "gear" icon in the upper right corner to open the status change menu.

Joe A Randall, 32°			
	Joe A Randall, 32° / Member ID: 11138105	A	ctive
	Born on 1/1/1980 and is 36 years old I	Member Degrees 🦉	
	Highest degree obtained is the 32° on 2/25/2014	Degree	Date
	Valley Status: I	14th	1/25/2013
	Spouse Name: Donna &	18th	
	Childrens Names: 2	30th	
	Childrens Names. 2	32nd 32nd KCCH	2/25/2014
	Preferred Mailing Address:	33rd	
	Type: HOME	GC	
	Status: LOST	Member Dues Inform	No. 1
	100 Main st	riember Dues Inform	ation ¢

2. When the menu opens, click Report this member as deceased.



3. The update window will appear on your screen.

	Report this member a	s deceased	×
1	To report this member as deceased, you must of the member and, if available, the actual date		f the death
Date me	mber died:		
		Save	Cancel

You can also use the calendar to choose a date.

		Ĩ				
0	(Octo	ber 2	016		0
Su	Мо	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

4. Click the **Save** button. The record is updated to "Deceased," and the date of death is inserted on the Profile Screen.

Joe A Randall, 32° (DECEASED) Member ID: 11138105		Deceased
Born on 1/1/1980 and died on 10/21/2016	Member Degrees	1
Highest degree obtained is the 32° on 2/25/2014	Degree	Date
Valley Status: 🎤	14th	1/25/2013
Spouse Name: Donna 🥒	18th	
Childrens Names: 🖉	30th 32nd	2/25/2014

CHAPTER 5: THE DUES MENU

All Valleys are required to manage membership dues payments in SentinelV2. The information entered for members is made available to all of your members through the online Member Portal in real time. Thus, it is imperative that dues records are updated in a timely manner so that your members have access to the most up-to-date dues payment information online.

ADD DUES PAYMENTS

This section will show you how to add cash, check, and credit card payments for membership dues.

You will find the **Add Dues Payment** option on the **Dues** tab on the SentinelV2 black menu bar.

mia @ ∷ Members	Dues Valley Officers Events Data Offloading
	# Add Dues Payments
	Search Dues Payments
	III Search Donations
	Paid/Unpaid Roster
Online Payments R	Ⅲ Paid/Unpaid Roster (CSV Data OnlySuitable for Excel)

	i ∷ Valley ∷ Officers	s Events Data Offloading Admin Dues Batch A	\dd/Se	lect		E,	l ∷:VideoT	Futorial
		Add New Due	s Batch					
		Valley: Test Valley •						
		Batch Name: Dues payment bat	ch for 10/2	4/2016				
		Batch Type: Bank Deposit	•					
		Deposit Date: 10/24/2016						
		Add New Batch and Procee	d To Payme	ent Entry				
		Select an Existi	ng Batch					
		Server an Exist	ng Daten					
			and	Go	Clear			
Batch Date	Batch Type		-	Go Batch Total	Clear Actual Count	Actual Total	Difference	
	Batch Type Bank Deposit	Only show batches between	and Batch	Batch	Actual		Difference S.00	III.
10/28/2015		Only show batches between	and Batch Count	Batch Total	Actual Count	Total		
10/28/2015	Bank Deposit	Only show batches between Batch Name Sentinel V1 batch by samartin for 10/28/2015 Sentinel V1 batch by samartin for	and Batch Count 3	Batch Total \$70.00	Actual Count 3	Total \$70.00	\$.00	B
10/28/2015	Bank Deposit Bank Deposit Credit Card	Only show batches between Batch Name Sentinel V1 batch by samartin for 10/28/2015 Sentinel V1 batch by samartin for 10/21/2015 Sentinel V1 batch by Online Payment for	and Batch Count 3 1	Batch Total \$70.00 \$130.00	Actual Count 3	Total \$70.00 \$130.00	\$.00 \$.00	
10/28/2015 10/21/2015 10/23/2014	Bank Deposit Bank Deposit Credit Card Payments	Only show batches between Batch Name Sentinel V1 batch by samartin for 10/28/2015 Sentinel V1 batch by samartin for 10/21/2015 Sentinel V1 batch by Online Payment for 10/23/2014 Sentinel V1 batch by samartin for	and Batch Count 3 1	Batch Total \$70.00 \$130.00 \$10.00	Actual Count 3 1 1	Total \$70.00 \$130.00 \$10.00	\$.00 \$.00 \$.00	5 5
10/28/2015 10/21/2015 10/23/2014 5/15/2013	Bank Deposit Bank Deposit Credit Card Payments Bank Deposit	Only show batches between Batch Name Sentinel V1 batch by samartin for 10/28/2015 Sentinel V1 batch by samartin for 10/21/2015 Sentinel V1 batch by Online Payment for 10/23/2014 Sentinel V1 batch by samartin for 05/15/2013 Sentinel V1 batch by samartin for	and Batch Count 3 1 1 1	Batch Total \$70.00 \$130.00 \$10.00 \$10.00	Actual Count 3 1 1 1	Total \$70.00 \$130.00 \$10.00 \$10.00	\$.00 \$.00 \$.00 \$.00 \$.00	

Click on Add Dues Payments to open the Dues Batch Add/Select screen.

You can enter dues in two ways: Create a new dues batch or add payments to an existing batch. The sample page above displays a section to **Add New Dues Batch**.

	Add New Dues Batch
Valley:	Test Valley 🔻
Batch Name:	Dues payment batch for 10/24/2016
Batch Type:	Credit Card Payments 🔻
Deposit Date:	10/24/2016
Add New	Batch and Proceed To Payment Entry

...and a section to Select an Existing Batch.

		Select an Existin	g Batch						
		Only show batches between a	nd	Go	Clear				
Batch Date	Batch Type	Batch Name	Batch Count	Batch Total	Actual Count	Actual Total	Difference		
10/24/2016	Bank Deposit	Dues payments for 10/24/2016	0	\$0.00	0	\$0.00	\$.00	巴	۲
10/28/2015	Bank Deposit	Sentinel V1 batch by samartin for 10/28/2015	3	\$70.00	3	\$70.00	\$.00	B	

We will explain each of these processes in the next two sections.

ADD A NEW DUES BATCH

Follow these instructions to add a brand new dues batch:

1. Click the **Add Dues Payment** option on the **Dues** tab on the SentinelV2 black menu bar.



2. The **Valley** name will show your Valley name. The system will automatically enter the **Batch Name** and a **Deposit Date** as the current date.

Add New Dues Batch				
Valley:	Test Valley 🔻			
	Dues payment batch for 10/24/2016			
	Bank Deposit			
	10/24/2016			
Deposit Date.	10/24/2018			
Add New	Batch and Proceed To Payment Entry			

3. Use the Batch Type dropdown menu to choose the type of batch you are entering: **Bank Deposit** (cash and checks), **Credit Card**, or **Adjustment**. For this example we are choosing **Bank Deposit**

	Add New Dues Bate	tch	l .	
Valley:	Test Valley 🔻			
Batch Name:	Dues payment batch for	r 1	0/24/2016	
Batch Type:	Bank Deposit	•		
Deposit Date:	Credit Card Payments			15
	Bank Deposit			15
Add New	Adjustments		ment Entry	

- 4. Click **Add New Batch** and Procceed to Payment Entry.
- 5. The Valley Dues Payment screen will open. Type the member's identification number in the Member ID box and press the "Tab" key on your keyboard.

Test Val	ley Valley Dues Pa	yment Record 0 of 0
Save Save Save Save Save Save Save Save	e Payment Cancel Payment Add	Member Information
Member ID:	Lookup	Name:
Total Due:		Status Code:
Payment Type:	Check •	Line 1:
Check Number:		Line 2:
Dues Payment Amount:		City:
Thelma's Travel FundSend a senior to Greece and maybe Russia too!		Zip:
Martha's Early Retirement FundYou could save a life or at least a knee!		County:
Tammy's College FundPlease give generously!		Country:
Deposit Date:	10/24/2016	Home Phone:
Batch Summary: Batch Name: Dues payments for 10/24/2016 Actual Batch	Count: 0	Actual Batch Total: \$0.0000

If you do not have an ID number, you can use the **Lookup** feature. Click **Lookup**. Enter the member's name in the window that opens and click **Find**.

	Close
1	Use the first and last name fields below to find a member in your valley by name.
Last Name:	jonez
First Name:	john
Find	

When you click the **Find** button, SentinelV2 displays the member's name. Click the name to select it.

[Close
Use the	first and last nar	me fields below to find a member in your valley by name.
Last Name:	jonez	
First Name:	john	
Find		
Member Number	Name	Address
3142247	Jonez, John	123 Poplar Lane, Bethesda, MD 20798

6. After you have performed either Step 4 or Step 5 to display the member's payment, the payment window will open. Choose a **Payment Type** by clicking the dropdown menu arrow to display the choices. Make a selection by highlighting Check, Credit Card, or Cash. If the payment is by check, you can enter the number in the **Check Number** box.

Payment Information	1	
Member ID:		Lookup
Total Due:	* I	
Payment Type:	Check V	
Check Number: Dues Payment Amount:	Check Credit Card Cash	

- Next, the total balance due is displayed as the Dues Payment Amount. In this example, the balance is \$80. If needed, you can edit this amount by deleting the displayed amount and typing in a different amount. For example, the member may be making an underpayment or an overpayment.
- 8. Next, the payment screen displays the three charitable donations in the order that they were printed on your member dues notices. If the member is making a donation, enter the dollar amount of the donation in the appropriate box next to the name of the charity.
- 9. Update the member's address if necessary.
- 10. Click the **Save Payment** button. The payment is saved to the member's dues record.

The following image shows a payment of \$80 for 2017 plus a \$10 donation to the Scottish Rite Foundation

							-	
			Sav	e Payment	Cance	l Payment Add		
Payment Information						Member In	formation	
Member ID:	0111111	1	Lookup			Name:	John E Jones	
Total Due:	80.00	-				Status Code:	Good	•
	Check	-				Line 1:	123 Poplar Lane	
Payment Type:	Спеск					Line 2:		
Check Number:						City:	Bethesda	MD v
Dues Payment Amount:	80.00							MDV
Childrens at Scottish Rite						Zip:	20798	
Scottish Rite Foundation	10.00					County:		
Almoners Fund Donation						Country:	USA	•
Deposit Date:	11/4/201	16				Home Phone:		
Specify how this payn	nent shou	ld be appl	ied					
		-	Amount Due	Amount App	lied	Yearly Balance	Amount To Apply	
		2017	\$80.00	\$0.00		\$80.00	80.00	
			1	1				

11. SentinelV2 confirms that the payment was successful by displaying **"Saved"** in the upper left corner of the screen. The payment area is cleared so that you can enter your next payment.

Saved!	
	Save Payment Cancel Payment Add
Payment Information	Member Information
Member ID: Lookup	Name:
Total Due:	Status Code:
Payment Type: Check 🔻	Line 1:
Check Number:	Line 2:
Dues Payment Amount:	City:
Childrens at Scottish Rite	Zip:
Scottish Rite Foundation	County:
Almoners Fund Donation	Country:
Deposit Date: 11/4/2016	Home Phone:

ADD PAYMENTS TO AN EXISTING DUES BATCH

You can add dues payments to an existing batch at any time. For instance, if you create a batch in the morning and close the batch. You can reopen it later in the day and add additional payments.

Follow these instructions to open an existing batch of payments:

1. Click the **Add Dues Payment** option on the **Dues** tab on the SentinelV2 black menu bar.



2. Sentinel will display a list of all of the previously entered dues batches entered for your Valley.

	Select an Existing Batch									
		Only show batches between an	d	Go	Clear					
Batch Date	Batch Type	Batch Name	Batch Count	Batch Total	Actual Count	Actual Total	Difference			
10/28/2015	Bank Deposit	Sentinel V1 batch by samartin for 10/28/2015	3	\$70.00	3	\$70.00	\$.00	B		
10/21/2015	Bank Deposit	Sentinel V1 batch by samartin for 10/21/2015	1	\$130.00	1	\$130.00	\$.00	B		
10/23/2014	Credit Card Payments	Sentinel V1 batch by Online Payment for 10/23/2014	1	\$10.00	1	\$10.00	\$.00	B		

Over time your batch list will get very long. You can control the amount of batches displayed by entering a date range in the box labeled, "Only show batches between."

As an example, to show only batches entered from 10/21/2015 through 10/28/2015, you would enter the following date range and click the **Go** button.

Select an Existing Batch

Only show batches between 10/21/2015 and 10/28/2015 Go Clear

SentinelV2 displays the batches created between those two dates:

	Select an Existing Batch										
	Only show batches between 10/21/2015 and 10/28/2015 Go Clear										
Batch Date	Batch Type	Batch Name	Batch Count	Batch Total	Actual Count	Actual Total	Difference				
10/28/2015	Bank Deposit	Sentinel V1 batch by samartin for 10/28/2015	3	\$70.00	3	\$70.00	\$.00	B			
10/21/2015	Bank Deposit	Sentinel V1 batch by samartin for 10/21/2015	1	\$130.00	1	\$130.00	\$.00	5			

To enter additional payments in an existing batch, click the hand icon for the batch that you wish to open. For our example, let's use the "Bank Deposit" batch with "Batch Date" 10/21/2015.

Add Dues Payment to Batch

Number of payments: 1, Batch Date: 10/21/2015, Batch Total: \$130.00

Member ID	Name	Deposit Date	Dues Amount	Box 1 Amount	Box 2 Amount	Box 3 Amount	Total Payment Amount	Payment Origin	
11138105	Randall, Joe	10/21/2015	\$130.00	\$0.00	\$0.00	\$0.00	\$130.00	Manually entered	
1									

Notice in the above display that the **Add Dues Payment to Batch** table that the "Payment Origin" is "Manually entered." Remember! All Bank Deposit batches are either check or cash payments, which means that a SentinelV2 user "Manually entered" the payment into the system. You will always want to group all of your cash and/or check payments in a **Bank Deposit** batch and all credit card payments in a **Credit Cards Payments** batch.

3. Click the Add Dues Payment to Batch button.

Add Dues Payment to Batch

Number of payments: 1, Batch Date: 10/21/2015, Batch Total: \$130.00

Member ID	Name	Deposit Date	Dues Amount	Box 1 Amount	Box 2 Amount	Box 3 Amount	Total Payment Amount	Payment Origin	
11138105	Randall, Joe	10/21/2015	\$130.00	\$0.00	\$0.00	\$0.00	\$130.00	Manually	

4. The payment screen opens. Adding payments to an existing batch is the same as adding payments to a new batch, so follow steps 3 through 10 of the preceding section.

	Save Payment	Cancel Payment Add		
Payment Information			Member Information	
Member ID:		Lookup	Name:	
Total Due:			Status Code:	•
Payment Type:	Check	•	Line 1:	
Check Number:			Line 2:	
Dues Payment Amount:			City:	•
Thelma's Travel FundSend a senior to Greece and mayb	e Russia too!		Zip:	
Martha's Early Retirement FundYou could save a life or a	t least a kneel		County:	
Tammy's College FundPlease give generously!			Country:	•
Deposit Date:	10/21/2	015	Home Phone:	
Batch Summary:				
Batch Name:				
Sentinel V1 batch by samartin for 10/21/:	Actual Batch Count: 1		Actual Batch Total: \$ 130	0.0000

PROCESSING CREDIT CARD PAYMENTS

All Valleys can process credit card transactions using SentinelV2. The process is secure and uses authorize.net which is a certified credit card processing provider. No credit card information is stored in SentinelV2. Please note that authorize.net charges a credit card processing fee for each transaction: However, the Supreme Council pays 50 percent of the service fee.

SentinelV2 handles credit card dues payments the same way that the system handles check and cash payments. You can add a new credit card payment batch or add credit card payments to an existing batch. Therefore, if you are not familiar with the payment entry process, review the two preceding sections: Add a New Dues Batch and Add Payments to an Existing Dues Batch .

Follow these instructions to process credit card dues payments:

1. Click the **Add Dues Payment** option on the **Dues** tab on the SentinelV2 black menu bar.



2. The Dues Batch Add/Select screen opens.

If you are creating a new credit card payment batch, choose **Credit Card Payments** from the **Batch Type** dropdown menu.

If you want to Select and Existing Batch, click the hand	15	icon next to the Credit Card Payments
batch that you want to open.		

Dues Batch Add/Select	
Valley: Test Valley Batch Name: Dues payment batch for 11/11/2016 Batch Type: Credit Card Payments ▼ Deposit Date: 11/11/2016 Add New Batch and Proceed To Payment Entry	

	Select an Existing Batch									
		Only show batches between ar	nd	Go	Clear					
Batch Date	Batch Type	Batch Name	Batch Count	Batch Total	Actual Count	Actual Total	Difference			
10/28/2015	Bank Deposit	Sentinel V1 batch by samartin for 10/28/2015	3	\$70.00	3	\$70.00	\$.00	B		
10/21/2015	Bank Deposit	Sentinel V1 batch by samartin for 10/21/2015	1	\$130.00	1	\$130.00	\$.00	B		
10/23/2014	Credit Card Payments	Sentinel V1 batch by Online Payment for 10/23/2014	1	\$10.00	1	\$10.00	\$.00	8		

3. The payment screen opens. Enter the **Member ID** and click the **Tab** key on your keyboard to load the member's payment information or click the **Lookup** link to search for a member's record. Choose "Credit Card" from the **Payment Type** dropdown menu.

S	ave Payment Cancel Payment Add	
Payment Information	Member Information	
Member ID:	Lookup	Name:
Total Due:		Status Code:
Payment Type:	Check 🔻	Line 1:
Check Number:	Check Credit Card	Line 2:
Dues Payment Amount:	Cash	City:
Thelma's Travel FundSend a senior to Greece and maybe Russia	too!	Zip:
Martha's Early Retirement FundYou could save a life or at least a	knee!	County:
Tammy's College FundPlease give generously!		Country:
Deposit Date:	11/11/2016	Home Phone:
Batch Summary:		
Batch Name: Dues payments for 11/11/2016 Actual B	atch Count: 0	Actual Batch Total: \$0.0000

4. The screen will change to display the credit card information boxes. Enter the credit card information.

	Save Payment	Cancel Payment Add
Payment Information		
Member ID:		Lookup
Total Due:		
Payment Type:	Credit Ca	ard 🔻
Member's Credit Card Information		
Member CC#		
Exp Date: / (mm/yyyy)		
Card Code:		

- 5. Complete the process by checking the balance due for accuracy. If you are entering an overpayment or underpayment, edit the **Dues Payment Amount**. Enter any charitable donations that apply and make any address updates as needed.
- 6. Click the Save Payment button.
- 7. SentinelV2 confirms that the payment was successful by displaying **"Saved"** in the upper left corner of the screen. The payment area is cleared so that you can enter your next payment.

V		
Saved		
		Save Payment Cancel Payment Add
Payment Infor	mation	Member Information
Member ID:	Lookup	Name:
Total Due:		Status Code:

EDIT DUES PAYMENTS

You may find it necessary to change a member's total dues owed amount for a year or to correct and overpayment amount. The following sections will explain how to handle both of

CHANGING THE TOTAL DUES OWED

For this example we will use the record of a recently affiliated member. When a member first joins a Valley, his dues balance is set to zero. This applies to affiliated members, reinstated members (in some cases), and initiated members. A new member's record will look like the following:

	rent Dues Status Code: Normal 🔻		t Dues Status Code: Normal Current Dues Type Code:		Regular Dues	is Changes
	Yearly Dues M	aster	Dues Payments		Dues Change Log	
Yearl Year	y Dues Records Beginning Balance	Yearly Dues Owed	Payments Rec'd	Year Ending Balance	Last Modified	
2017	0.00	0.00	0.00	0.00	By: Rollover On: 6/30/2016	[Edit]

If the member has paid a certain amount or is going to be billed a certain amount, you will need to enter the **Beginning Balance** in his dues record. Follow these steps:

- 1. Display the member's **Profile** screen by performing a search for his record
- 2. Locate the **Member Dues Information** section on his Profile screen. Your display should look similar to the following. The years you will see displayed are dependent on the individual member's payment history. Our sample member has been reinstated in 2016, but notice that he has no dues payment information for 2016 and 2017 displayed in his dues record.

Member Dues Information 🖉						
		Gener	ate a dues notice			
Year	Dues Amount	Paid Amount	Outstanding			
2017	\$0.00	\$0.00	\$0.00			
2016	\$0.00	\$0.00	\$0.00			

- 3. To change the **Dues Amount**, click the "pencil" icon next to Member Dues Information or hover your mouse pointer over the dues area and click anywhere in the darker gray area. The dues edit screen will open.
- 4.

Current D	ues Stat	tus Code: Normal	•	Current Dues Type Code:	Regular Dues	Save Type and Stat	us Changes
	Yearly Dues Master		Dues Payments		Dues Change Log		
١		ues Records					
	Year	Beginning Balance	Yearly Dues Owed	Payments Rec'd	Year Ending Balance	Last Modified	
	2017	0.00	0.00	0.00	0.00	By: Rollover On: 6/30/2016	[Edit]
2	2016	0.00	0.00	0.00	0.00	By: Rollover On: 7/6/2015	[Edit]

5. To enter a balance due for 2016 click the **Edit** button. A box will appear around the Yearly Dues Owed. Click in the box to replace 0.00 with the correct amount. For this example we will use 80.00.

ent Dues St	atus Code: Normal	•	Current Dues Type	Code: Regular	Dues	 Save Type 	and Status Change
	Yearly Dues M	aster	Dues Payn	nents		Dues Change L	og
Yearly	Dues Records						
Year	Beginning Balance	Yearly Dues Owed	Payments Rec'd	Year Ending Bala	nce	Last Modified	
2017	0.00	0.00	0.00	0.00		By: Rollover On: 6/30/2016	[Edit]
2016	0.00	0.00	0.00	0.00		By: Rollover On: 7/6/2015	[OK] [Cancel]
						D IC I	

5. Here is the edited amount. Click the **OK** button to save your change.

rent Dues St	atus Code: Normal	T	Current Dues Type (Code: Regular	Dues	 Save Type 	and Status Change
Yearly Dues Master			Dues Payments			Dues Change Log	
Yearly	Dues Records						
Year	Beginning Balance	Yearly Dues Owed	Payments Rec'd	Year Ending Balar	ice	Last Modified	
2017	0.00	0.00	0.00	0.00		By: Rollover On: 6/30/2016	[Edit]
2016	0.00	80.00	0.00	0.00		By: Rollover On: 7/6/2015	[OK] [Cancel]
						Rv: ffannin	

To confirm the change on the member's **Profile** screen, click the arrow in the upper corner of the screen. This will take you to his back to his **Profile**.

G	Hei	nry Wa	alker Fre	eman, Sr.,	32°			
		0	The current due	es status and type impa	ct how the member will be t evious years. If you wish to o yearly dues details are	edit the existing dues year		
Current Du	ues Sta		Normal	T	Current Dues Type Coo			d Status Changes
-		Ye	arly Dues Maste	r	Dues Payments	S	Dues Change Log	
Y		ues Record						
	Year	Beginning B	alance	Yearly Dues Owed	Payments Rec'd	Year Ending Balance	Last Modified	
2	2017	80.00		0.00	0.00	80.00	By: Rollover On: 6/30/2016	[Edit]
2	2016	0.00		80.00	0.00	80.00	By: tfannin On: 12/2/2016	[Edit]
							Dur Hannin	

His Member Dues Information now shows him owing \$80.00 for 2016. Follow the same instructions to edit his 2017 dues.

Member Dues Information 🧷						
	Generate a dues noti					
Year	Dues Amount	Paid Amount	Outstanding			
2017	\$0.00	\$0.00	\$0.00			
2016	\$80.00	\$0.00	\$80.00			
2014	\$0.00	\$0.00	\$0.00			

ADJUST A MEMBER'S DUES RECORD TO CORRECT AN OVERPAYMENT

In SentinelV2, when you edit a previous payment amount, we call it an "Adjustment." SentinelV1 users should note that the correction of an overpayment in this version of Sentinel is different from the way you handled it in version 1. SentinelV1 allowed the user to edit the **Paid Amount** by simply overwriting the existing **Paid Amount**. To enforce stricter accounting and to create a "paper trail," SentinelV2 will not allow this type of overwriting.

In SentinelV2, to correct a **Paid Amount**, you will enter a new transaction. For our example, we will use a member who owed for 2016 and 2017 at a total amount of \$160. He paid \$80 for 2016, but his payment was incorrectly applied as \$160. Here is his current payment information that SentinelV2 displays prior to the adjustment.

Meml	Member Dues Information 🤌							
Dues Balance: \$0.00 Last payment rec'd on 12/2/2016 Dues Status: Normal Dues Type: Regular Dues								
			Genera	ate a dues notice				
Year	Dues Amount	Paid Am	ount	Outstanding				
2017	\$80.00	\$80.00		\$0.00				
2016	\$80.00	\$80.00 \$0.00						
2014	\$0.00	\$0.00		\$0.00				

Here are the instructions for creating an "Adjustment" transaction to change his amount paid from \$160.00 to \$80.00.

1. Select **Dues** on the SentinelV2 menu. Click **Add Dues Payments**.

	nte ::: Online Forme ::: F)ata Officiading III Admin	Video Tutorials	
				Logout
#Add Dues Payments				
III Search Dues Payments				
III Search Donations				
III Paid/Unpaid Roster				
Online Payments R	ly–Suitable for Excel)	rday:	0	
Manual Payments Entered Today:	0	Manual Payments Entered Yesterday:	0	

2. Under Add New Dues Batch, use the dropdown arrow to open the Batch Type menu. Click on Adjustments to select it.

Add New Dues Batch					
Valley:	Test Valley 🔻				
Batch Name:	Dues payment batch for 12/2/2016				
Batch Type:	Bank Deposit 🗾				
Deposit Date:	Credit Card Payments Bank Deposit				
Add New	Adjustments Batch and Proceed By Payment Entry				

- 3. Click Add New Batch and Proceed to Payment Entry.
- 4. On the **Valley Dues Adjustment** screen, enter his **Member ID** and press the **Tab** button on your keyboard. SentinelV2 will load his payment information and contact information.
- 5. For this example, we are adjusting a payment made originally by "Check.," Add the check number of the original payment (optional but recommended).

To reduce the incorrect payment amount from \$160.00 to \$80.00, type **-80.00** in the **Net Adjustment Amount**. This tells SentineIV2 to subtract \$80.00 from his payment amount. Be sure to include the minus sign. Press the **Tab** button on your keyboard to refresh the screen.

When you clicked the Tab button, SentinelV2 automatically placed -80.00 in the 2017 year at the bottom of the screen.

		_							
		Sav	ve Payment	Cancel Payment	Add				
Payment Information				Member Inf	orma	ation			
Member ID:	11149640	Lookup		Name:	San	n Adams			
Total Payment Amount:	-80.00			Status Code:	Go	od	•		
Payment Type:	Adjustment 🔻			Line 1:	830) Wright St			
Reference/Check Number:	1113			Line 2:					
Net Adjustment Amount:	-80.00			City:	Ind	ianapolis		IN	•
Deposit Date:	12/13/2016			Zip:	462	03-1749			
				County:					
				Country:	US	A			۲
				Home Phone:					
				Email Address:	sco	tt@patriotsoftware	e.net		
DUES PAYMENT DIST	RIBUTION: Specify	how this payı	ment should	be applied					
	Dues Year	Amount Due	Amount Appl	ied Yearly Balan	се	Amount To Apply			
	2017	\$0.00	\$80.00	\$0.00		<mark>-80.00</mark>			
	2016	\$0.00	\$80.00	\$0.00		0.00			

6. Click the **Save Payment** button to apply the -\$80.00 adjustment amount to 2017. Now, if you go back to the member's **Profile** screen and check his Dues Payment Information, you will see that the incorrect payment for \$80.00 has been removed from the 2017 row, and he now owes for that year.

The me balance	mber's grand total b	Dues Balance: \$ alance is the sum of	
Year	Dues Amount	Paid Amount	Yearly Net Balance
2017	\$80.00	\$0.00	\$80.00
2016	\$80.00	\$80.00	\$0.00
			Show More

LIFE MEMBERSHIP MANAGEMENT

We can define Life Membership in two ways: Members who pay a lump sum to purchase a Life Membership and members who are considered Life Members after achieving the 50-year mark. The following sections show you how to create records for paid Life Members and 50-year Life Members.

PAID LIFE MEMBERS

Valleys refer to paid Life Memberships in three ways: Life Member, Perpetual Member, or Endowed Member. SentinelV2 uses the "Endowed Member" term, and **the Current Dues Status Code** is set to **Endowed Life member (E)**, and the **Current Dues Type Code** is set to **No Dues Assessed**.

lember Current	Dues T	ype and Status Settings
	i	The current dues status and type impact how the member will be billed in <i>upcoming</i> dues years. These settings do not impact the dues year in progress or previous years. If you wish to edit the existing dues year or previous years, use the yearly dues details area below.
rrent Dues Status	Code:	Endowed life member (E) Current Dues Type Code: No Dues Assessed Save Type and Status Cha

To change a member's dues record from dues paying to Endowed Life Member, follow these steps:

- 1. Display the member's **Profile** screen by performing a search for his record.
- 2. Locate the **Member Dues Information** section on his Profile screen. Your display should look similar to the following. The years you will see displayed are dependent on the individual member's payment history.

Meml	Member Dues Information 🖉							
Dues Balance: \$0.00 Last payment rec'd on 10/18/2016 <mark>Dues Status: Normal Dues Type: Regular Dues</mark>								
		Gener	ate a dues notice					
Year	Dues Amount	Paid Amount	Outstanding					
2017	\$50.00	\$50.00	\$0.00					
2016	\$50.00	\$50.00	\$0.00					
2015	\$50.00	\$50.00	\$0.00					

3. To change the member's **Dues Status**, **Dues Type**, and **Dues Amount**, click the "pencil" icon next to **Member Dues Information** or hover your mouse pointer over the dues area and click anywhere in the darker gray area. The dues edit screen will open.

Dues Sta	atus Code:	Normal	•	Current Dues Type	Code:	Regular Dues	Save Type and	Status Chan
	Ye	early Dues Mas	ster	Dues Paym	ents		Dues Change Log	
Yearly I	Dues Record	is						
Year	Beginning B	alance	Yearly Dues Owed	Payments Rec'd	Year	Ending Balance	Last Modified	
2017	0.00		50.00	50.00	0.00		By: dmenning On: 11/13/2016	[Edit]
2016	0.00		50.00	50.00	0.00		By: dmenning On: 11/13/2016	[Edit]
2015	0.00		50.00	50.00	0.00		By: coverbey On: 5/3/2015	[Edit]

4. For this example, we are using a member who has paid his annual dues through 2017; however, he is now purchasing a Life Membership in the amount of \$1,000. Therefore, you will need to edit his Yearly Dues Owed to accept the \$1,000 payment.

To update his **Yearly Dues Owed**, click the **Edit** button on the 2017 payment row and enter \$1000.00 as his **Yearly Dues Owed**.

5. Click the **OK** button to save the change.

ent Dues St	atus Code: No	ormal	 Current Dues 1 	ype Code: Regular	T Dues Type	and Status Changes	
Yearly Dues Master Dues Payments Dues Change Log							
	Dues Records Beginning Balan	ce Yearly Dues Owed	Payments Rec'd	Year Ending Balance	Last Modified		
2017	0.00	1000.00	50.00	0.00	By: dmenning On: 11/13/2016	[OK] [Cancel]	
					Py: dmonning		

Notice that the member has already made a \$50.00 payment for 2017. If this \$50.00 is to be applied to the purchase of his Life Membership, then he has a remaining balance due of \$950.00. Use Go to Dues and Add Dues Payments to process his payment.

urrent Dues Sta	atus Code: Normal	T	Current Dues Type	Code: Regular	Dues 🔻	Save Type and St	atus Chang
	Yearly Dues M	aster	Dues Paym	ents	D	ues Change Log	
Yearly I	Dues Records						
Year	Beginning Balance	Yearly Dues Owed	Payments Rec'd	Year Ending Ba	lance La	st Modified	
2017	0.00	1,000.00	50.00	95 <mark>0.00</mark>		: tfannin n: 12/2/2016	[Edit]

6. After adding the \$950.00 payment, his **Member Dues Information** on his member **Profile** will look like the following:

Member Dues Information 🌶							
Dues Balance: \$0.00 Last payment rec'd on 12/2/2016 Dues Status: Normal Dues Type: Regular Dues							
	.,,,		ate a dues notice				
Year	Dues Amount	Paid Amount	Outstanding				
2017	\$1,000.00	\$1,000.00	\$0.00				
2016	\$50.00	\$50.00	\$0.00				
2015	\$50.00	\$50.00	\$0.00				

- 7. The \$950.00 payment has been applied to 2017 and added to the \$50.00 already paid. He has a zero balance due, but his **Dues Status** and **Dues Type** do not yet show him as an Endowed Life Member. To change this go back to his member Profile screen and click on his **Member Dues Information** to display the **Edit** screen.
- 8. Select Endowed Life Member (E) and No Dues Assessed. Click the Save Type and Status Changes button.

Current E)ues Sta	atus Code: Endov	ved life member (E)	•	Current Dues Type C	ode: No Due	s Assessed 🔻	Save Type and Statu	is Changes
	Yearly Dues Master			Dues Payments		Dues Change Log			
	Yearly I	Dues Records							
	Year	Beginning Balance	Yearly Dues Owed		Payments Rec'd	Year Ending Ba	lance	Last Modified	
	2017	0.00	1,000.00		1,000.00	0.00		By: tfannin On: 12/2/2016	[Edit]

Adding an Endowed Member (also called Life and Perpetual) seems like a lot of steps, but it is actually on three steps:

- 1. Edit the dues to show the new balance due
- 2. Apply the payment
- 3. Update the Current Dues Status Code and Current Dues Type Code

50-YEAR LIFE MEMBER MANAGEMENT

Some Valleys consider 50-Year members as Life Members, but other do not. If yours is a Valley that exempts 50-Year members from dues payment, follow these steps to identify your 50-Year members as Life Members.

To change a member's dues record from dues paying to Endowed Life Member, follow these steps:

1. Display the member's **Profile** screen by performing a search for his record.

2. Locate the **Member Dues Information** section on his Profile screen. Your display should look similar to the following. The years you will see displayed are dependent on the individual member's payment history.

Member Dues Information 🧷							
Dues Balance: \$120.00 Last payment rec'd on 10/8/2015 Dues Status: Normal Dues Type: Regular Dues							
	-	Genera	ate a dues notice				
Year	Dues Amount	Paid Amount	Outstanding				
2017	\$120.00	\$0.00	\$120.00				
2016 \$120.00 \$120.00 \$0.00							
2015	2015 \$75.00 \$75.00 \$0.00						

3. To change the member's **Dues Status**, **Dues Type**, and **Dues Amount**, click the "pencil" icon next to **Member Dues Information** or hover your mouse pointer over the dues area and click anywhere in the darker gray area. The dues edit screen will open.

)ues Sta	tus Code: Normal	T	Current Dues Type 0	ode: Regula	Save Type and Stat	us Changes
Yearly Dues Master			Dues Payments		Dues Change Log	
Year	Beginning Balance	Yearly Dues Owed	Payments Rec'd	Year Ending Ba	Last Modified	
2017	0.00	120.00	0.00	120.00	By: Rollover On: 6/30/2016	[Edit]
	Yearly I	Yearly Dues Ma: Yearly Dues Records Year Beginning Balance	Yearly Dues Master Yearly Dues Records Year Beginning Balance Yearly Dues Owed	Yearly Dues Master Dues Payment Yearly Dues Records Yearly Dues Owed Payments Rec'd	Yearly Dues Master Dues Payments Yearly Dues Records Yearly Dues Owed Payments Rec'd Year Ending Batance	Yearly Dues Master Dues Payments Dues Change Log Yearly Dues Records Yearly Beginning Balance Yearly Dues Owed Payments Rec'd Year Ending Balance Last Modified 2017 0.00 120.00 By: Rollover

- 4. Change the Current Dues Status Code to General Remit and 50-Year Life and change the Current Dues Type Code to No Dues Assessed.
- 5. Next, click the **Edit** button and change the **Yearly Dues Owed** amount to 0.00.

Your changes should look like the following.

Current	t Dues St	atus Code: General F	Remit and 50 Year (L)	Current Dues Ty	pe Code: No Due	s Assessed 🔻	Save Type a	and Status Chang	ges
	Yearly Dues Master			Dues Payments		Dues Change Log			
	Yearly	Dues Records							
	Year	Beginning Balance	Yearly Dues Owed	Payments Rec'd	Year Ending Balance	Last Modifie	ed		1
	2017	0.00	0.00	0.00	120.00	By: Rollove On: 6/30/20		[OK] [Cancel]	

6. Click the **Save Type and Status Changes** button to save your changes.

SEARCH DUES PAYMENTS

All payments entered can be searched and displayed on the screen and displayed as reports. The **Search Dues Payments** feature is located on the **Dues** menu.

ñD	.© ्∷ Members		
		Add Dues Payments	
		#Search Dues Payments	
		Search Donations	
		III Paid/Unpaid Roster	
	Online Payments I	Paid/Unpaid Roster (CSV Data Only–Suitable for Excel)	day:

 Click Search Dues Payments to open the search screen. You can search using any of the boxes available on the screen. For example, if you wanted to see all the payments made by one member, enter his Member ID and click Search Payments or you can enter his Last/First Name and click Search Payments.

	Search Payments
Member ID:	
Last/First Name:	
Check Number:	
Dues Payment Amount:	
Contribution for Child. Lang.:	
Contribution to Almoner's Fund:	
Contribution to Building Fund-:	
Deposit Date:	
Entered By:	
Entered On:	

2. You can search for a single **Dues Payment Amount** or a range by adding the dollar amount or range amount in the **Dues Payment Amount** box like this:

	Search Payments
Member ID:	
Last/First Name:	
Check Number:	
Dues Payment Amount:	10-20
Contribution for Child. Lang.:	

3. You can search for donations for the three funds displayed on a dues notice. This box is a date search. You can enter a single date or a date range (Date Range Example: 01/01/2016-12/31/2016.

Please Note! Additional donation searches will be covered in the next section, Search Donations.

	Search Payments
Member ID:	
Last/First Name:	
Check Number:	
Dues Payment Amount:	
Contribution for Child. Lang.:	11/12/2016

4. You can search by Deposit date for a single date or a date range (Date Range Example: 01/01/2016-12/31/2016).

	Search Payments
Member ID:	
Last/First Name:	
Check Number:	
Dues Payment Amount:	
Contribution for Child. Lang.:	
Contribution to Almoner's Fund:	
Contribution to Building Fund-:	
Deposit Date:	11/01/2016

5. You can search by Entered By, Entered On, and you can use multiple search boxes as in the following search that looks for all entries by user "tsmith" made on "11/01/2016."

Entered By:	tsmith
Entered On:	11/01/2016

SEARCH DONATIONS

All donations entered can be searched and displayed on the screen and displayed as reports. The **Search Donations** feature is located on the **Dues** menu.

ñÞ	۹	Members	III Dues	:::Valley	··· Officers	# Events	Online Forms	Data Offloading	III Admin
			III Add D	ues Payr	ients				
			Search	h Dues Pa	yments				
			#Search	n Donatio			2		
			⊞ Paid/U	Inpaid Ro	ster				
	Online	e Payments	∷ Paid/U	Inpaid Ro	ster (CSV [Data Only	Suitable for Exce	1)	

1. Click **Search Donations** to open the search screen.

	Search Donations
Member ID:	
Last/First Name:	
Check Number:	
Gift Fund:	?
Donation Amount:	
Deposit Date:	
Entered By:	
Entered On:	

- 2. You search by entering search criteria in the boxes. For example, search for all donations made by a single member by entering his **Member ID** and click **Search Donations** or you can enter his **Last/First Name** and **click Search Donations**.
- 3. You can search on multiple fields. For example, you can find all donations made by a member during a defined period by entering his **Member ID** or name combined with a date range in the **Deposit Date** field. Your search would look like the following:

	Search Donations	5
Member ID:	<mark>11113142</mark>	
Last/First Name:		
Check Number:		
Gift Fund:		?
Donation Amount:		
Deposit Date:	01/01/2014-12/31/2016	
Entered By:		
Entered On:		

4. You can search for all gift funds. First, click the question mark on the **Gift Fund** line to display all of the Valley's gift funds (charities).

Please Select Your Desired Fund(s), then Click 'Done' Use CTRL/SHIFT when clicking to select multiple items.					
Valley:					
Building Fund Hospital Fund S.R. Foundation Scholarship Fund	*				

5. Highlight the **Gift Fund** that you want to search on. Tip! You can search on multiple funds by holding down the Ctrl key on your keyboard while you select multiple Gift Funds.

Please Select Your Desired Fund(s), then Click 'Done' Use CTRL/SHIFT when clicking to select multiple items.								
Valley:	Albany	•						
	ig Fund al Fund							
S.R. Fo	S.R. Foundation							
Schola	rship Fund							

- 6. Click the **Done** button at the bottom of the screen. SentinelV2 will display your selection in the search form.
- 7. Click **Search Donations** to display all donations to the S. R. Foundation.

Search Donations									
Member ID:									
Last/First Name:									
Check Number:									
Gift Fund:	S.R. Foundation	?							
Donation Amount:									
Deposit Date:									
Entered By:									
Entered On:									

PAID/UNPAID ROSTER

The **Paid/Unpaid Roster** is a predefined report of the current dues status for every member in your Valley. This roster is a point-in-time report—That is, it displays the dues status of the members at the time you view the report.

You have two Paid/Unpaid Report Options: pdf document and Excel spreadsheet.

PAID/UNPAID ROSTER AS A PDF DOCUMENT

A pdf document is a static report that cannot be sorted. What you see is what you get.

1. To view the report, click the Paid/Unpaid Roster option on the Dues menu.

ña	.© ् ∷ Members	⊞Dues ⊞Valley ⊞Officers ⊞Events ⊞Online Forms ⊞Data Offloading ⊞Admin
		Search Dues Payments
		Search Donations
		#Paid/Unpaid Roster
	Online Payments I	Paid/Unpaid Roster (CSV Data Only-Suitable for Excel)

2. Leave the report output format set to Adobe Acrobat File.

Paid/Unpaid	Roster
Paid/Unpaid Ros	ter
	Select Parameters for this Report Output my report formatted as: Adobe Acrobat File
	< Back Run Report

3. Click **Run Report**. The report is displayed in up to three sections: Deceased Life Member Roster, Paid Roster and Unpaid Roster,

Here is a sample page from the Deceased Life Member Roster

												12/02/2010
Valley of Charlotte / Orient of North Carolina											1	Page 1 of 62
Deceased Life Member Roster (Perpetual)												
							,					
MEMBER	MEMBER S D CONTRIBUTIONS AMOUNT DUE HISTORY							PAYMENT HISTORY				
NAME	NUMBER	С	С	BOX 1	BOX 2	BOX 3	PAST DUE	CURRENT	TOTAL	Y - T - D	LAST	DATE
Arkwright, Peter	000154500	E		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Bates, William Floyd	007882418	E		0.00	0.00	0.00	0.00	0.00	0.00	0.00	650.00	05/09/2008
Bolick, Neal Clarence	000549865	E		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	09/08/2010
Bowers, William Crowell	000596999	E		0.00	0.00	0.00	0.00	0.00	0.00	0.00	65.00	10/06/2006
Brown, Earle Porter	000719476	E		0.00	0.00	0.00	0.00	0.00	0.00	0.00	325.00	10/02/2008
Cansler, John Henry, Jr	000915470	E		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

Here is a sample of a page from the Paid Roster. This roster includes paid Life Members (Dues code E) and 50-Year Life Members (Dues code L).

		Valley of Charlotte / Orient of North Carolina Paid Roster										Page 3 of 62
MEMBER	MEMBER	s	D	COI	NTRIBUTION	S	AMOUNT	DUE HISTORY		PAYMENT	HISTORY	
NAME	NUMBER	С	С	BOX 1	BOX 2	BOX 3	PAST DUE	CURRENT	TOTAL	Y - T - D	LAST	DATE
Abernathy, Donald Kendrick	008131831			0.00	0.00	0.00	0.00	0.00	0.00	110.00	110.00	09/14/2016
Abernathy, Jacob Ray, Jr	010364021			0.00	0.00	0.00	0.00	0.00	0.00	110.00	110.00	10/07/2016
Abernathy, James Edward	006986459			0.00	0.00	0.00	0.00	0.00	0.00	110.00	110.00	09/14/2016
Alterizio, Philip , Jr	000092619	L		0.00	0.00	0.00	0.00	0.00	0.00	0.00	20.00	10/25/2010
Altom, Kenneth K, Jr	000093914			0.00	0.00	0.00	0.00	0.00	0.00	110.00	110.00	10/14/2016
Archer, William Mack	011112525	E		0.00	0.00	0.00	0.00	0.00	0.00	0.00	650.00	12/03/2008

Here is a sample page from the Unpaid Roster.

					Valley of Ch	narlotte / Orien Unpaid Ros	t of North Carolina ster				Pa	12/02/2016 age 35 of 62
MEMBER	MEMBER	s	D	COI	NTRIBUTION	IS	AMOUNT	DUE HISTORY		PAYMENT	HISTORY	
NAME	NUMBER	С	С	BOX 1	BOX 2	BOX 3	PAST DUE	CURRENT	TOTAL	Y - T - D	LAST	DATE
Bingham, Johnny Allan	011151185			0.00	0.00	0.00	0.00	110.00	110.00	0.00	0.00	
Binnick, Warren Stewart	006986574			0.00	0.00	0.00	0.00	110.00	110.00	0.00	110.00	02/11/2016
Bisesti, Robert	011145443			0.00	0.00	0.00	0.00	110.00	110.00	0.00	110.00	12/01/2015
Black, David Jackson	007301310			0.00	0.00	0.00	110.00	110.00	220.00	0.00	110.00	12/19/2014

PAID/UNPAID ROSTER AS AN EXCEL SPREADSHEET

The Excel version of the Paid/Unpaid Roster is a display of the "raw" dues data that goes into the predefined pdf version of the Paid/Unpaid Roster. Unlike the pdf version, the Excel version will allow you to move columns and sort data. As with the pdf version, the Excel version is a point-in-time report. It displays the dues data for each member as it exists at the time you run the report.

1. To view the Paid/Unpaid Roster as an Excel spreadsheet, click Dues and choose Paid/Unpaid Roster (CSV Data Only-Suitable for Excel).

ñD	0	::: Members		:::Vallev	Officers	::: Events		III Data Offloading	Admin
				ues Paym					
				n Dues Pa					
			Search	n Donatio	ns				
			III Paid/U	Inpaid Ro	ster				
ſ			:#Paid/U	Inpaid Ro	ster (CSV D)ata Only	Suitable for Exce	I) 📐	

2. The Excel report displays. There are no sections to this report. You can manipulate the report as you see fit.

	Α	В	С	D	E	F	G	H	1	J	K	L	M	N	0	Р	Q	R	S	Т
1	PersonID	Prefix	FirstName	PrefFirstN	MiddleNa	LastName	LineageLa	FullName	Suffix	Statemen	DuesCode	LastPayDate	LastDuesE	Year2Amc	Year1Amc	CurrentAr	PaidYTD	LastPayAn	Box1Amo	Box2An
2	154500		Peter	Peter		Arkwright		Peter Arkv	vright	E				0	0	0	0	0	0	
3	7882418		William	William	Floyd	Bates		William F	Bates	E		5/9/2008 0:00		0	0	0	0	650	0	
4	549865		Neal	Neal	Clarence	Bolick		Neal C Bol	ick	E		9/8/2010 0:00		0	0	0	0	0	0	
5	596999		William	William	Crowell	Bowers		William C	Bowers	E		10/6/2006 0:00		0	0	0	0	65	0	
6	719476		Earle	Earle	Porter	Brown		Earle P Bro	own	E		10/2/2008 0:00		0	0	0	0	325	0	
7	915470		John	John	Henry	Cansler		John H Ca	Jr	E				0	0	0	0	0	0	
8	8076754		Robert	Robert	Nixon	Cuthrell		Robert N (Cuthrell	E		11/18/2013 0:00		0	0	0	0	0	0	
0	1401600		Samual	Com	Mortin	Davidson		Comunal MA	Davidson	c		12/0/2000 0.00		0	0	0	0	225	0	

CHAPTER 6: REPORTS AND DATA EXTRACTS

There are two basic ways to create reports in SentinelV2: Predefined Reports and Extracts. A predefined (also called "canned" reports) is already built into the system so that all you have to do is click a link to run the report. Examples of predefined reports are Avery 5160 labels, Member Directory Listing, and Donation Report by Fund. In the **Reports and Data Extracts** figure below, the reports under from **Select Desired Report the List** are all predefined reports.

Data Extracts allow the user to build a custom report by choosing the information from a list that you want to include in the report. Once you have created your data extract, you can save it for future use.

In the figure below, the data extract section is shown under **Select Desired Extract from the List**. You will use **All fields pertaining to members** or the shorter list, **Member address details only** to build your data extract. Notice that these two **Extract Names** are owned by the System. This means that they exist for all users and cannot be deleted. The **Email Extract** was created by user tfannin. We know this because SentinelV2 identifies it as (User defined). Notice that it has the trash can icon to the right. This means that the owner can delete the extract at any time.

The following sections will explain **Predefined Reports and Data Extracts** in more detail.

	Repo	rts a	nd I	Data Extracts
The set of records you				e reported or extracted using the options below. hat best fits your needs.
Select Desired Extract From The List				Select Desired Report From The List
Extract Name	Owner	Edit		Listing Reports (10 reports)
All fields pertaining to members	System			Member Dues Information
Email Extract (User defined)	tfannin	8		Member Directory Listing
Member address details only	System			Degree Date Listing
				Member Dues Notices
				Blue Lodge Information Listing
				4 × 6 Postcards
			- or -	Donation Report by Fund
				Donation Report by Member
				Registration Check-In Sheet
				Registration Report
				Labels Reports (1 report)
				People Label (Avery 5160 Laser Label)
				Envelope Reports (2 reports)
				Envelopes - Landscape Format
				#10 Envelopes

PREDEFINED REPORTS

Predefined Reports are located in several areas in SentinelV2. You will find them on the Welcome to Sentinel Screen (see also Chapter 1), the Members tab under Search Members (see also Chapter 3), and as reporting options for any search that you perform in SentinelV2 (see also Chapter 3).

PREDEFINED REPORTS ON THE WELCOME TO SENTINEL SCREEN

Chapter 1 is dedicated to defining predefined reports on the **Welcome to Sentinel Screen**, so it is suggested that you go back and review that Chapter, but here is a reminder screenshot. All of the entries on the screen under **Daily Dues Summary, Current Year Membership Statistical Changes, and Current Dues Statistics** are live links to a report.

		Welcor	ne to Sentinel				
			y Dues Summary Of: 12/3/2016 11:27:58 AM				
Online Payments Received Today:		O ACCUTATE AS	Online Payments Received Ye	sterday:		0	
Manual Payments Entered Today:		0	Manual Payments Entered Yes			0	
Online Payments Received Month-to-Date:		ō	Online Payments Received Ye			0	
Current Year Membership Statistical Changes			Current D	ues Statistics			
Accurate As Of: 12/3/2016 5:00:00 AM			Accurate As Of:	2/3/2016 5:01:0	01 AM		
Lodge Chapter Council Consistory	/			Count	% of Total	Orient Wide Avg.	Jurisdiction Wide Avg
Initiations:	7	Active Memb	ers with Dues Paid in Full:	0	0%	6%	31.5%
Affiliations:	0	Active Memb	ers with Current Dues Balance:	8	57.1%	43.3%	30.8%
Reinstatements:	0	Active Memb	ers with Arrears Dues Balance:	4	28.6%	11.2%	10.7%
Deaths:	0	Active Memb	ers that are Dues Exempt (A,L,R):	1	7.1%	0.1%	8%
Demissions:	0	Active Paid L	ife Members (E):	1	7.1%	39.4%	19%
Suspensions (Non-payment):	0						
Suspensions (Other reasons):	0						
Current Lodge Membership	14						

Follow these steps to create your report:

1. For our example, we will search for a list of Initiations under Current Year Membership Statistical Changes.

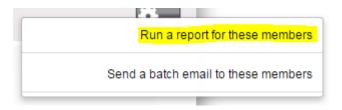
Click on **Initiations** to display the list of names.

Curre	ent Year Memb	ership Statisti	cal Changes	
4	Accurate As Of:	12/3/2016 5:00	0:00 AM	
Lodge	Chapter	Council	Consistory	
Initiations:				7
Affiliations:				0
Reinstateme	nts:			0
Deaths:				0
Demissions:				0
Suspensions	(Non-payment	t):		0
Suspensions	(Other reason	s):		0
Current Lodg	ge Membership			14

2. When the results list displays on your screen, click the gear in the upper right corner.

	Search Results - 7 records found	*-
Adams, Samuel Membership Number: 11149640 Status: Active 2301 Ward Road, Abilene, TX 78542 Phone : 111-111-111	Dues Balance: \$80.00 Dues Status: Normal Dues Type: Regular Dues	
Bailey, Tucker Princeton, 32 Membership Number: 11136085 Status: Active 777 Lucky Lane, Rockville, MD 20754 Phone : 333-444-5555 Email Address: scott@patriotsoftware.n	Dues Balance: \$130.00 Dues Status: Normal Dues Type: Regular Dues	

3. Click **Run a report for these members.** Notice also that you can send a batch email to these members by clicking that link.



4. Select any of the predefined reports from the list by clicking on the report name.

Select Desired Report From The List

```
Listing Reports (10 reports)
     Member Dues Information
      Member Directory Listing
     Degree Date Listing
      Member Dues Notices
      Blue Lodge Information Listing
      4 x 6 Postcards
      Donation Report by Fund
      Donation Report by Member
      Registration Check-In Sheet
      Registration Report
Labels Reports (1 report)
     People Label (Avery 5160 Laser Label)
Envelope Reports (2 reports)
      Envelopes - Landscape Format
      #10 Envelopes
```

PREDEFINED REPORTS ON THE MEMBERS TAB.

Several **Predefined Reports** are located on the **Members** tab: Ad-Hoc Search Reports, 33rd Degree Members, 50 Year Members, Deceased Members, and KCCH Members. Let's take a look at each report.

ña (©्	vents ⊞Online Forms ⊞ Data Offloading
	Search Members	IIINew Ad-Hoc Search
	III Add New Person	III 33rd Degree Members
	⊞ Form 330s	⊞50 Year Members
	Statistical Change History	III Deceased Members
	# Sojourner Search	III KCCH Members

MEMBER AD-HOC SEARCH REPORTS

Before you can create a **Member Ad-Hoc Search Report**, you must first create a **New Ad-Hoc Search**. Chapter 3 is dedicated entirely to Member Ad-hoc searches. The Chapter also includes instructions for running your reports, so we will not repeat the process here. Therefore, please see Chapter 3 for member searches and member reports.

The important point to remember is that reports are created using the gear icon in the upper corner of search results screen. The following is a list of predefined reports available for Member Ad-Hoc Search Results. We will not define each of these reports, as most of them are self-explanatory.

Select Desired Report From The List

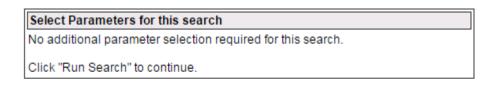
Listing Reports (10 reports)
Member Dues Information
Member Directory Listing
Degree Date Listing
Member Dues Notices
Blue Lodge Information Listing
4 x 6 Postcards
Donation Report by Fund
Donation Report by Member
Registration Check-In Sheet
Registration Report
Labels Reports (1 report)
People Label (Avery 5160 Laser Label)
Envelope Reports (2 reports)
Envelopes - Landscape Format
#10 Envelopes

33RD DEGREE MEMBER REPORT

1. Click on 33rd Degree Members on the Members tab.



2. Click on **Run Search** to display the results.



Run Search

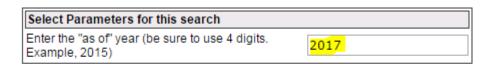
3. The results display. To create a report, click the gear in the upper right corner. No matter how you run a search, the steps for creating a report are virtually always the same—that is, you click the gear in the upper right corner. To complete your report, see steps 2 – 4 in the preceding section.

50-YEAR MEMBERS REPORT

The 50-Year Members Report is located on the Member tab.

ña	Q	Members Dues	•••Valley	III Officers	# Event	s III Online Forms	⊞ Data	Offloading
		Search Members				New Ad-Hoc Sear	ch	
		III Add New Person				33rd Degree Mem	ibers	
		III Form 330s				50 Year Members		
		Statistical Change H	listory		8	Deceased Membe	ers	~
		Sojourner Search			: _	KCCH Members		

- 1. Click on 50 Year Members.
- 2. Enter the "as of" year. For our example, we are using 2017 to find all active members who are potentially eligible for their 50-year award in 2017. We say "potentially" because Sentinel does not calculate breaks in membership.





3. Click Run Search to display the results.

Events III Online Forms III Data Officiading III Admin	
Search Results - 3 records for	ound 🔛
1, 32°	
Du	ues Balance: \$0.00 ues Status: Normal ues Type: Regular Dues
Sp	pouse Name:
Du	ues Balance: \$0.00 ues Status: Normal ues Type: Regular Dues
	Search Results - 3 records for 1, 32° 7300

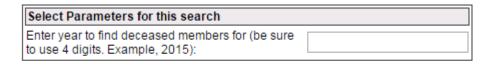
4. To create a report, click the gear in the upper right corner. No matter how you run a search, the steps for creating a report are virtually always the same—that is, you click the gear in the upper right corner. To complete your report, see steps 2 – 4.

DECEASED MEMBERS REPORT

The Deceased Members Report is located on the Members Tab.



1. Click **Deceased Members** to open the search screen.

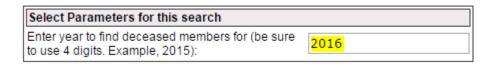


D	Consel	
кип	Search	1

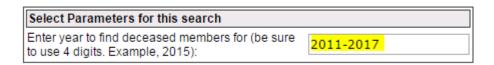
- 2. There are multiple search criteria that you can enter to create a report of deceased members.
 - To find a complete list of all deceased members, enter the date of the next year. For example, if the current year is 2016, enter **<2017** (all dates less than 2017) in the search box.

Select Parameters for this search	
Enter year to find deceased members for (be sure to use 4 digits. Example, 2015):	<2017

• To find a list for only one year, enter only that year in the search box.



• To find a list for multiple years, enter the range of years as in 2011-2016.



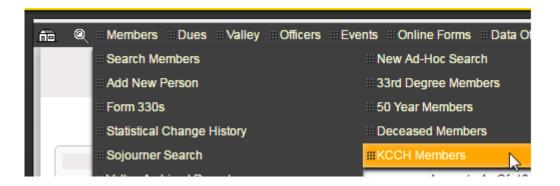
3. Click **Run Search** to display the results of the search.

Run Search

5. To create a report, click the gear in the upper right corner. No matter how you run a search, the steps for creating a report are virtually always the same—that is, you click the gear in the upper right corner.

KCCH MEMBERS SEARCH

The KCCH Members Search is located on the Members tab.



- 1. Click on KCCH Members to run the report.
- 2. Click on **Run Search** to display the results.



3. The results display. To create a report, click the gear in the upper right corner. No matter how you run a search, the steps for creating a report are virtually always the same—that is, you click the gear in the upper right corner.

DATA EXTRACTS

To review, **Data Extracts** allow the user to build a custom report by choosing the information from a list that you want to include in the report. Once you have created your data extract, you can save it for future use.

Data Extract Reports are located in several areas in SentinelV2. You will find them on the Welcome to Sentinel Screen (see also Chapter 1), the Members tab under Search Members (see also Chapter 3), and as reporting options for any search that you perform in SentinelV2 (see also Chapter 3).

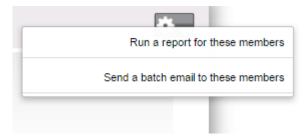
Once you have completed your search, and the search results are displayed on the screen, you can create several different types of reports.

Follow these instructions to perform a **Data Extract**:

- 1. Create a search so that your results are displayed on the screen. For instructions on creating searches, see Chapter 1, Chapter 3, and Chapter 7:f Predefined Reports.
- 2. On the Search Results screen of any search, click the gear in the upper right corner of the Sentinel screen.



3. Click the option to Run a report for these members.



4. The **Reports and Data Extracts** screen will open.

The set of records you have currently selected may be reported or extracted using the options below. Select the extract or report that best fits your needs. Select Desired Extract From The List Select Desired Report From The List Extract From The List Select Desired Report From The List Member address details only System Member address details only System Member Dues Information Member Dues Notices Blue Lodge Information Listing 4 x 6 Postcards - or - Donation Report by Fund Donation Report by Fund Donation Report by Member Registration Check-In Sheet Registration Report @ Labels Reports (1 report) People Label (Avery 5160 Laser Label) People Label (Avery 5160 Laser Label) @ Envelopes - Landscape Format #10 Envelopes Format	Members Dues Valley Officers Events Reports and Data Extracts			
Extract Name Owner Edit Af fields pertaining to members System Member address details only System System Member Dues Information Member Directory Listing Degree Date Listing Member Dues Notices Blue Lodge Information Listing 4 x 6 Postcards -or - Opnation Report by Fund Donation Report by Fund Donation Report by Member Registration Check-In Sheet Registration Report Elabels Reports (1 report) People Label (Avery 5160 Laser Label) Envelopes - Landscape Format	The set of rec			
All fields pertaining to members Member address details only System Member address details only System Member Dues Information Member Dues Information Member Dues Notices Blue Lodge Information Listing 4 x 6 Postcards - or - Donation Report by Fund Donation Report by Fund Donation Report by Member Registration Check-In Sheet Registration Report Elabels Reports (1 report) People Label (Avery 5160 Laser Label) Envelopes - Landscape Format	Select Desired Extract From The	e List		Select Desired Report From The List
All fields pertaining to members System Member Dues Information Member address details only System Member Directory Listing Degree Date Listing Member Dues Notices Blue Lodge Information Listing 4 x 6 Postcards - or - Donation Report by Fund Donation Report by Fund Donation Report by Member Registration Check-In Sheet Registration Check-In Sheet Registration Report E Labels Reports (1 report) People Label (Avery 5160 Laser Label) Envelope Reports (2 reports) Envelopes - Landscape Format	Extract Name	Owner Ed	lit	Listing Reports (10 reports)
Member Directory Listing Degree Date Listing Member Dues Notices Blue Lodge Information Listing 4 × 6 Postcards - or - Donation Report by Fund Donation Report by Member Registration Check-In Sheet Registration Check-In Sheet Registration Report Eabels Reports (1 report) People Label (Avery 5160 Laser Label) Envelopes - Landscape Format	All fields pertaining to members	System		
Degree Date Listing Member Dues Notices Blue Lodge Information Listing 4 x 6 Postcards - or - Donation Report by Fund Donation Report by Member Registration Check-In Sheet Registration Report Eabels Reports (1 report) People Label (Avery 5160 Laser Label) ■ Envelope Reports (2 reports) Envelopes - Landscape Format	Member address details only	System		Member Directory Listing
Blue Lodge Information Listing 4 x 6 Postcards - or - Donation Report by Fund Donation Report by Member Registration Check-In Sheet Registration Report Eabels Reports (1 report) People Label (Avery 5160 Laser Label) Envelopes - Landscape Format				Degree Date Listing
4 x 6 Postcards - or - Donation Report by Fund Donation Report by Member Registration Check-In Sheet Registration Report ≅ Labels Reports (1 report) People Label (Avery 5160 Laser Label) ≅ Envelope Reports (2 reports) Envelopes - Landscape Format				Member Dues Notices
- or - Donation Report by Fund Donation Report by Member Registration Check-In Sheet Registration Report E Labels Reports (1 report) People Label (Avery 5160 Laser Label) Envelope Reports (2 reports) Envelopes - Landscape Format				Blue Lodge Information Listing
Donation Report by Member Donation Report by Member Registration Check-In Sheet Registration Report Image: Sheet Sh				4 x 6 Postcards
Registration Check-In Sheet Registration Report I Labels Reports (1 report) People Label (Avery 5160 Laser Label) I Envelope Reports (2 reports) Envelopes - Landscape Format			- or	- Donation Report by Fund
Registration Report E Labels Reports (1 report) People Label (Avery 5160 Laser Label) Envelope Reports (2 reports) Envelopes - Landscape Format				Donation Report by Member
Labels Reports (1 report) People Label (Avery 5160 Laser Label) Envelope Reports (2 reports) Envelopes - Landscape Format				Registration Check-In Sheet
People Label (Avery 5160 Laser Label) Envelope Reports (2 reports) Envelopes - Landscape Format				Registration Report
Envelope Reports (2 reports) Envelopes - Landscape Format				Labels Reports (1 report)
Envelopes - Landscape Format				People Label (Avery 5160 Laser Label)
				Envelope Reports (2 reports)
#10 Envelopes				Envelopes - Landscape Format
				#10 Envelopes

The Data Extract menu is displayed in the left column. Under Select Desired Extract from the List. You have two options under Select Desired Extract from the List: All fields pertaining to members and Member address details only. Clicking on either of these options will open a screen to display a list of information which will allow you to build your own report by selecting the information topics that you want presented in your report. All fields pertaining to members is a long list which provides every field option in sentinel. Member address details only is a short list which contains name and address information.

Select Desired	Extract From	The List	
•••••			

Extract Name	Owner	Edit
All fields pertaining to members	System	~
Member address details only	System	

To view these lists, click each name to open it. It is up to you to decide which list you will use to build your report. For our example, we will use the shorter list, **Member address details only**. **All fields pertaining to members** works exactly the same way, so what you learn here will also apply to that list.

5. Click on Member address details only to open it.

Select Desired Extract From The List			
Extract Name	Owner	Edit	
All fields pertaining to members	System		
		5	
Member address details only	System		

6. The Data Extract lists opens. This is the list of fields that you can include in your report. Remember! We are using the short list, for more options, use All fields pertaining to members.

For this example we want to create an excel spreadsheet containing the PPersonID (member ID), first name, last name, suffix, address, and phone number. We want the list to be in alphabetical order by last name/first name.

	Select and order	fields for your	extract
	Reset Fields Delete Checked Delete	Unchecked Save Template	Next >>
	Check/Unc	heck All:	
Field Sequence	Data Extract Field	Field Delete	Field Order
0	PPersonID		+ +
1	Prefix		+ +
2	FirstName		+ +
3	MiddleName		+ +
4	LastName		+ +
5	Suffix		+ +
6	LastCommaFirstName		+ +
7	PrefAddrLine1		+ +
8	PrefAddrLine2		+ +
9	PrefAddrCity		+ +
10	PrefAddrState		+ +
11	PrefAddrZip		+ +
12	PrefAddrCountry		+ +
13	HomePhone		+ +
14	SentineIID		+ +
15	FullName		+ +

.

- 7. Select the Data Extract Fields to be included in the spreadsheet by clicking the check box in the Field Delete column.
- 8. Once finished, your list should look like the following display. Notice the checkmarks in the fields that will be included.

	Reset Fields Delete Checked Delete Ur	nchecked Save Template	Next >>			
	Check/Uncheck All:					
Field Sequence	Data Extract Field	Field Delete	Field Order			
0	PPersonID		+ +			
1	Prefix		+ +			
2	FirstName		+ +			
3	MiddleName		+ +			
4	LastName		+ +			
5	Suffix		+ +			
6	LastCommaFirstName	 Image: A start of the start of	+ +			
7	PrefAddrLine1	 Image: A start of the start of	+ +			
8	PrefAddrLine2	 Image: A start of the start of	+ +			
9	PrefAddrCity	 Image: A start of the start of	+ +			
10	PrefAddrState	 Image: A start of the start of	+ +			
11	PrefAddrZip	 Image: A start of the start of	+ +			
12	PrefAddrCountry		+ +			
13	HomePhone		+ +			
14	SentineIID		+ +			
15	FullName		+ +			

If you made a mistake and want to start over, click the **Reset Fields** button.

9. Now you want to remove the unwanted fields. **Click Delete Unchecked** at the top of the window. The unwanted fields are removed.

Select and or	der fields for	your extract
---------------	----------------	--------------

Reset Fields Delete Checked Delete Unchecked Save Template Next >> Check/Uncheck All:			
Field Sequence	Data Extract Field	Field Delete	Field Order
0	PPersonID		<mark>+ +</mark>
1	LastCommaFirstName		<mark>↓</mark> ↑
2	PrefAddrLine1		+ +
3	PrefAddrLine2		+ +
4	PrefAddrCity		+ +
5	PrefAddrState		+ +
6	PrefAddrZip		+ +
7	HomePhone		+ +

Notice the up-and-down arrows in the Field Order Column. Use these arrows to determine how you want your columns to display in your spreadsheet. For example, if you want the phone number to follow the member's name, click the upward arrow on the phone number row. The **Home Phone** will move up the list. Keep clicking the arrow next to it until it is placed where you want it.

Here is the result of moving **Home Phone** under **LastCommaFirstName**:

Field Sequence	Data Extract Field	Field Delete	Field Order
0	PPersonID		+ +
1	LastCommaFirstName		+ +
2	HomePhone		+ +
3	PrefAddrLine1		+ +
4	PrefAddrLine2		+ +
5	PrefAddrCity		+ +
6	PrefAddrState		+ +
7	PrefAddrZip		+ +

- If this is a data extract that you plan to use over and over, you can save it for future use by clicking Save Template. For now, we will click Next to proceed and come back to saving templates a little later.
- **11.** SentinelV2 will ask how you want to output your report.

Complete Extract Options		
File Name:	tfannin	
File Format:	Tab-Delimited Text (Suitable for MS Word)	
	<< Previous Run >>	

12. Click the downward arrow to open the **File Format** menu. You have four output options to choose from, but for our example, we will choose HTML Table (Suitable for MS Excel).

Complete Extr	act Options	
File Name:	tfannin	
File Format:	Tab-Delimited Text (Suitable for MS Word) 🔻	
	Tab-Delimited Text (Suitable for MS Word)	
	HTML Table (Suitable for MS Excel)	
	Comma-Delimited Text	
	 Pipe-Delimited Text 	

13. Click the **Run** button to create the spreadsheet.

Complete Extra	act Options
File Name:	tfannin
File Format:	Tab-Delimited Text (Suitable for MS Word) ▼
	<< Previous Run >>

14. You now have two options. If for some reason you do not want to open the report, click the **Continue** button to return to the result list to start over; otherwise, click the **Click here to download** link.

Your file will download according to the method used by your browser. For example, if you are using Google Chorme, the downloaded file will appear in the lower left corner of your screen. You can now open and save the file.

Data Extract Progress
100% Done
Continue
Your data extract is finished. Click here to download.

SAVING A DATA EXTRACT TEMPLATE FOR FUTURE USE

The previous section showed you how to create a Data Extract. If you are unfamiliar with this process, please review the **Data Extract**.

Once you have completed steps 1 - 10 of the previous section and have selected the fields that you want to include in your data extract, you can follow these instructions to save that extract so that you do not have to build it again. SentinelV2 will store the extract fields for you so that you can use them whenever needed. It is important to point out that SentinelV2 does not store the results (names) included in the extract; it stores the field names that you want to include in the extract.

Here are the field names that we want to store for future use.

Reset Fields Delete Checked Delete Unchecked Save Template Next >> Check/Uncheck All:						
Field Sequence	Data Extract Field	Field Delete	Field Order			
0	PPersonID		+ +			
1	LastCommaFirstName		+ +			
2	HomePhone		+ +			
3	PrefAddrLine1		+ +			
4	PrefAddrLine2		+ +			
5	PrefAddrCity		+ +			
6	PrefAddrState		+ +			
7	PrefAddrZip		+ +			

To save this data extract list, follow these instructions:

- 1. Click the **Save Template** button.
- 2. Give the data extract a name. For this example, we will use "Member Address & Phone."
- 3. Click the **Save Template** button.

	Reset Fields Delete Checked Delete Und Check/Und	checked Cancel Template Sau check All:	ving Next >>
By saving this	field list as a template, you will be able to use this	s new extract template s field list you have customized ag h time.	gain without having to select them
Name:	Member Address & Phone	Save this Temp	late
Field Sequence	Data Extract Field	Field Delete	Field Order
0	PPersonID		+ +
1	LastCommaFirstName		+ +
2	HomePhone		+ +
3	PrefAddrLine1		+ +
4	PrefAddrLine2		+ +
5	PrefAddrCity		+ +
6	PrefAddrState		+ +
7	PrefAddrZip		+ +

4. The next time you create a search and then click the gear to run a report, your saved extract will appear as an option under **Extract Name**. Notice that it is not owned by the "system." It is owned

by user tfannin. The extracts that you create and save will show your username under **Owner**. When you no longer want the extract to appear in the list, click the **trash can** to delete it.

Select Desired Extract From The List		
Extract Name	Owner	Edit
All fields pertaining to members	System	
Member Address & Phone (User defined)	tfannin	0
Member address details only	System	