THE SUPREME COUNCIL 33°

ANCIENT AND ACCEPTED SCOTTISH RITE OF FREEMASONRY

SOUTHERN JURISDICTION, USA

SENTINEL

VERSION 2

TRAINING MANUAL

SENTINELV2 TRAINING MANUAL

Supreme Council, 33°

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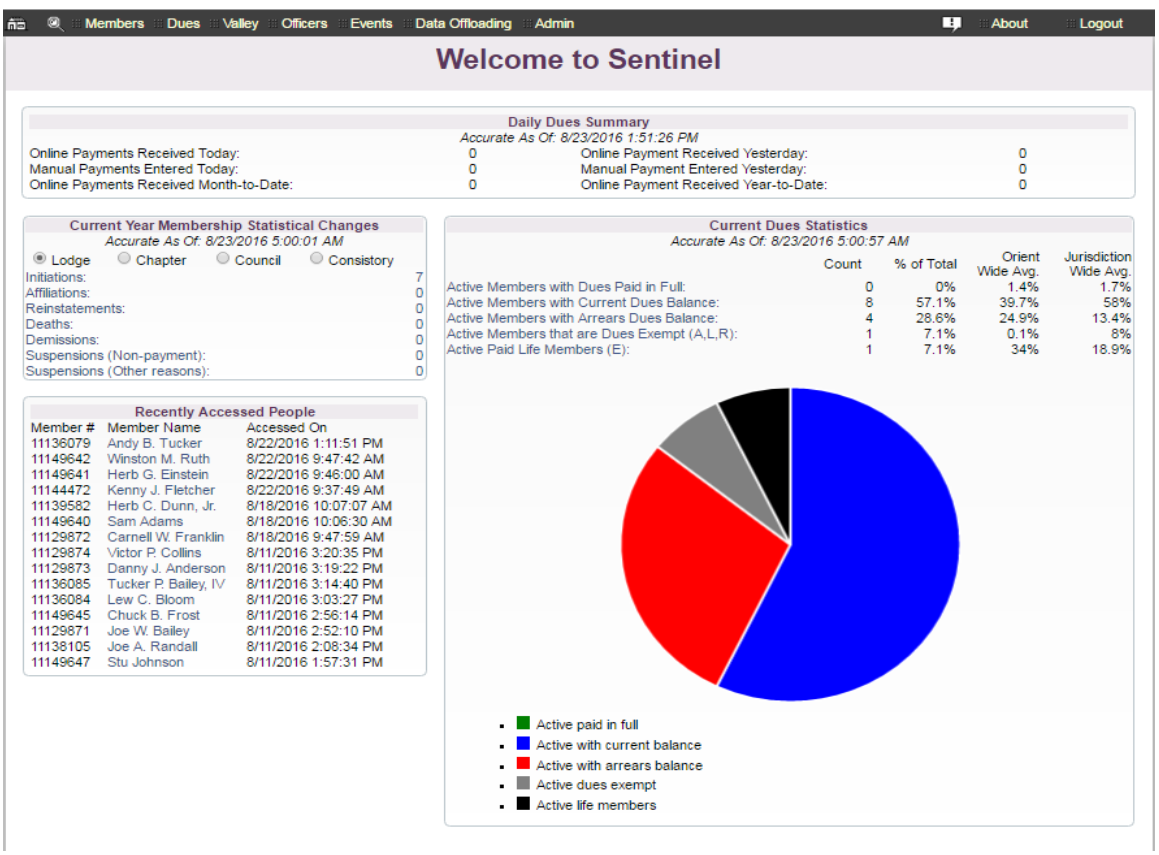
CHAPTER 1: WELCOME TO SENTINEL SCREEN

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 www.ScottishRite.org 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 As Of: 8/23/2016 1:56:14 PM

Online Payments Received Today:	0	Online Payment Received Yesterday:	0
Manual Payments Entered Today:	0	Manual Payment Entered Yesterday:	0
Online Payments Received Month-to-Date:	4	Online Payment Received Year-to-Date:	66

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:	4
Reinstatements:	8
Deaths:	29
Demissions:	6
Suspensions (Non-payment):	0
Suspensions (Other reasons):	0

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 Accessed 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

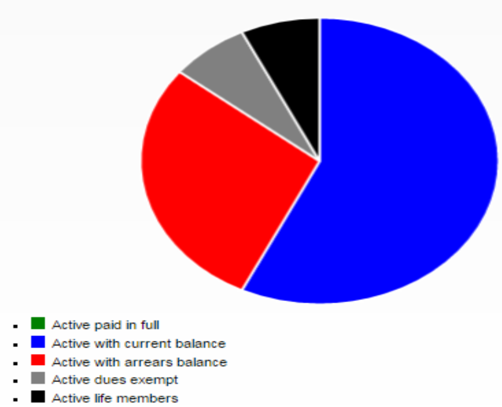
CURRENT DUES STATISTICS

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.

Current Dues Statistics

Accurate As Of: 8/23/2016 5:00:57 AM

	Count	% of Total	Orient Wide Avg.	Jurisdiction Wide Avg.
Active Members with Dues Paid in Full:	0	0%	1.4%	1.7%
Active Members with Current Dues Balance:	8	57.1%	39.7%	58%
Active Members with Arrears Dues Balance:	4	28.6%	24.9%	13.4%
Active Members that are Dues Exempt (A,L,R):	1	7.1%	0.1%	8%
Active Paid Life Members (E):	1	7.1%	34%	18.9%

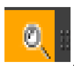


CHAPTER 2: THE SENTINELV2 MENU BAR

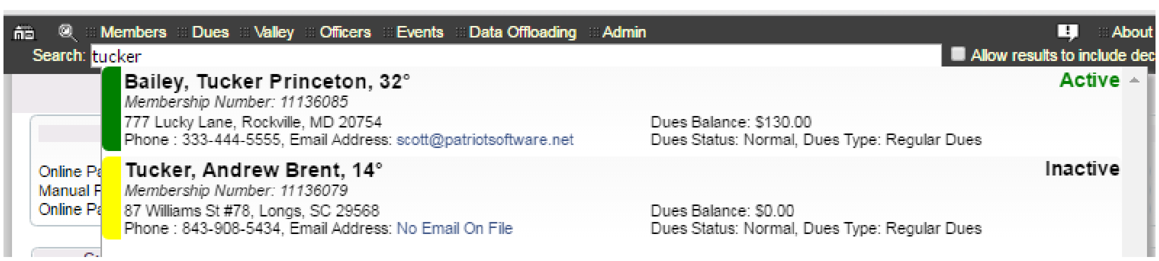
The SentinelV2 **Menu Bar** displays at the top of the SentinelV2 window. The menu options vary depending on the type of user account that you have. Sentinel Valley Administrators will see the “Admin” tab while all other permission level users will not.

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)

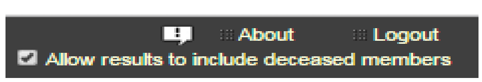
The Hourglass icon , commonly referred to as the “Lollipop,” is your member quick search function. This search will return results quickly, but it is not intended as a means to create reports. For reports you will need to use **Search Members** which is located under the **Members** tab.

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.



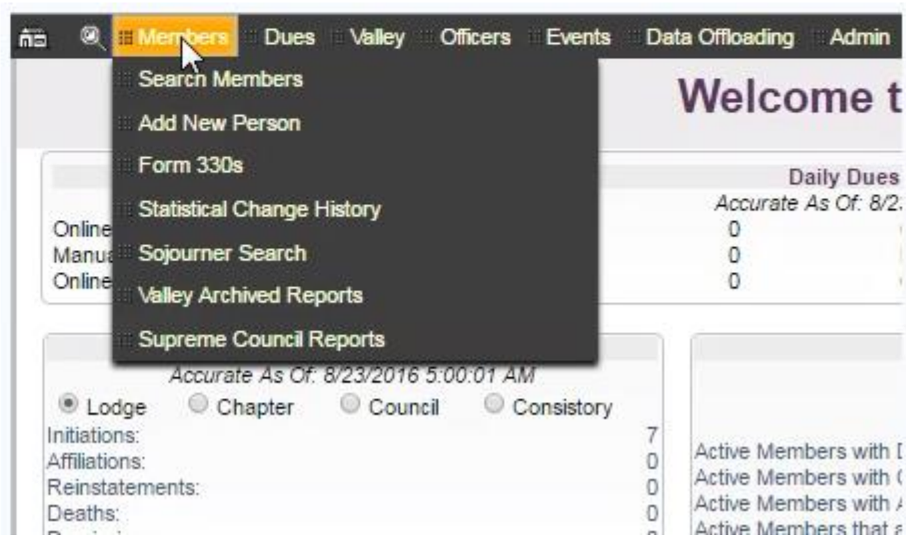
The Lollipop search responds to keystrokes. It will not function correctly when a number or name is pasted into it

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.



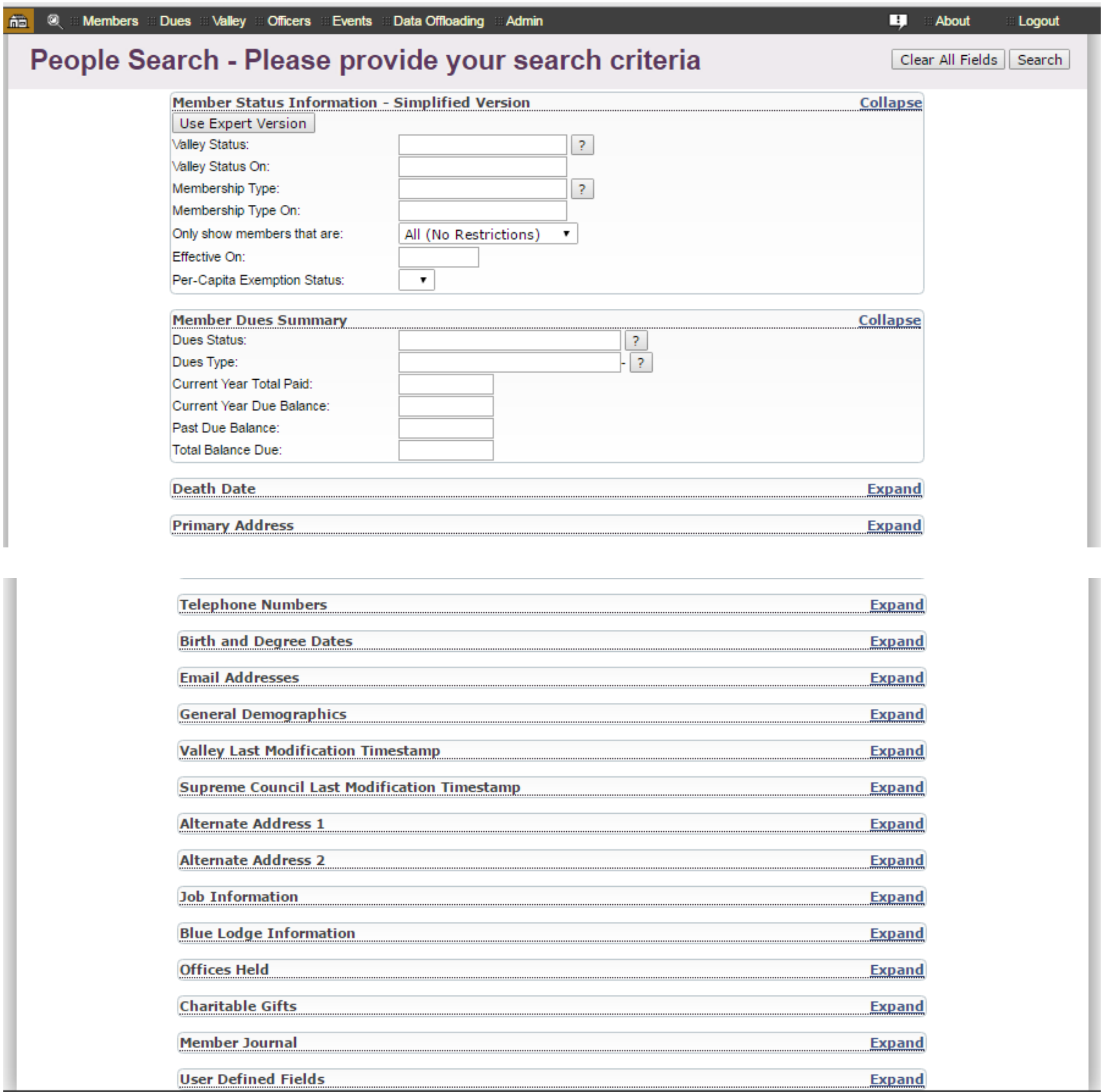
The following sections will explain the **Members** tab menu options in detail.

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.

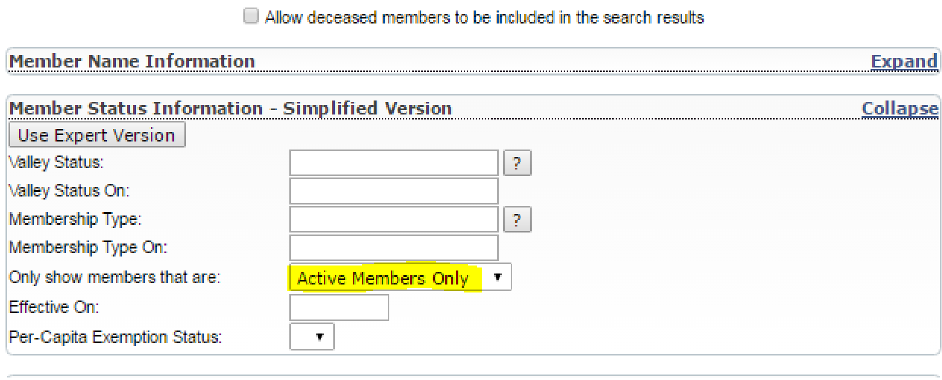


This is your all-purpose **Simple Search** screen. Notice that you can expand and collapse the various search categories. The top two are the most used, so they are designed to remain open by default, but you can manually collapse them.

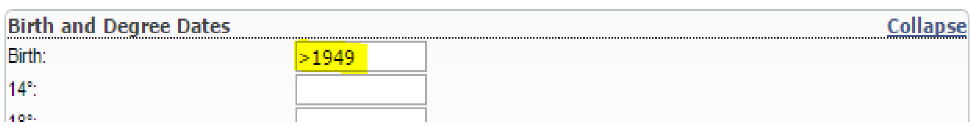
Take a look around the search screen. Expand and collapse the different categories to get a feel for the way it works and to familiarize yourself with the many search options. Every field on the s screen is searchable, and you can combine searches among as many categories as you need.

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:

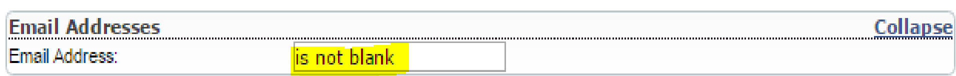
1. Under **Member Status Information - Simplified Version,** set **"**only show members that are" to "Active Members Only." You can collapse the top category, **Member Name Information**, because it is not needed for this search.



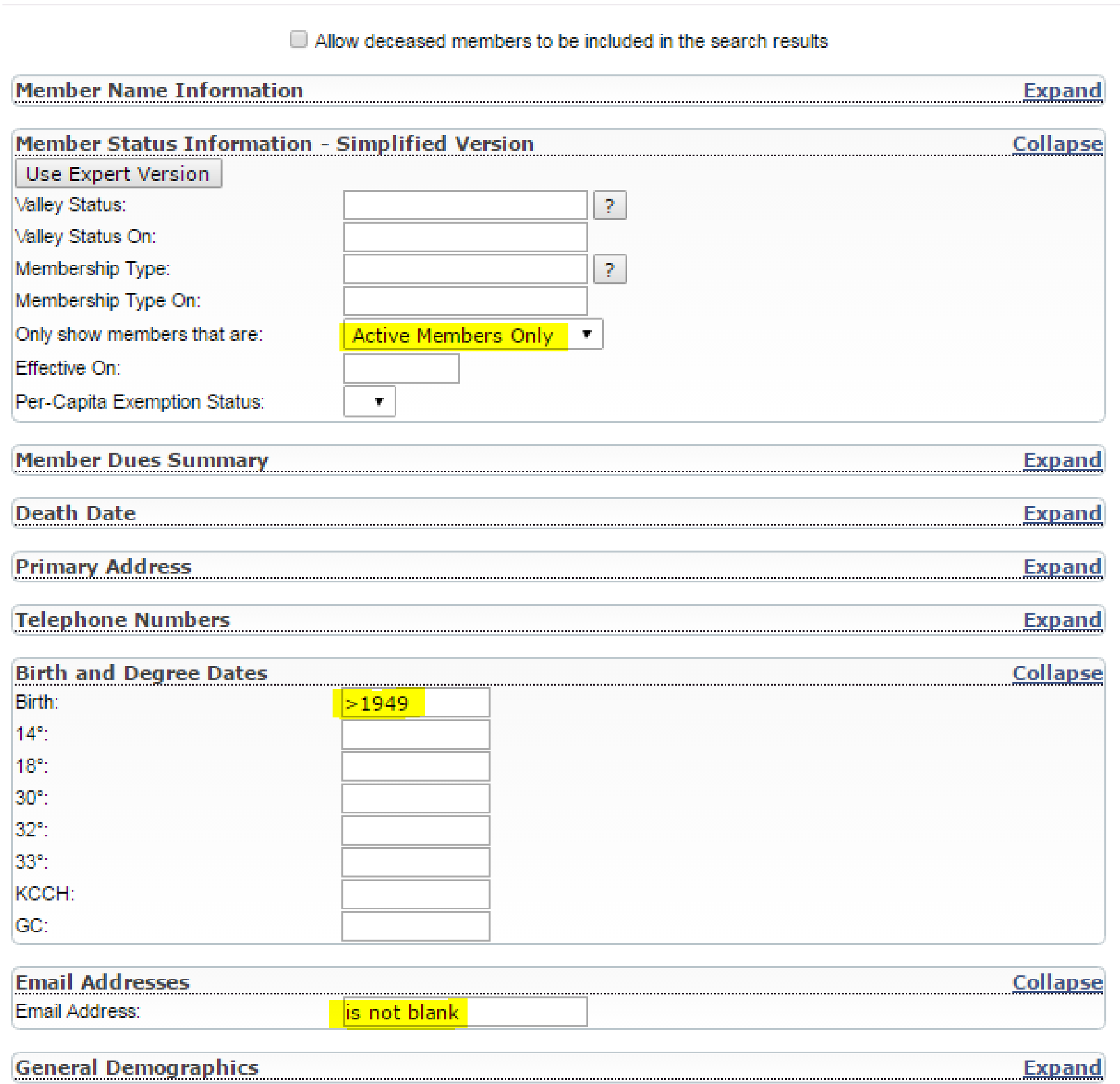
2. Under the **Birth and Degree Dates category**, use the > symbol to tell the system to locate all members who were born from 1950 to the present date. The correct syntax is **>1949.** You can also perform the same search by entering a date range as in 01/01/1950-MM/DD/YYYY where you would fill in the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



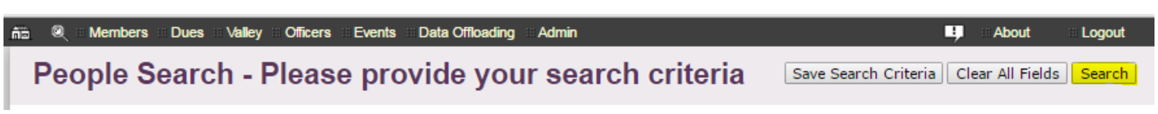
3. In the **Email Address** category, type "is not blank" in the email search field. "is not blank" tells SentinelV2 to look for members who have an email address in their record.



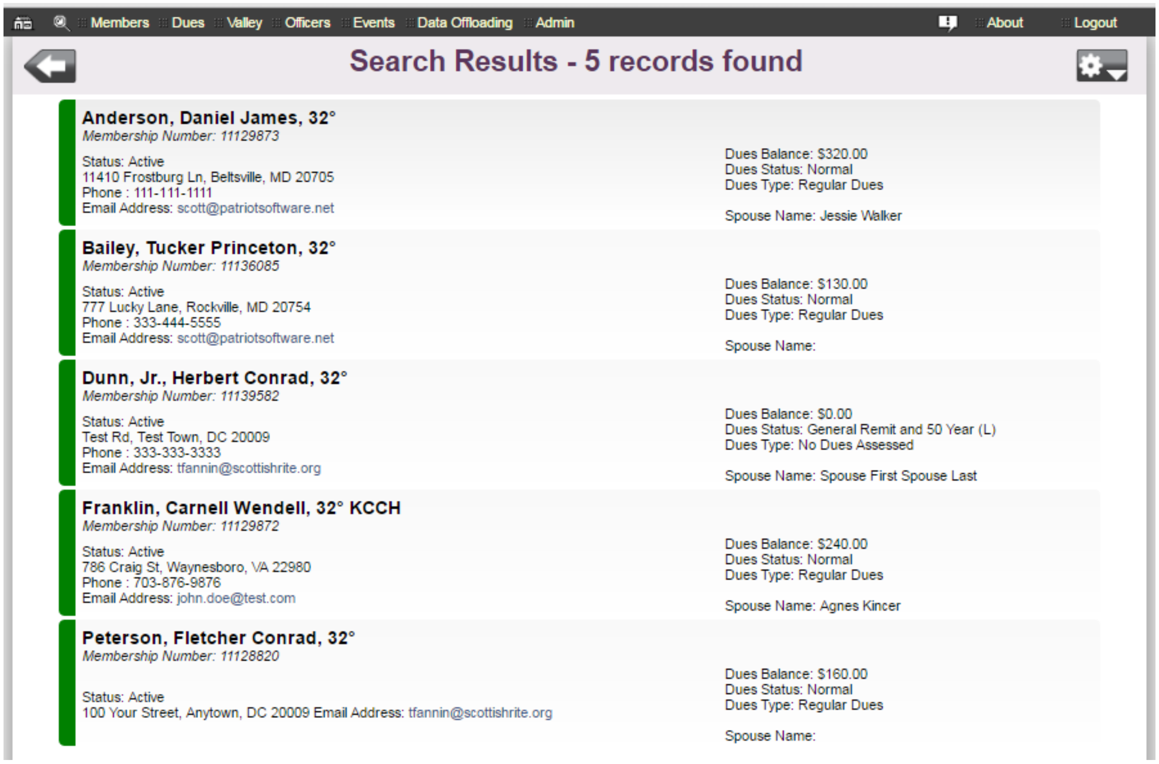
Your completed search should have the following criteria entered. Notice how we have selected from multiple categories.



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



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.

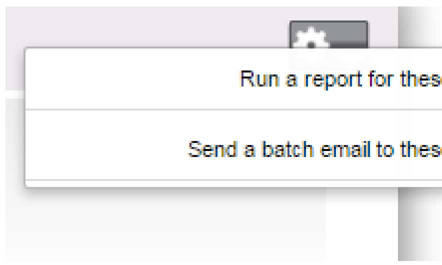
There were five results in my search, so Sentinel will display "1 of 5" or "2 of 5" and so forth depending on which record is displayed on the screen.

EMAILING A GROUP OF MEMBERS

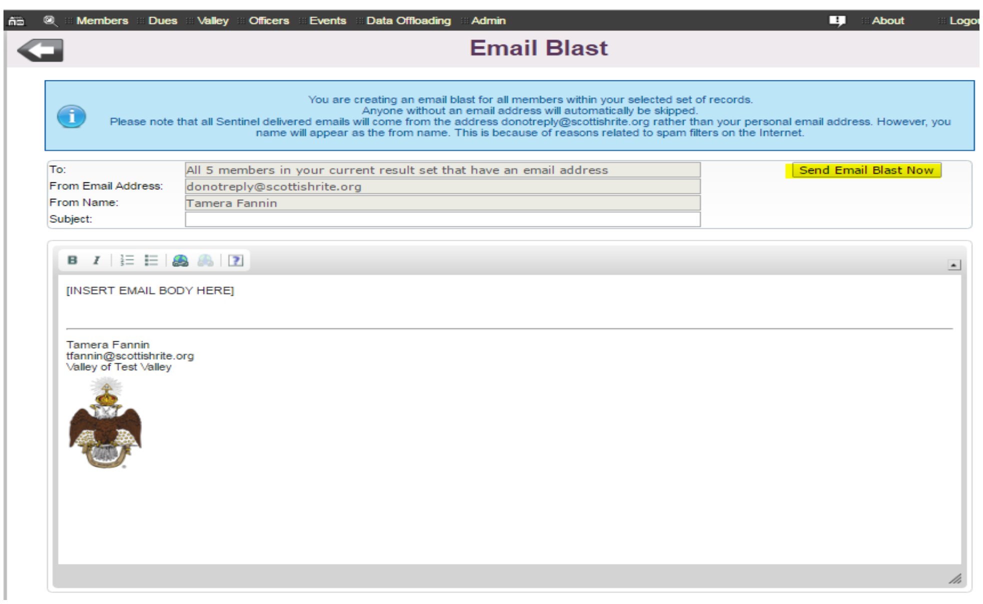
Once you have your search results displayed on the screen as in the figure above you can send each member an email from within SentinelV2.

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.**

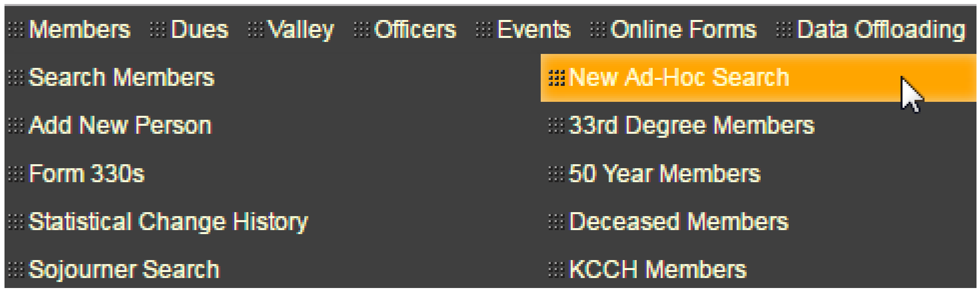


SAVING A SEARCH

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.

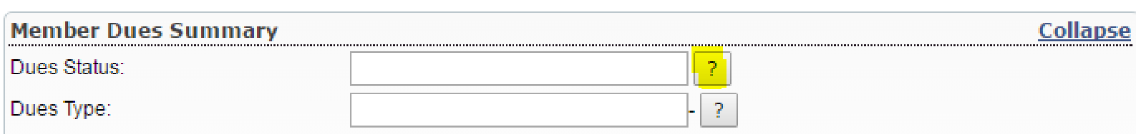
1. First, enter the search criteria by creating a **New Ad-Hoc Search**. **The New Ad-Hoc Search** link is located on the **Members>Search Members** submenu.



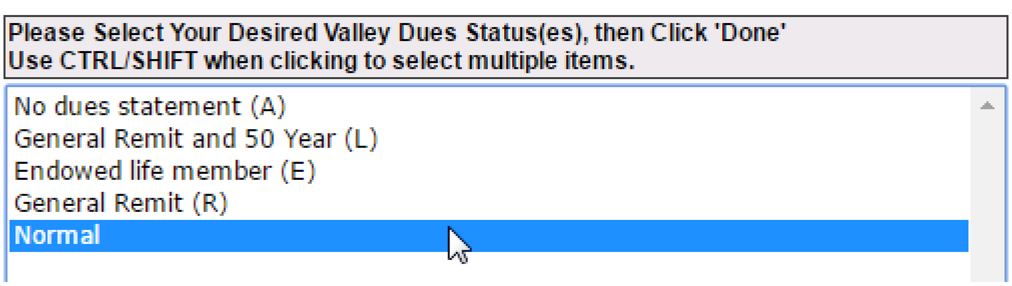
2. Click New Ad-Hoc Search to open the search screen. Under Member Status Information, select Active Members Only from the dropdown list.

3. Open **Member Dues Summary** by clicking the **Expand** button.

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



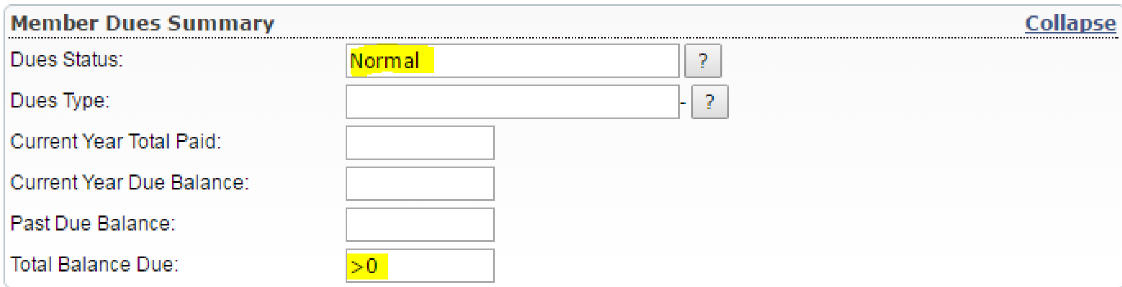
Select "**Normal** " from the list.



5. Click the **Done** button.

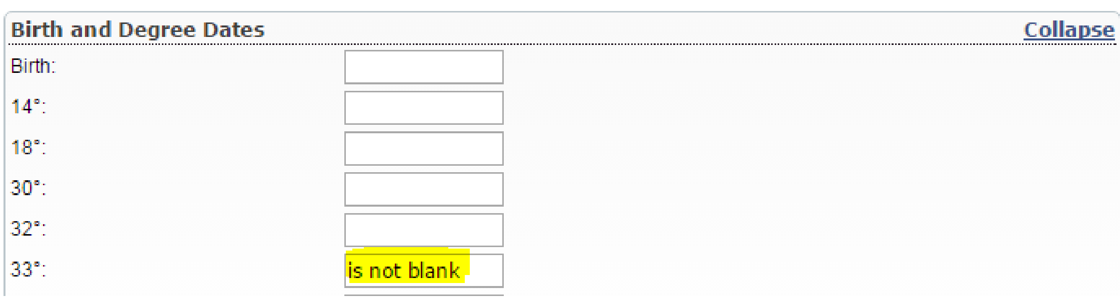
6. We are looking for 33° members who have a balance due of greater than zero, so enter >0 **in the Total Balance Due** field.

   Your **Member Dues Summary** search should look like this:

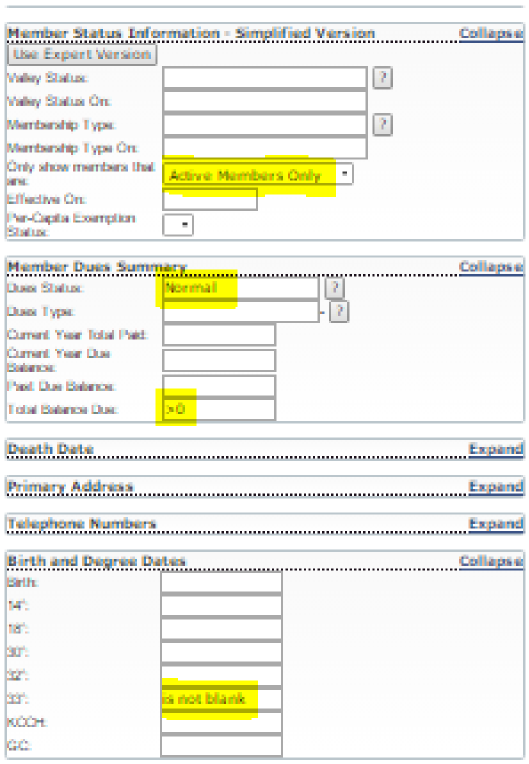


7. Next, tell the system that you want to search for 33^3 members only. Open **Birth and Degree Dates** by clicking the Expand button.

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.

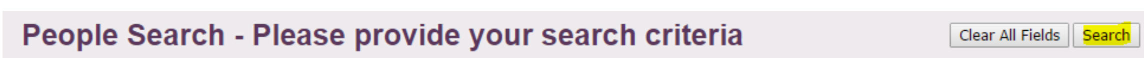


9. All of the search criteria are entered. Let's review. We want all active members who are 33°, normal dues-paying members with a balance due of greater than zero.



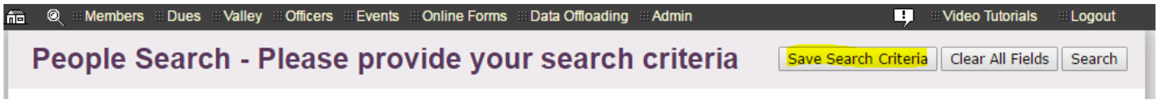
10. This is the tricky and confusing part. You will need to run the search before you can save it.

Click the **Search** button.



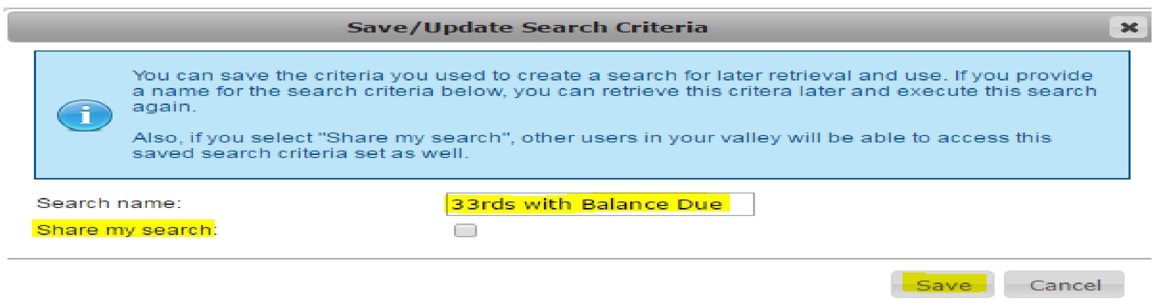
After the results display on the screen, click the **Back** button.

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.

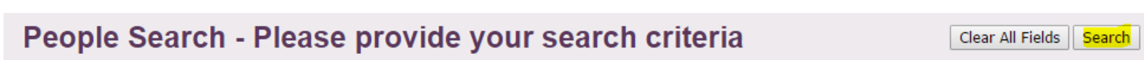


12. The Save Search window opens. Give your search a name. If you want to allow other SentinelV2 users in your Valley to use your saved search, click the **Share my search** checkbox. The search will then appear on their **New Ad-Hoc Search** menu.

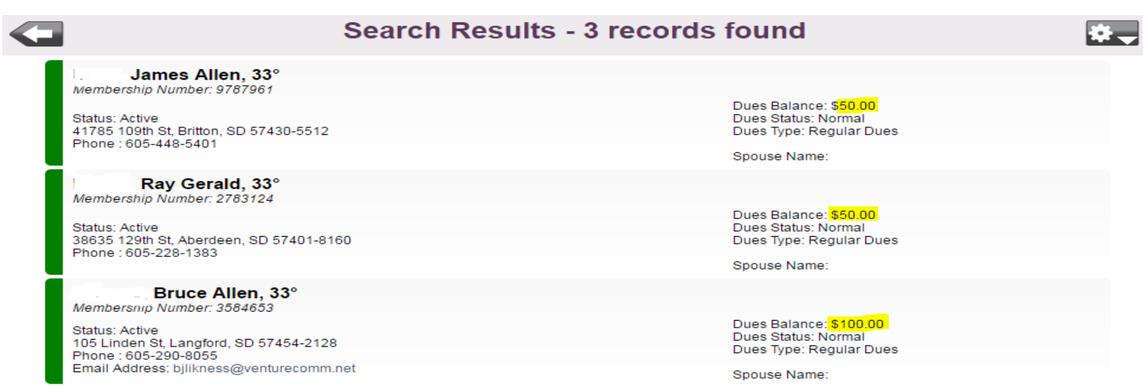
Click the **Save** button.



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

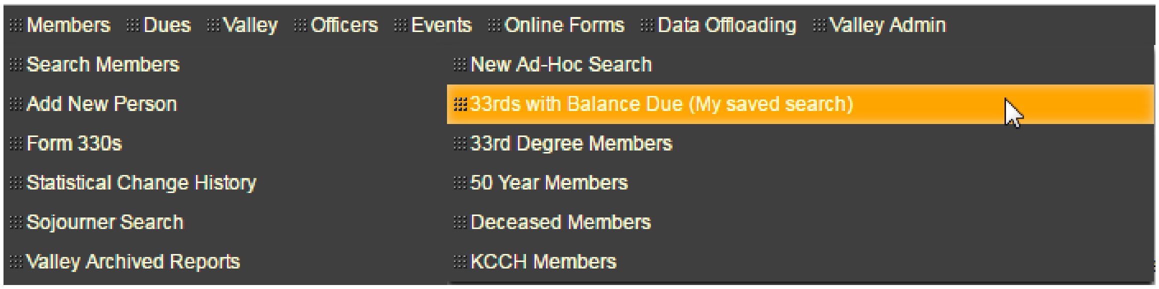


14. SentinelV2 displays the result list:

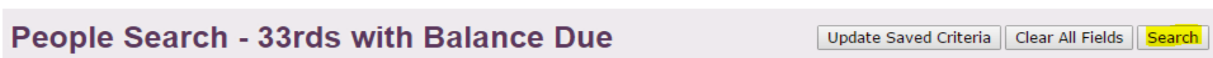


Notice that they are all active 33° with a balance due. (Last names have been purposefully removed)

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.



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.



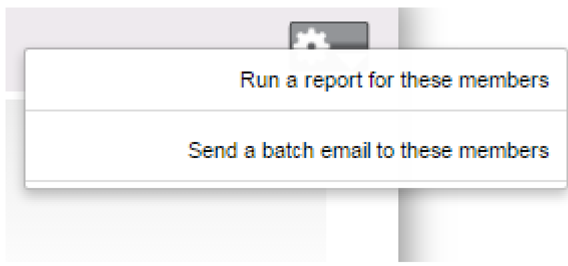
17. One week later, there are now only two unpaid 33° members.

CREATING A REPORT BASED ON SEARCH RESULTS

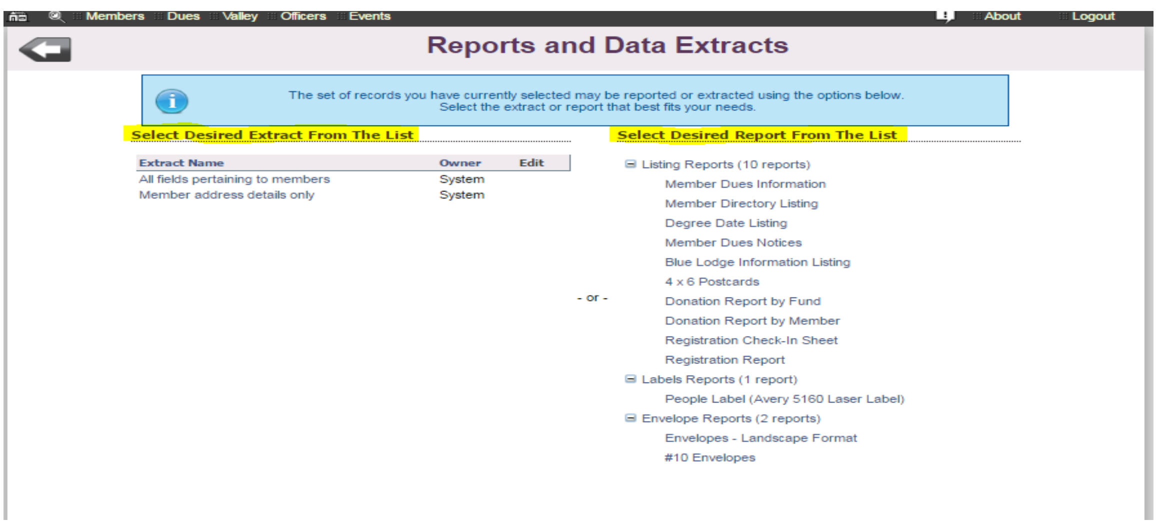
Once you have completed your search, and the search results are displayed on the screen, you can create several different types of reports.

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.



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

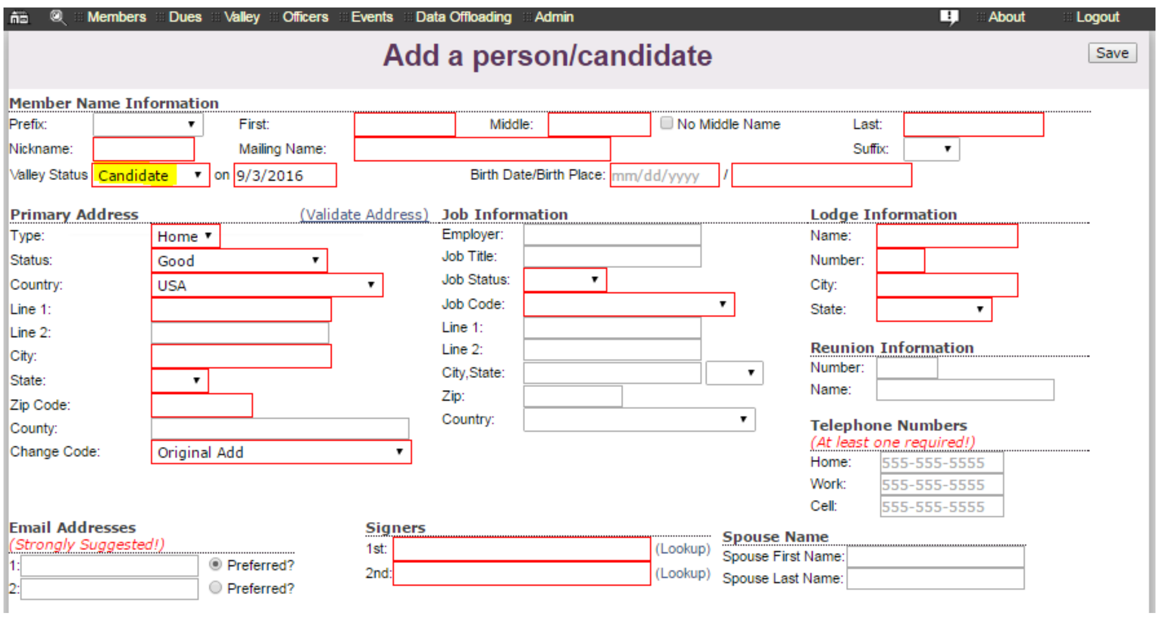
Add New Person is located on the Sentinel menu under **Members**. You will use this person to add both initiation Candidates and nonmember records. An example of a nonmember record would be a Blue Lodge or a widow whom you want to add to your mailing list.

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.**

2. 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."

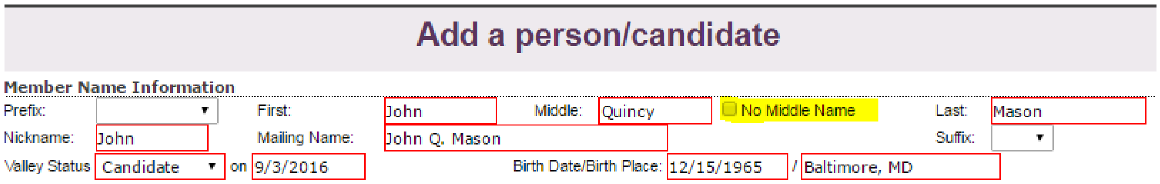


Boxes on the Add Person/Candidate screen that are outlined in red identify information that is required by the system.

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.



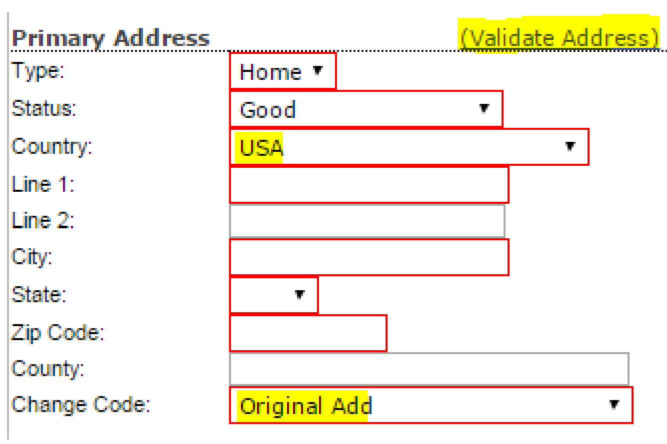
If your member does not have a middle name, click the **no middle name** check box to turn off the restriction on the middle name.

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.

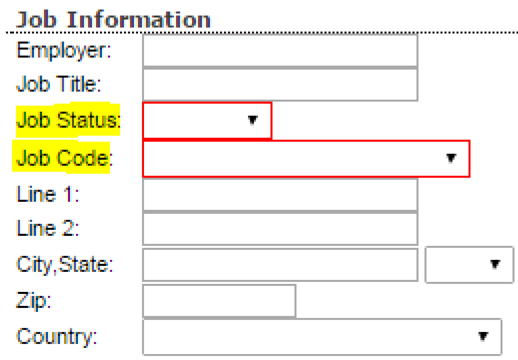
3. Next, enter the **Primary Address** information. The address **Type** will default to **Home**. You can click the downward area to open a **Type** menu to make another selection. The Country will default to USA. If you need to enter another country, click the downward arrow to the right of USA. It 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.

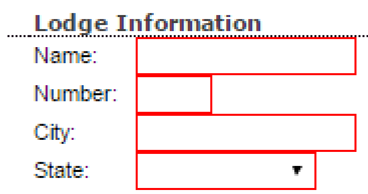


5. Enter the **Job Information.** The **Job Status** and **Job Code** are required. However, please enter as much information as you have available. To choose a **Job Status** and **Job Code**, click the downward arrow to open the menu The **Job Status** options are “Current, Former, Retired and Other.” 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.

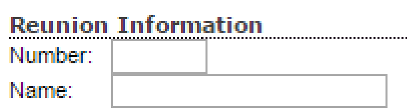


6. Enter the **Lodge Information**. All fields are required. To choose a state, click the downward arrow to display the list of states and US territories. Make your selection by highlighting a state.

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



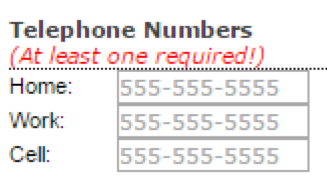
7. Enter the **Reunion Information**. This information is not required by the system, but please enter the Number and Name if they apply.



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.

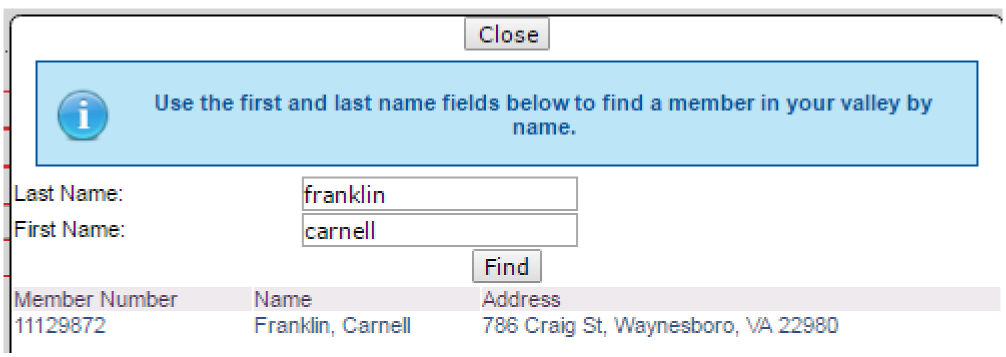


9. Enter the **Email Addresses**. Because some members do not have an email address, this information is not required, but as you can see below, it is "Strongly suggested" that you add available emails. If a

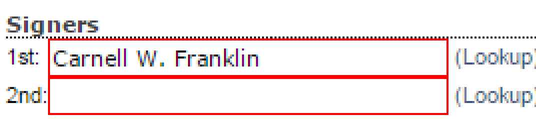
member has more than one email, you can enter a second. Identify the most used email address by clicking radio button next to **Preferred**. It is better to enter the **Preferred** email address first.

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.

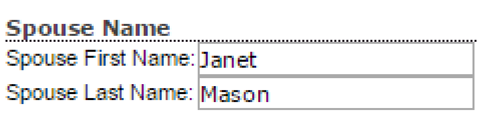
After you click **Lookup**, the search window will open. Enter the first and last name of the signer, and then click the **Find** button. Click the signers name to select it. If you are searching for a common name such as John Smith, you may have multiple results from which to select a name. Use the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



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.

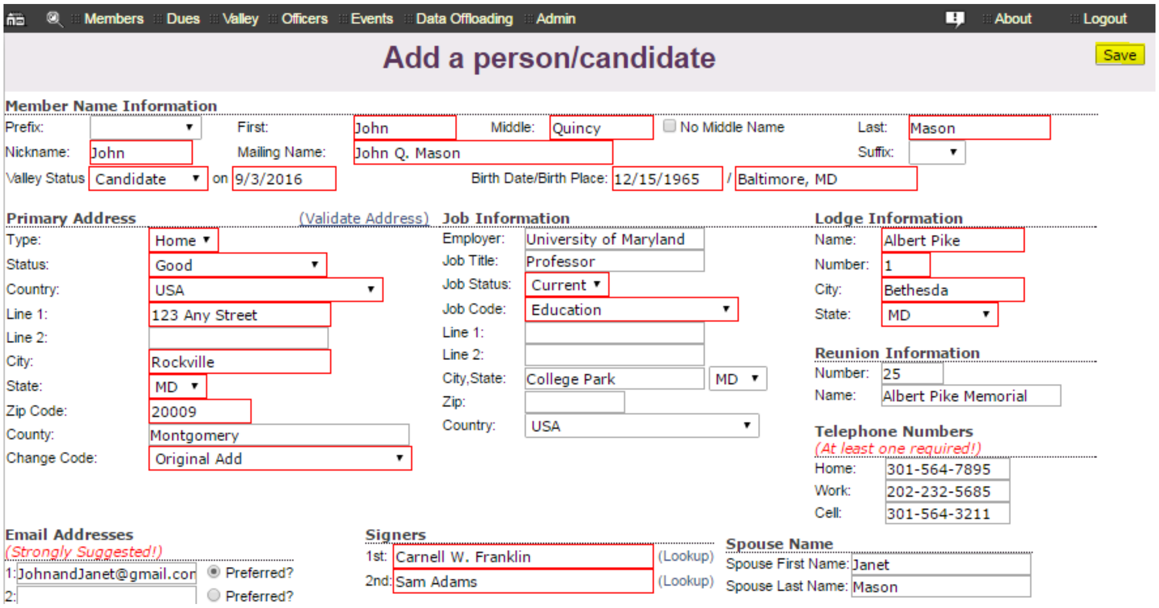


11. Add the **Spouse Name** (if applicable). Type the first and last name into the appropriate boxes.



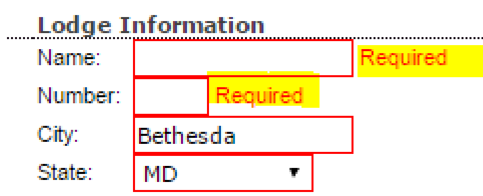
12. Now you are ready to save your new member addition. You entry should look similar to the figure below.

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

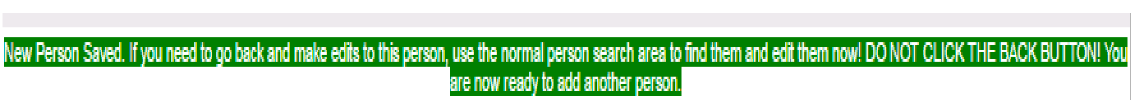


If you entered all of the appropriate information, SentinelV2 will display the following message at the top of the screen:

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.



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



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.

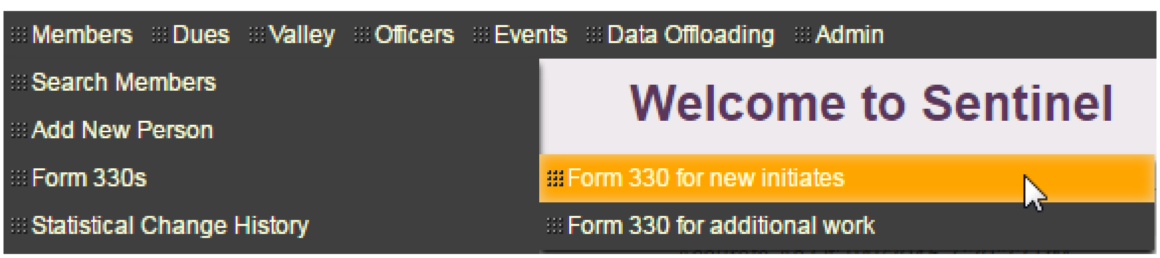
- **Form 330 for Additional Degrees**. Use this form if you are reporting members who have already taken at least the Lodge on a prior date and already have an existing SentinelV2 record. For instance, if a member received Degrees in the Lodge and Chapter in the Spring Class and is now taking the Chapter 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

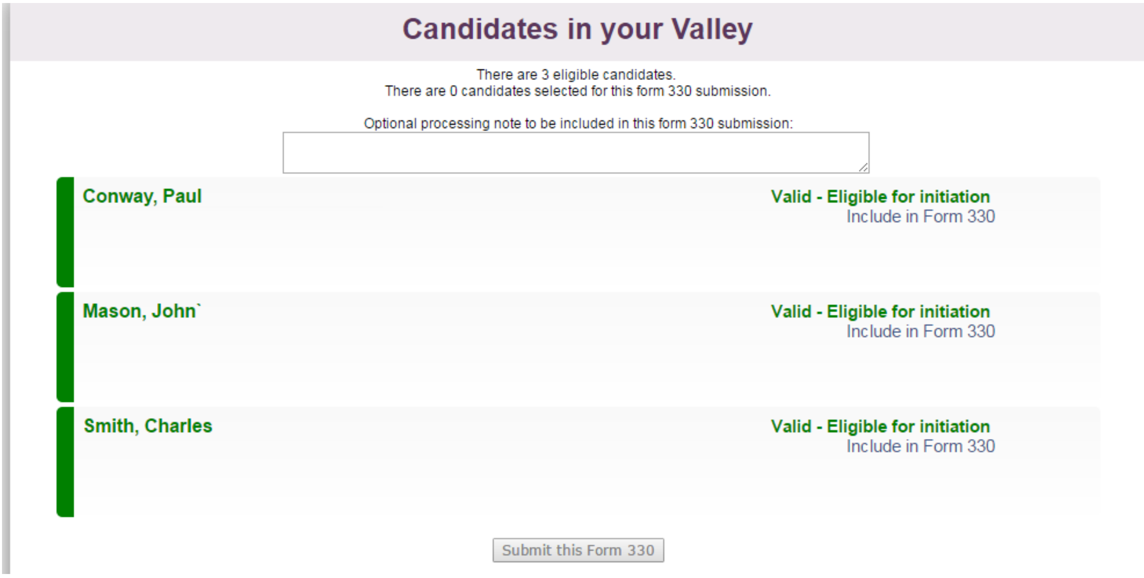
CREATING A FORM 330 FOR INITIATES

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**.

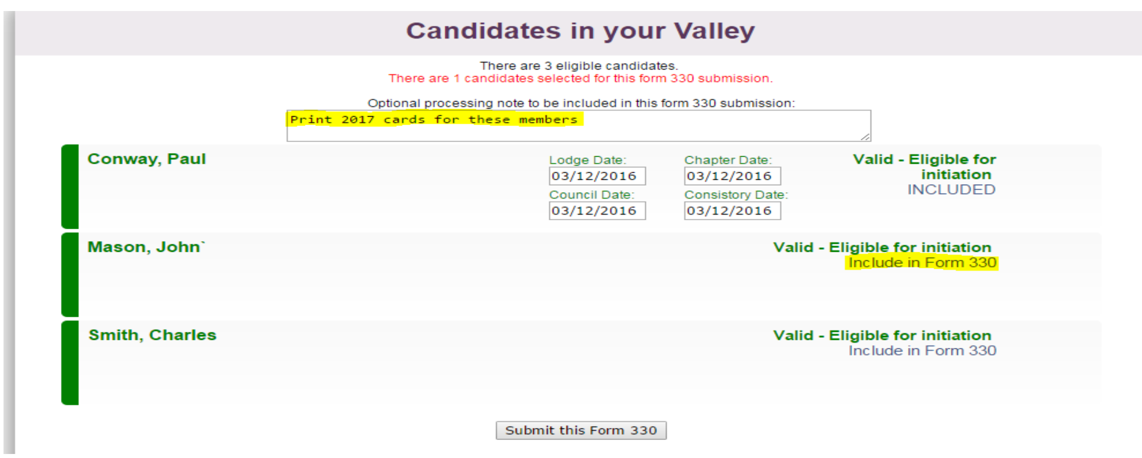


2. The **Candidates in Your Valley** page will display the members that you have added as Candidates. The word, "**Valid**" next to each entry shows that you have entered all of the required information so that each member can be added to the form. If any members are displaying as "**invalid**," that 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.



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.



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."

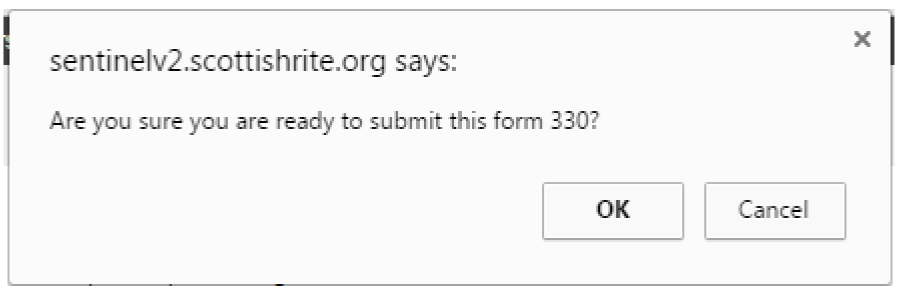
6. Paul Conway is now added to the Form 330 and is labeled "Included." Next, add John Mason by clicking on Include in Form 330. The system will automatically enter the Degree dates in the Degree boxes for John Mason. If you need to remove any of the dates or change the dates, click in the appropriate 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.

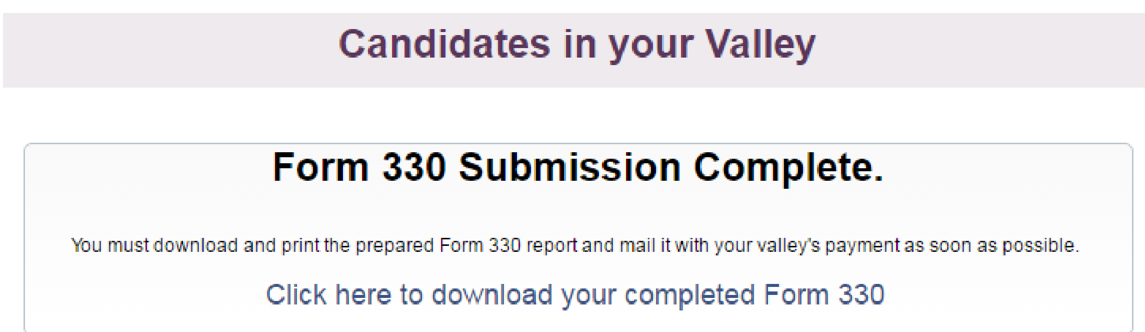
7. The sample completed page looks like the following:

8. When you are finished adding Initiates, click **Submit this Form 330**.

9. Click OK to continue.



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



Here is the completed form:

9/9/2016 — Form 330 - Statement of Fees and Report of Investitures — Page 1 of 1
Valley of Test Valley in the Orient of US

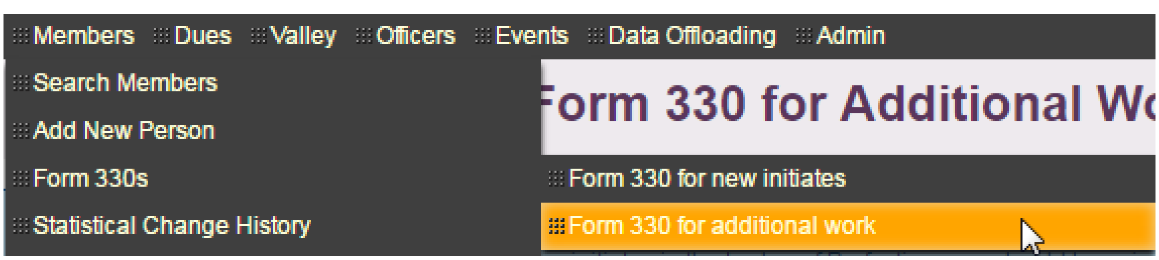
	Lodge	Chapter	Council	Consistory	Fees
Paul Cecil Conway 11153192 567 Blair Road Albert Pike(1) Washington, DC Birth Date: 01/01/1900 Birth Place: Bethlehem, PA *Print 2017 cards for these members*	03/12/2016	03/12/2016	03/12/2016	03/12/2016	$31.00
John` Quincy Mason 11153191 123 Any Town Albert Pike(1) 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 11153193 4567 Trace Way Albert Pike(1) Washington, DC Birth Date: 01/01/1900 Birth Place: Waco, TX *Print 2017 cards for these members*	03/12/2016	03/12/2016	03/12/2016	03/12/2016	$31.00
				Total 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 SentinelV2 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.**



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.

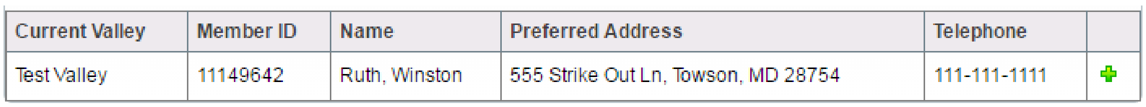
Form 330 for Additional Work

This search will only locate prospective members to be reported on a Form 330 in the chapter, council or consistory.
If you need to report new initiates in the Lodge 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:	Test Valley

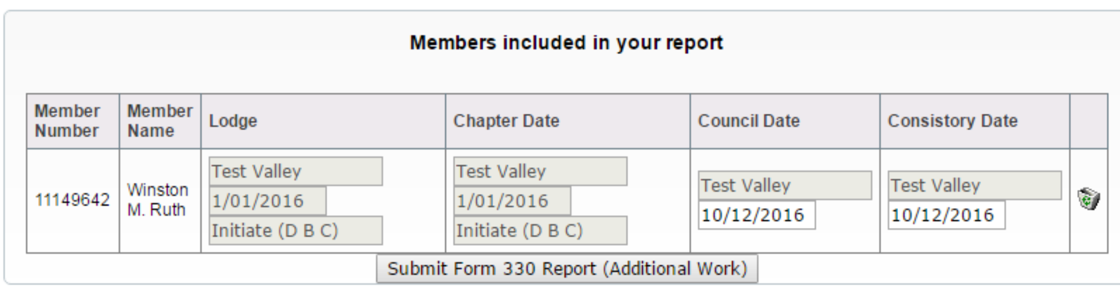
Find Candidate

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.



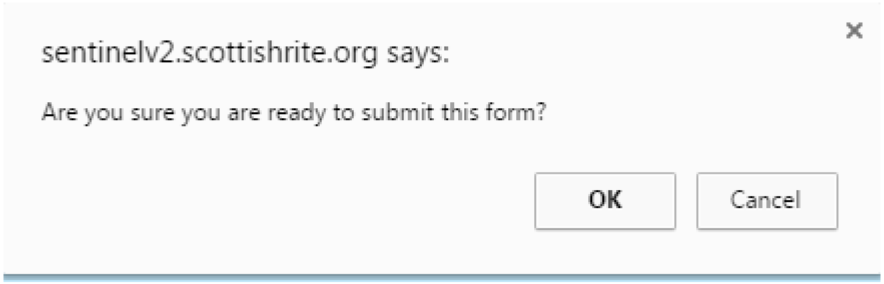
Members included in your report

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	

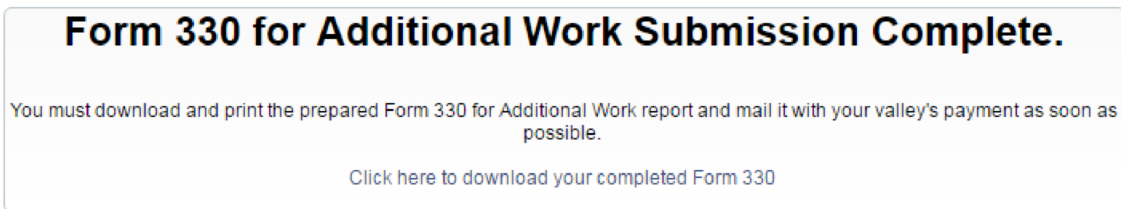
Submit Form 330 Report (Additional Work)

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.

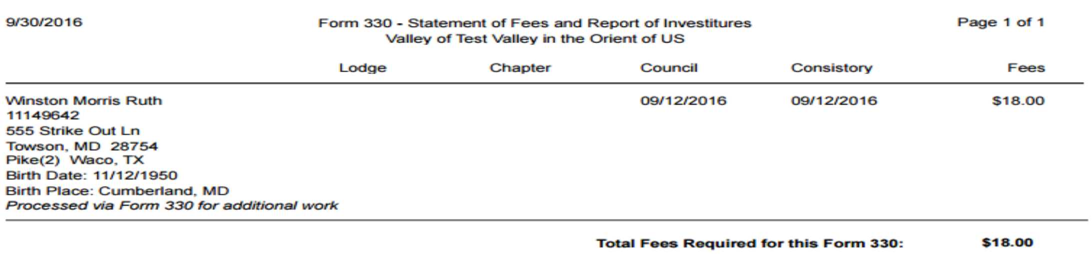
6. SentinelV2 will ask you if you are ready to submit the form. If yes, click **OK**.



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 Page 1 of 1

Valley of Test Valley in the Orient of US

	Lodge	Chapter	Council	Consistory	Fees
Winston Morris Ruth 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 additional work*			09/12/2016	09/12/2016	$18.00

Total Fees Required for this Form 330: $18.00

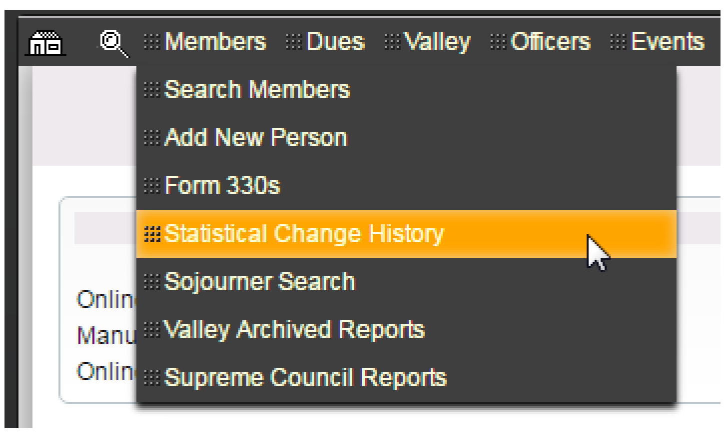
STATISTICAL CHANGE HISTORY

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."

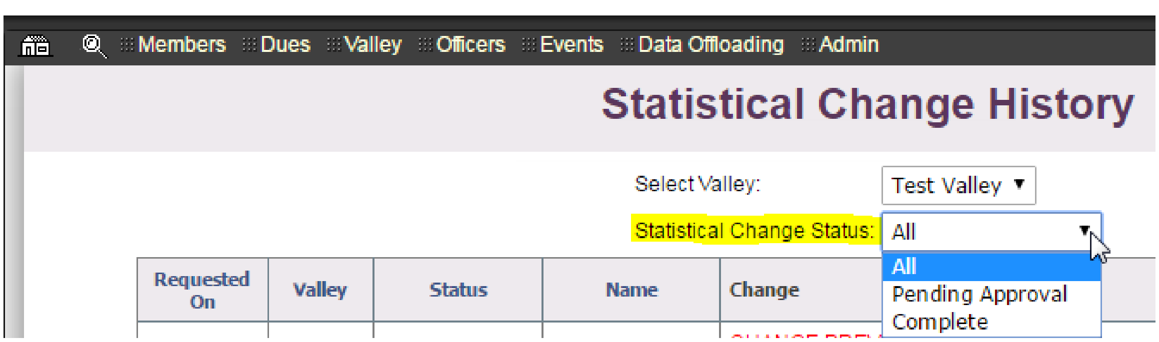
All statistical changes are reported electronically to the Computer Services staff of the Supreme Council where they are reviewed for accuracy and then applied to the member's record.

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.



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

Statistical Change History

Select Valley: Test Valley

Statistical 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 Valley	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

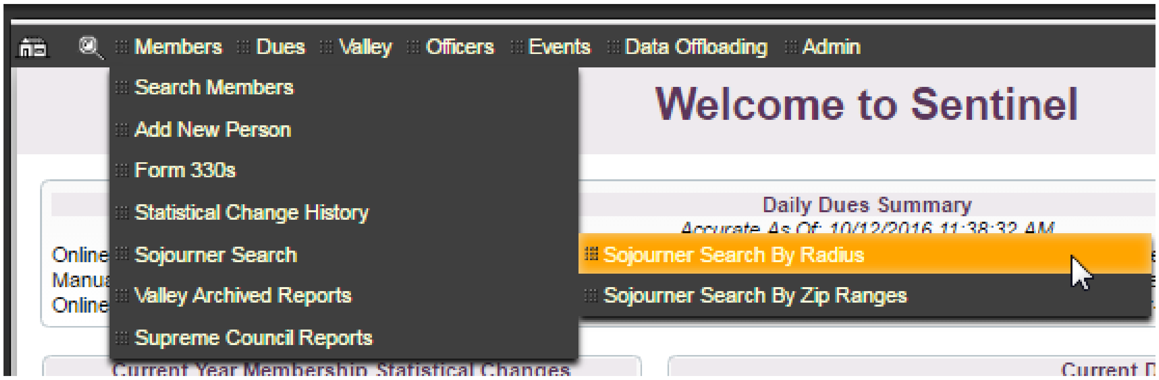
Sojourners are Scottish Rite, Southern Jurisdiction, members who reside in an Orient but are not members of any Valley in that Orient. SentinelV2 provides two ways to search an Orient for Sojourners: **Sojourner Search by Radius** and **Sojourner Search by Zip Ranges**.

SOJOURNER SEARCH BY RADIUS

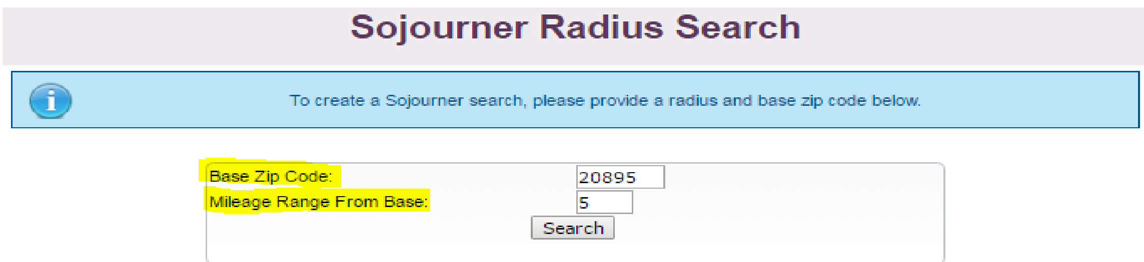
The **Sojourner Search by Radius** allows you to identify Sojourners who live a certain number of miles from a particular zipcode.. For instance, you can find all of Sojourners who live within five miles of the zipcode 20895. In essence, the radius search creates a circle around a zip area and returns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

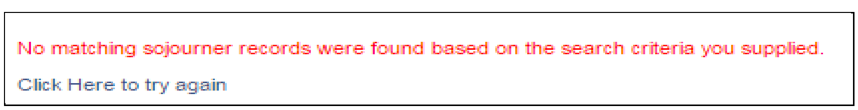


2. Enter a **Base Zip Code** and a **Mileage Range from Base**. For this example, we will use 20895. Click the **Search** button.

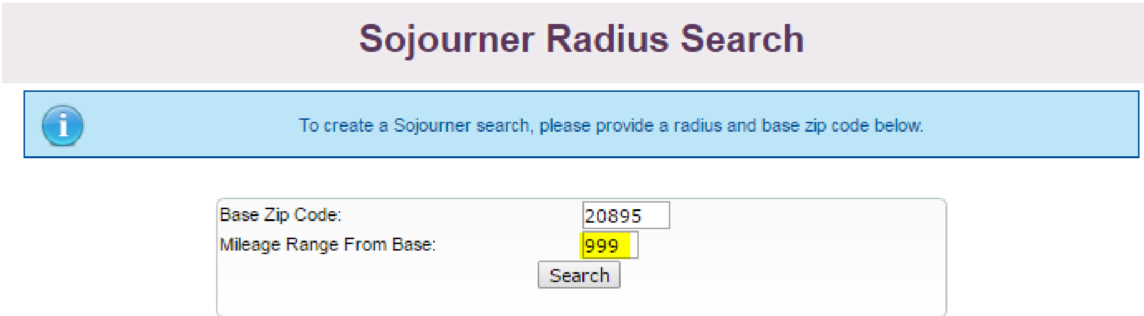


SentinelV2 will display a list of results on the screen. Regretfully, we cannot display the results of a Sojourner Search in this training guide because we cannot publish actual member addresses and contact information, but please give it a try to see how it works.

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:

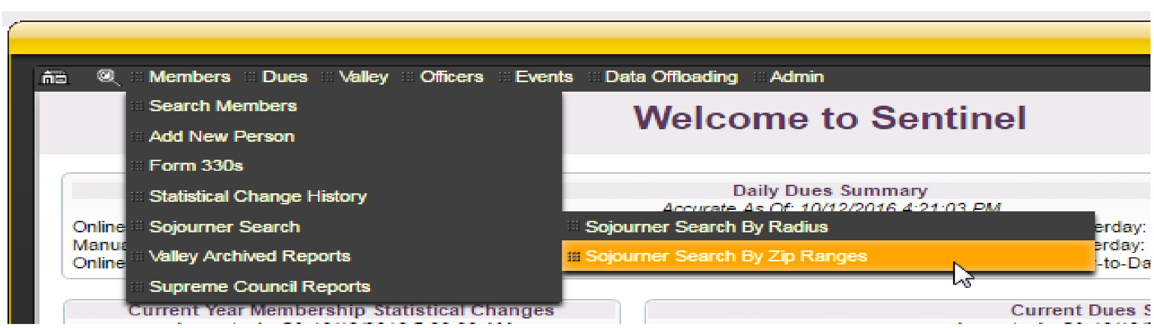


SOJOURNER SEARCH BY ZIP RANGES

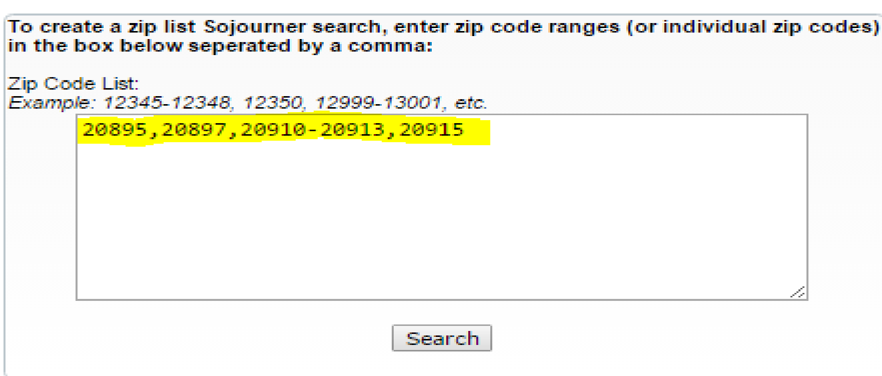
The **Sojourner Search by Zip Ranges** allows you to identify Sojourners who live within a single zipcode area or in a range of zip code areas.. For instance, you can find all of Sojourners who have a zipcode of 20895, or 20895-20899. You can mix the search critera to include mutiple zipcodes and zipcode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



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.

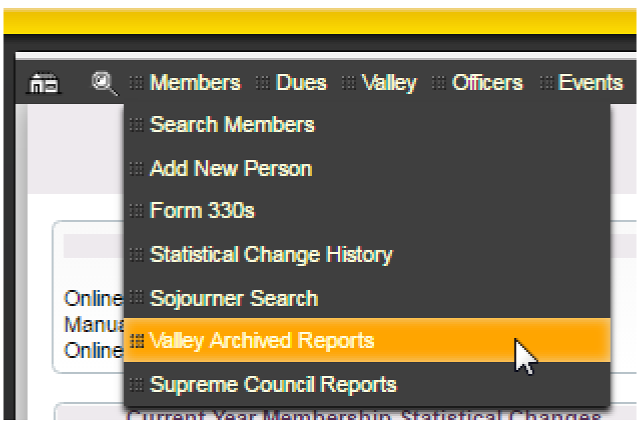
If there are no Sojourners in your search area, Sentinel will display the following message:

> No matching sojourner records were found based on the search criteria you supplied.
>
> Click Here to try again

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**.

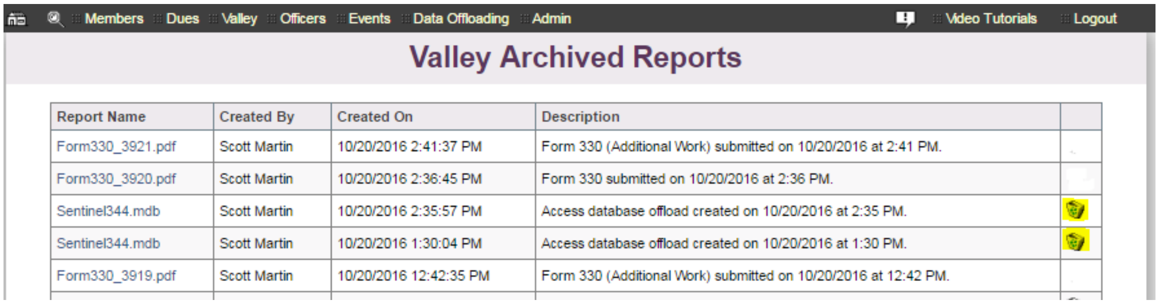
To view your saved reports, click **Valley Archived Reports** on the **Members** Menu.



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.

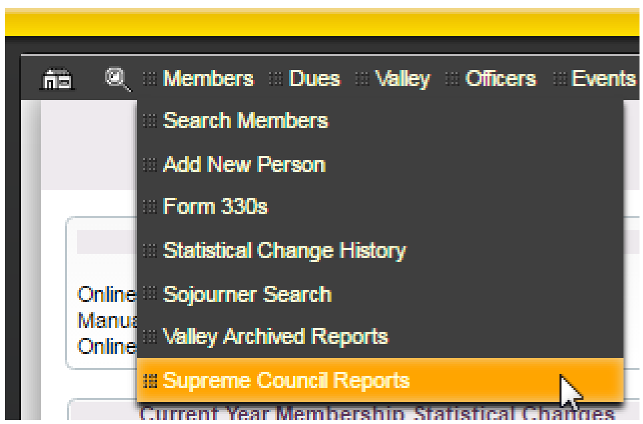


Report Name	Created By	Created On	Description
Form330_3921.pdf	Scott Martin	10/20/2016 2:41:37 PM	Form 330 (Additional Work) submitted on 10/20/2016 at 2:41 PM.
Form330_3920.pdf	Scott Martin	10/20/2016 2:36:45 PM	Form 330 submitted on 10/20/2016 at 2:36 PM.
Sentinel344.mdb	Scott Martin	10/20/2016 2:35:57 PM	Access database offload created on 10/20/2016 at 2:35 PM.
Sentinel344.mdb	Scott Martin	10/20/2016 1:30:04 PM	Access database offload created on 10/20/2016 at 1:30 PM.
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.

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

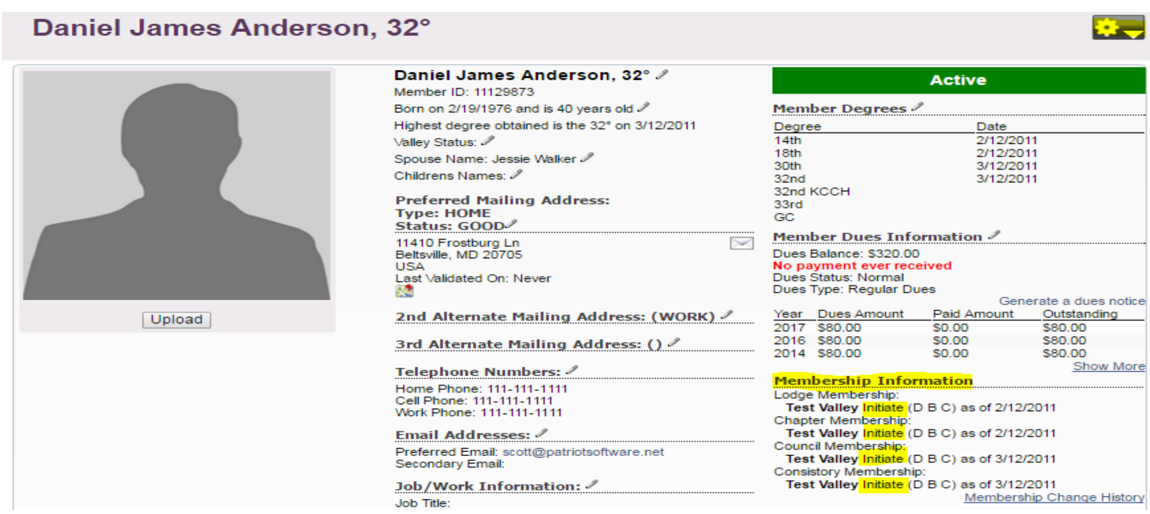
We define a member's status as his current relationship with his Scottish Rite Valley—that is, his current status or relationship is either as an initiate, reinstatement, affiliation, demission, expulsion, or death. A member's current status displays on his **Profile Screen** under Member **Information**.

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

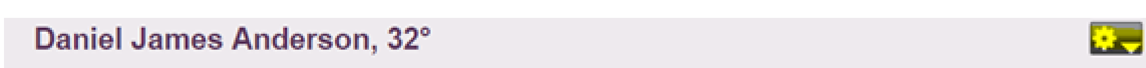
CHANGE A MEMBER'S STATUS (SUBMIT STATISTICAL CHANGE)

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 SentinelV2 will show his current "Demit" status along with the effective date of the demit.

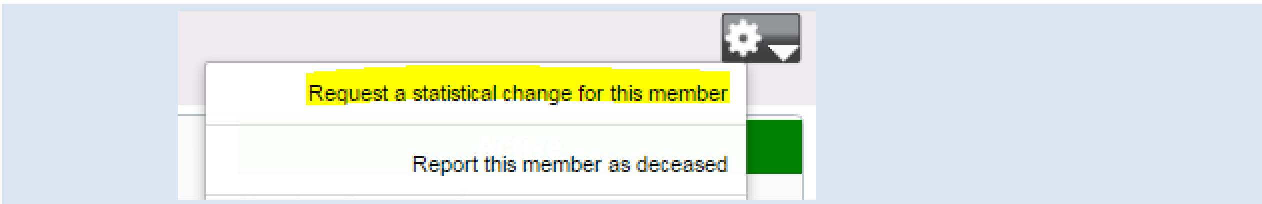


Follow these steps to change the member's current status from "Initiate" to "Demit."

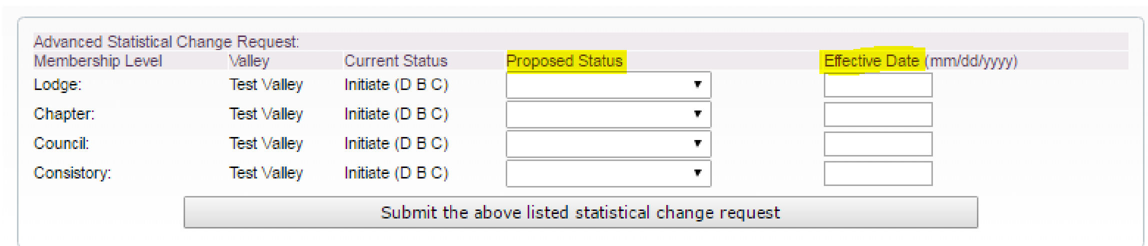
1. On the member's **Profile Screen,** click the "gear" icon in the upper right corner.



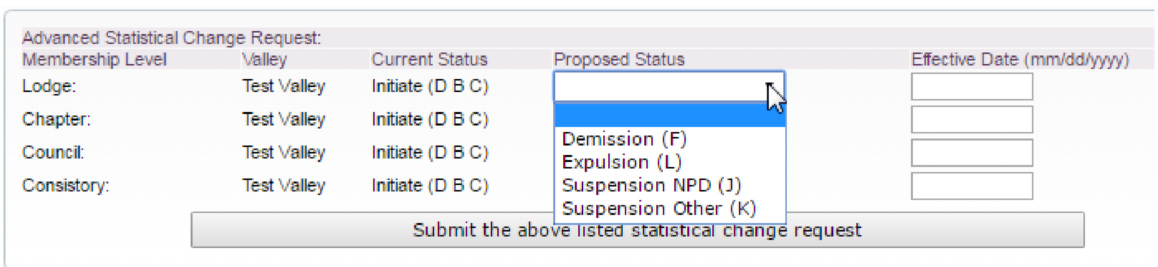
2. On the menu that opens, click Request a statistical change for this member.



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.



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



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:

Advanced Statistical Change Request:

Membership Level	Valley	Current Status	Proposed Status	Effective Date (mm/dd/yyyy)
Lodge:	Test Valley	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

Submit the above listed statistical change request

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."

This member has an existing pending change request that has yet to be approved.

Request submitted by Tamera Fannin on 10/21/2016

Membership Level	Valley	Current Status	Proposed Status	Effective Date
Lodge:	Test Valley	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

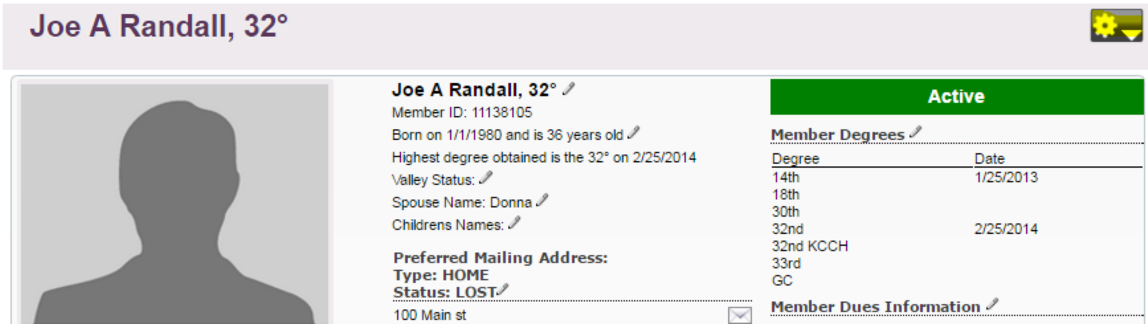
The member's **Profile Screen** will also display that a "Pending" change is present, and the notice will remain on his record until the change is reviewed and activated by the Supreme Council Computer Services' staff.

CHANGING A MEMBER'S STATUS TO DECEASED

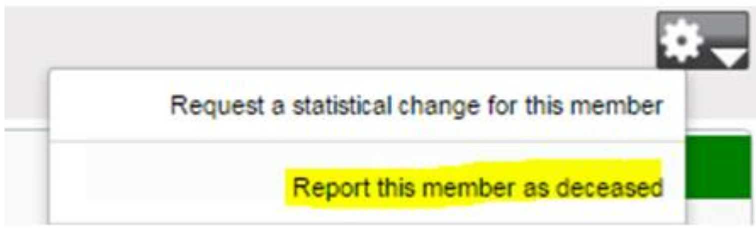
When a member dies, you will need to enter his date of death in his membership record. This is done on his **Profile Screen**. Once you enter the date of death and save it, the system applies the change to his record in real time—that is, you do not need to submit an electronic request to the Supreme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

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

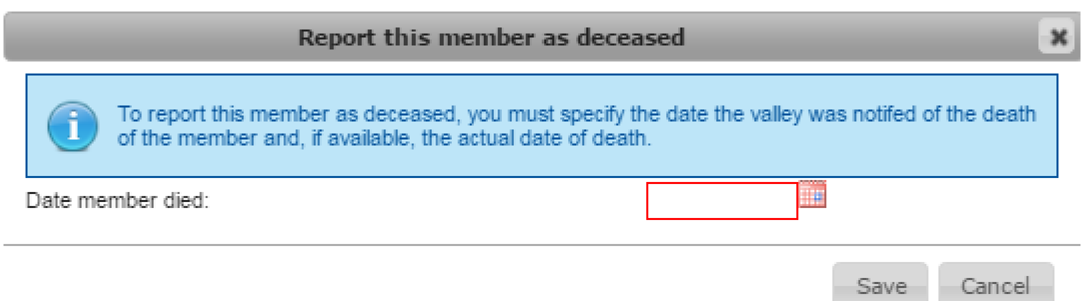
1. On the member's Profile Screen, click the "gear" icon in the upper right corner to open the status change menu.



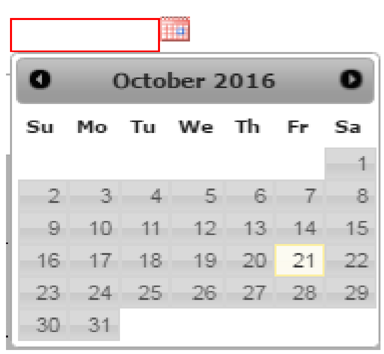
2. When the menu opens, click Report this member as deceased.



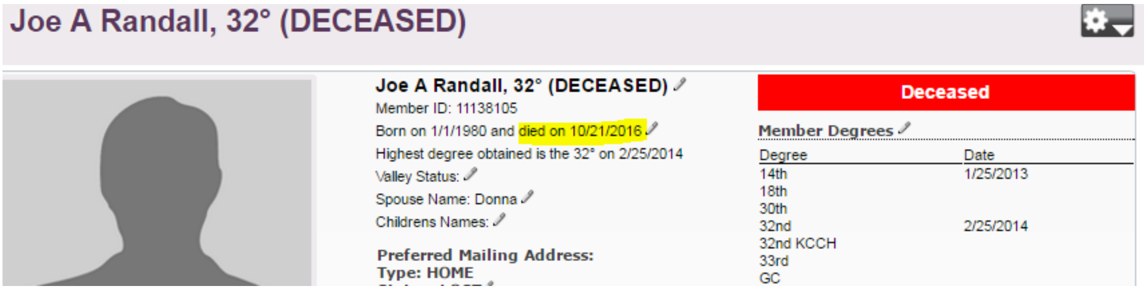
3. The update window will appear on your screen.



You can also use the calendar to choose a date.



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



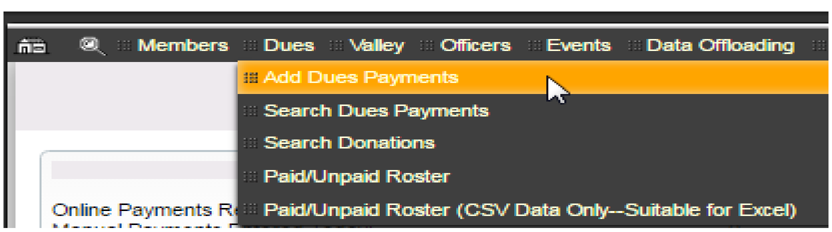
CHAPTER 5: THE DUES MENU

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.

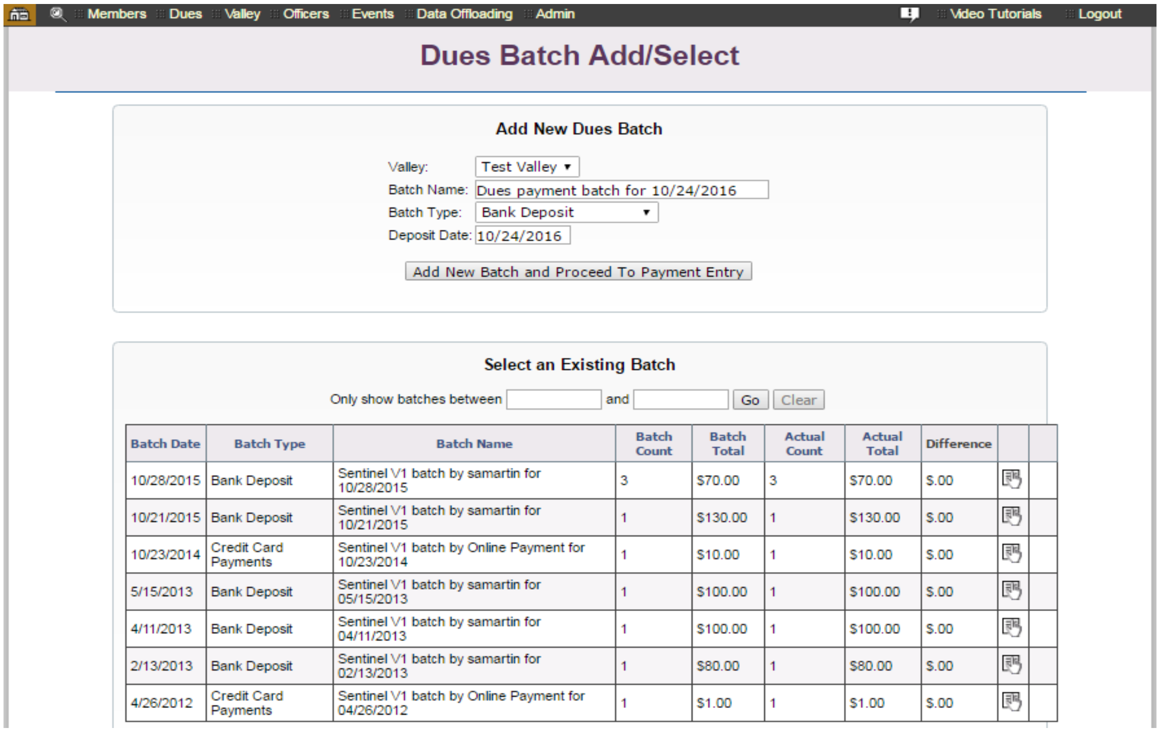
ADD DUES PAYMENTS

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.

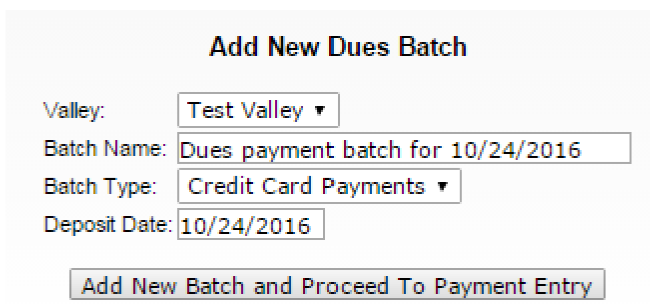


Click on Add Dues Payments to open the Dues Batch Add/Select screen.

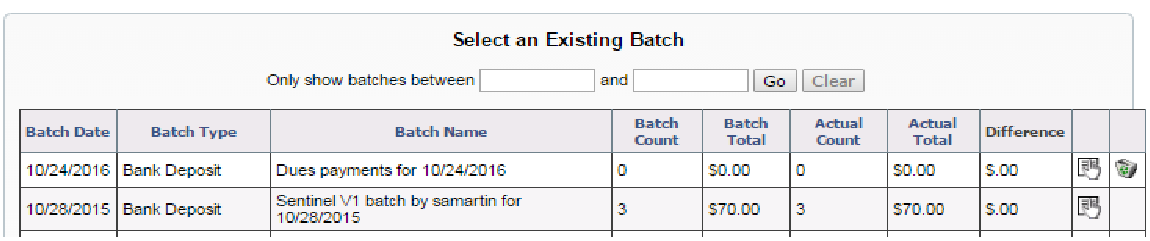


Batch Date	Batch Type	Batch Name	Batch Count	Batch Total	Actual Count	Actual Total	Difference		
10/28/2015	Bank Deposit	Sentinel V1 batch by samartin for 10/28/2015	3	$70.00	3	$70.00	$.00		
10/21/2015	Bank Deposit	Sentinel V1 batch by samartin for 10/21/2015	1	$130.00	1	$130.00	$.00		
10/23/2014	Credit Card Payments	Sentinel V1 batch by Online Payment for 10/23/2014	1	$10.00	1	$10.00	$.00		
5/15/2013	Bank Deposit	Sentinel V1 batch by samartin for 05/15/2013	1	$100.00	1	$100.00	$.00		
4/11/2013	Bank Deposit	Sentinel V1 batch by samartin for 04/11/2013	1	$100.00	1	$100.00	$.00		
2/13/2013	Bank Deposit	Sentinel V1 batch by samartin for 02/13/2013	1	$80.00	1	$80.00	$.00		
4/26/2012	Credit Card Payments	Sentinel V1 batch by Online Payment for 04/26/2012	1	$1.00	1	$1.00	$.00		

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.**



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



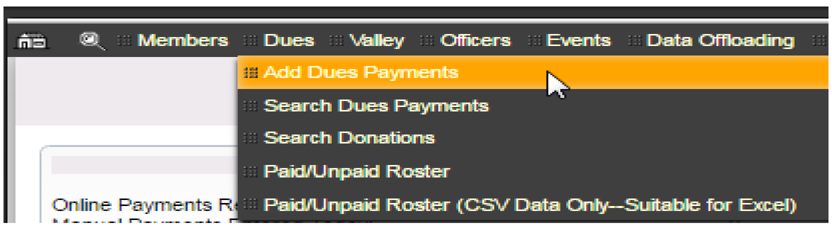
Batch Date	Batch Type	Batch Name	Batch Count	Batch Total	Actual Count	Actual Total	Difference		
10/24/2016	Bank Deposit	Dues payments for 10/24/2016	0	$0.00	0	$0.00	$.00		
10/28/2015	Bank Deposit	Sentinel V1 batch by samartin for 10/28/2015	3	$70.00	3	$70.00	$.00		

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

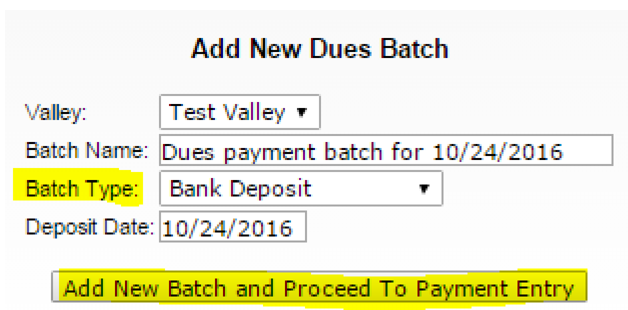
ADD A NEW DUES BATCH

Follow these instructions to add a brand new dues batch:

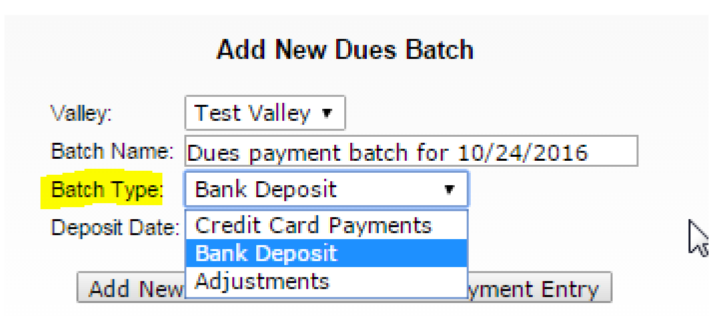
1. Click the **Add Dues Payment** option on the **Dues** tab on the SentinelV2 black menu bar.



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.

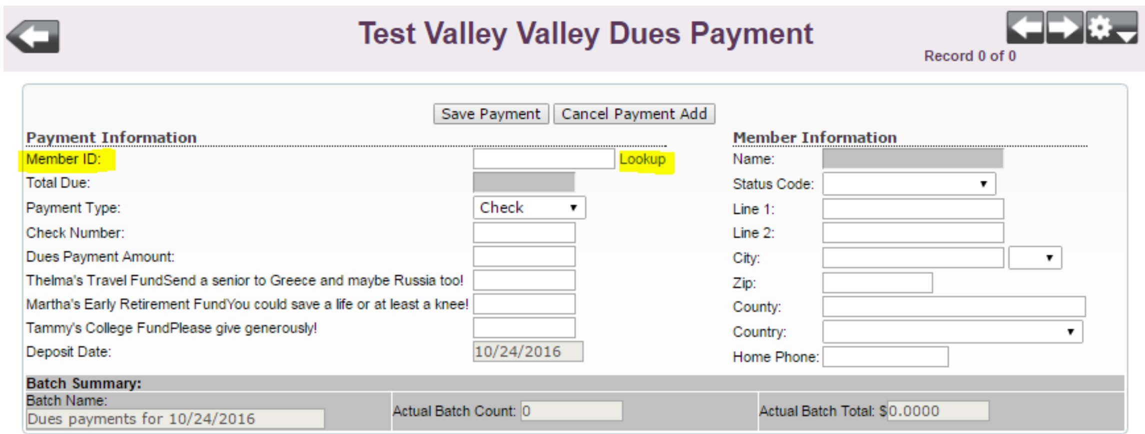


3. Use the Batch Type dropdown menu to choose the type of batch you are entering: **Bank Deposit** (cash and checks), **Credit Card**, or **Adjustment**. For this example we are choosing **Bank Deposit**

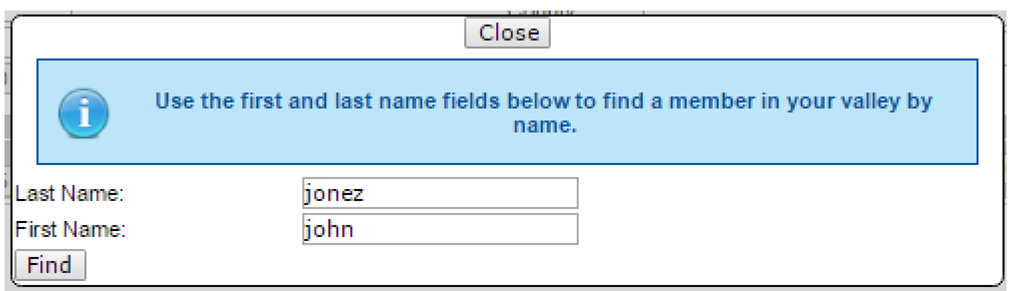


4. Click **Add New Batch** and Procceed to Payment Entry.

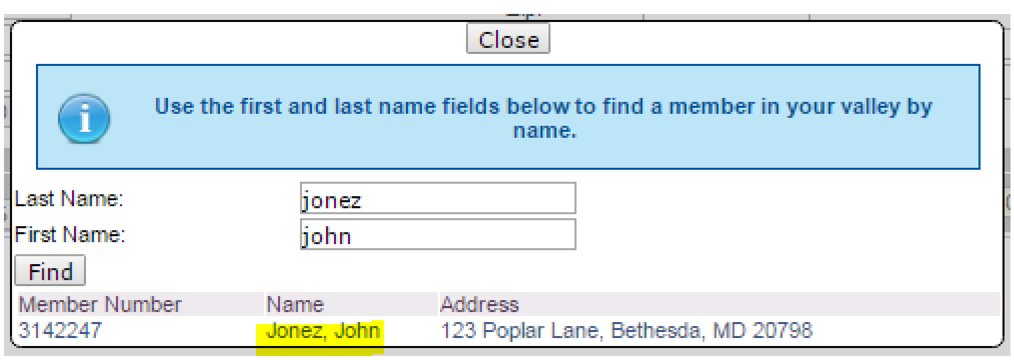
5. The **Valley Dues Payment** screen will open. Type the member's identification number in the **Member ID** box and press the "Tab" key on your keyboard.



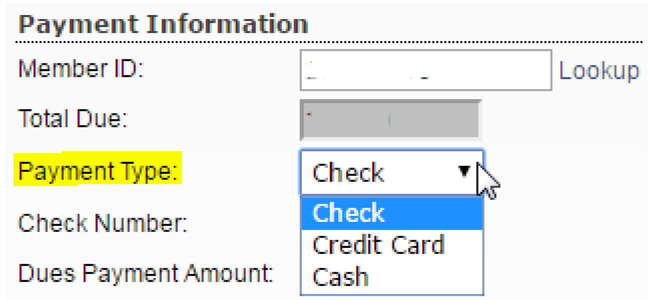
If you do not have an ID number, you can use the **Lookup** feature. Click **Lookup**. Enter the member's name in the window that opens and click **Find**.



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



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.



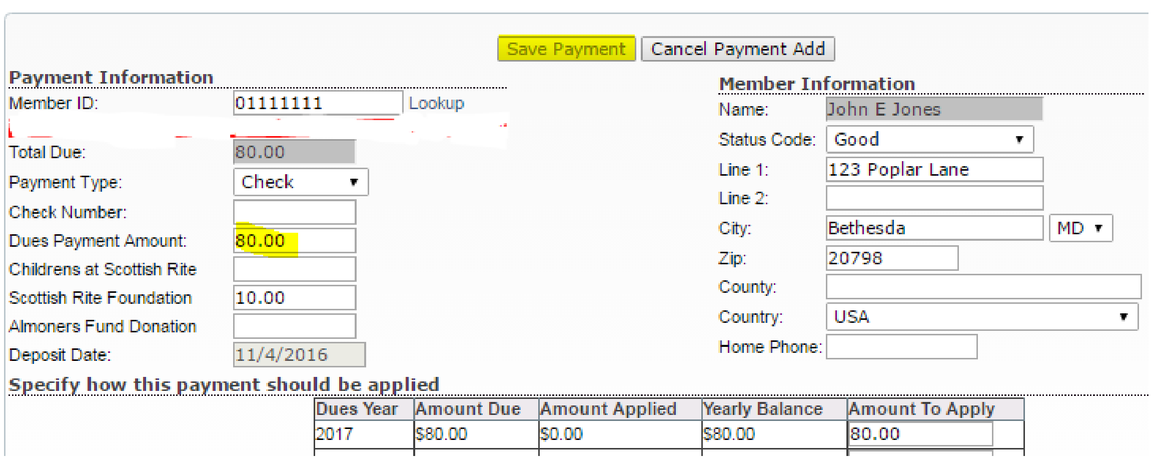
7. Next, the total balance due is displayed as the **Dues Payment Amount**. In this example, the balance is $80. If needed, you can edit this amount by deleting the displayed amount and typing in a different amount. For example, the member may be making an underpayment or an overpayment.

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.

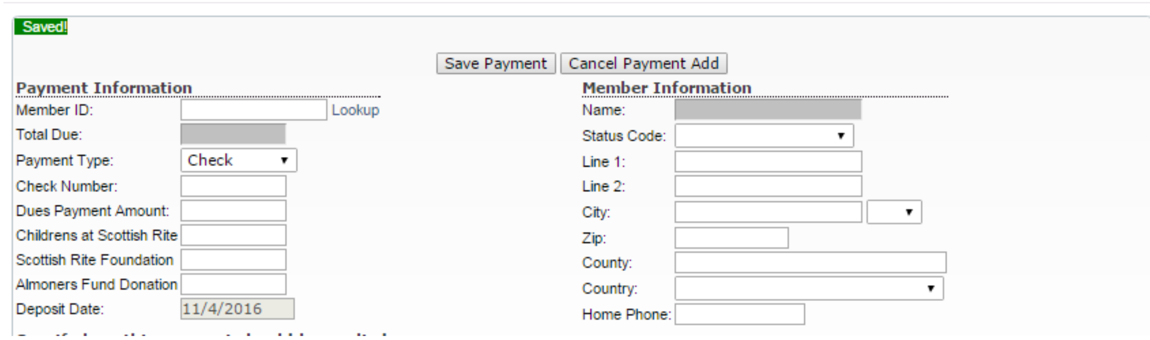
9. Update the member's address if necessary.

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



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.

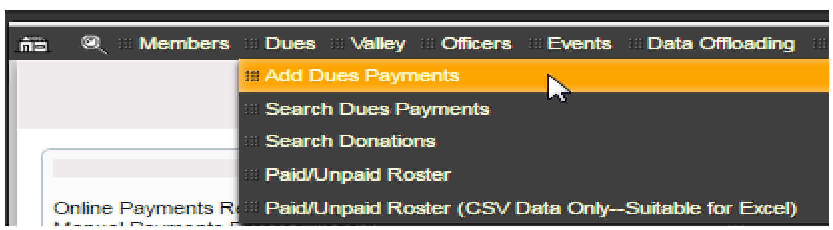


ADD PAYMENTS TO AN EXISTING DUES BATCH

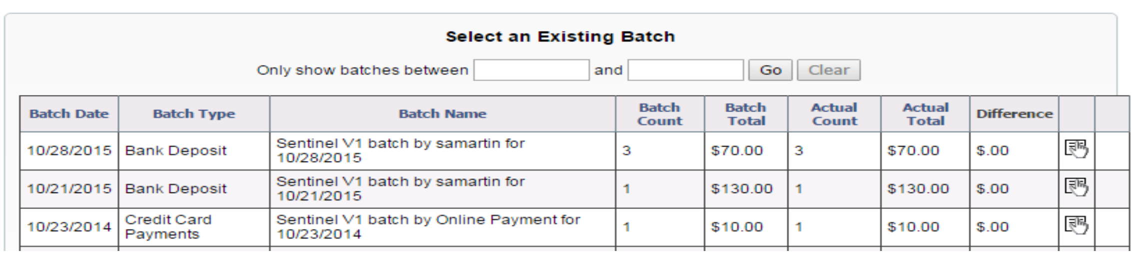
You can add dues payments to an existing batch at any time. For instance, if you create a batch in the morning and close the batch. You can reopen it later in the day and add additional payments.

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 [ ] and [ ] 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		
10/21/2015	Bank Deposit	Sentinel V1 batch by samartin for 10/21/2015	1	$130.00	1	$130.00	$.00		
10/23/2014	Credit Card Payments	Sentinel V1 batch by Online Payment for 10/23/2014	1	$10.00	1	$10.00	$.00		

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		
10/21/2015	Bank Deposit	Sentinel V1 batch by samartin for 10/21/2015	1	$130.00	1	$130.00	$.00		

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.

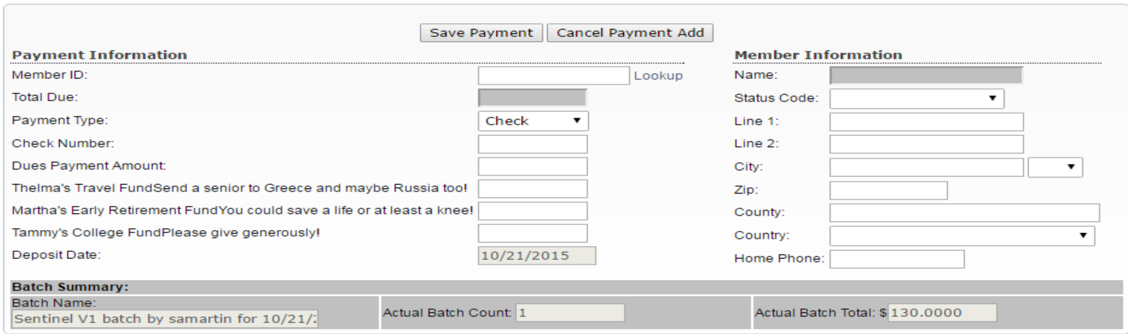
3. Click the Add Dues Payment to Batch button.

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 entered	

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.



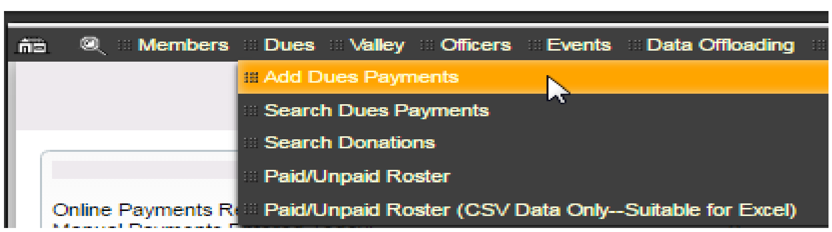
PROCESSING CREDIT CARD PAYMENTS

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 .

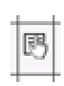
Follow these instructions to process credit card dues payments:

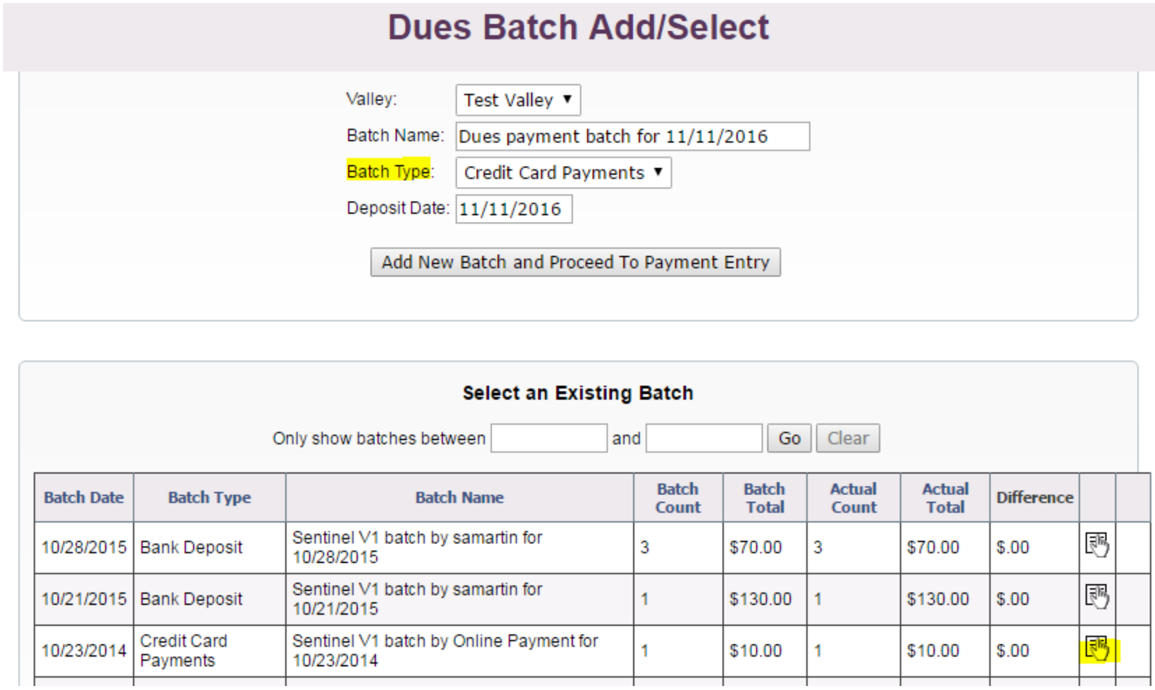
1. Click the **Add Dues Payment** option on the **Dues** tab on the SentinelV2 black menu bar.



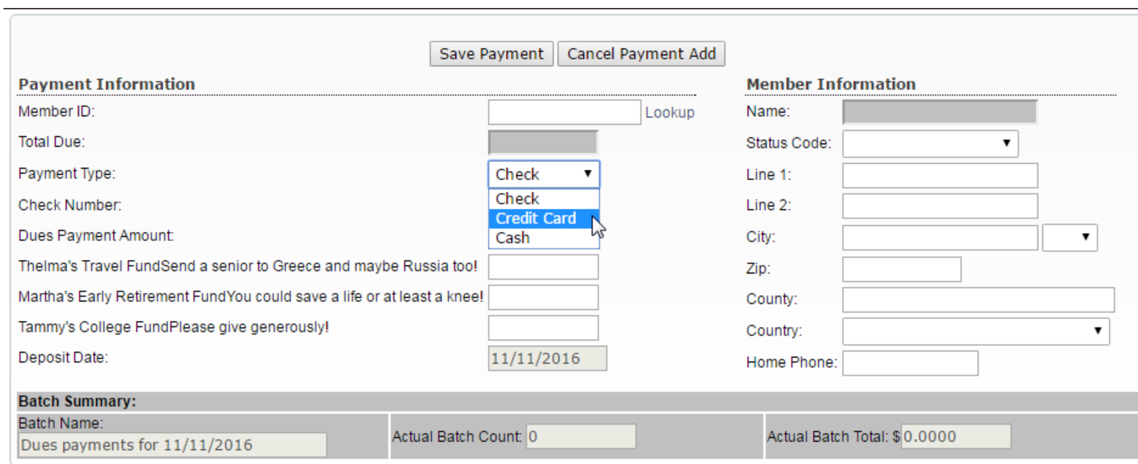
2. The Dues Batch Add/Select screen opens.

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

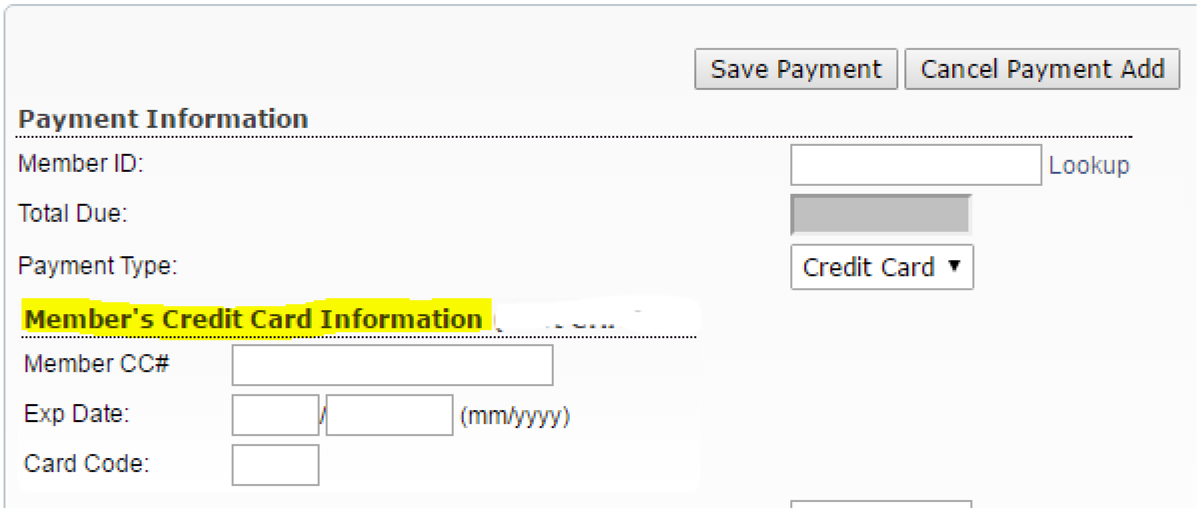
   If you want to **Select and Existing Batch,** click the hand  icon next to the **Credit Card Payments** batch that you want to open.



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.



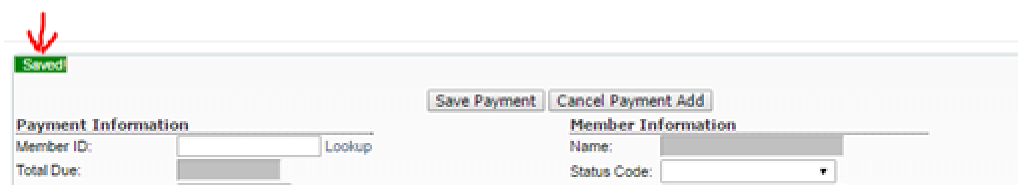
4. The screen will change to display the credit card information boxes. Enter the credit card information.



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.

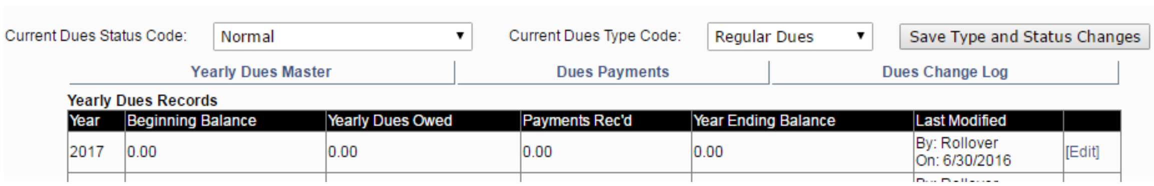


EDIT DUES PAYMENTS

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

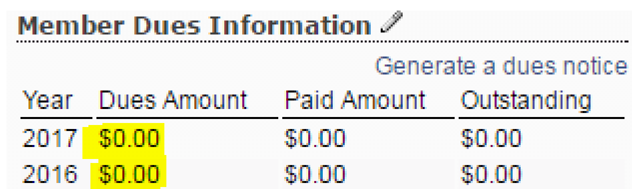
For this example we will use the record of a recently affiliated member. When a member first joins a Valley, his dues balance is set to zero. This applies to affiliated members, reinstated members (in some cases), and initiated members. A new member's record will look like the following:



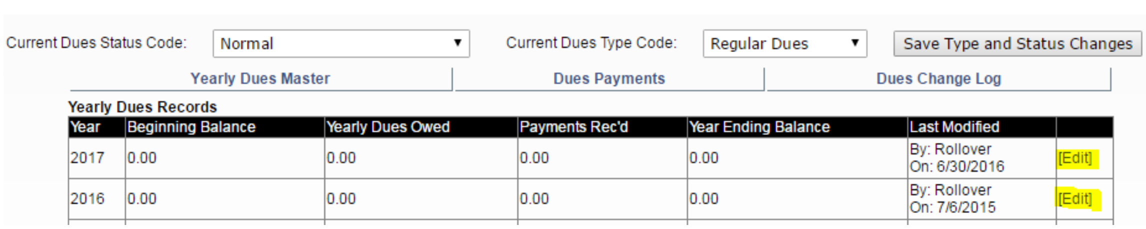
If the member has paid a certain amount or is going to be billed a certain amount, you will need to enter the **Beginning Balance** in his dues record. Follow these steps:

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

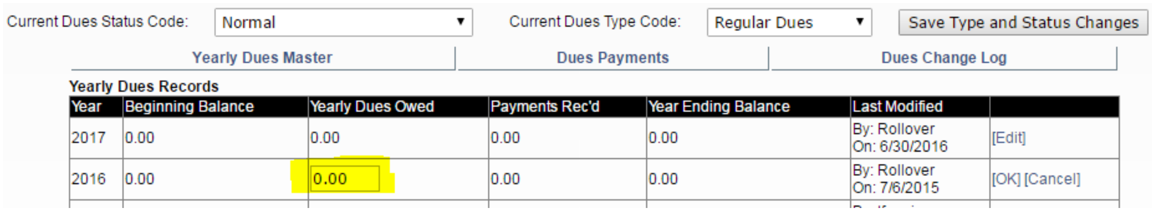
2. Locate the **Member Dues Information** section on his Profile screen. Your display should look similar to the following. The years you will see displayed are dependent on the individual member's payment history. Our sample member has been reinstated in 2016, but notice that he has no dues payment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



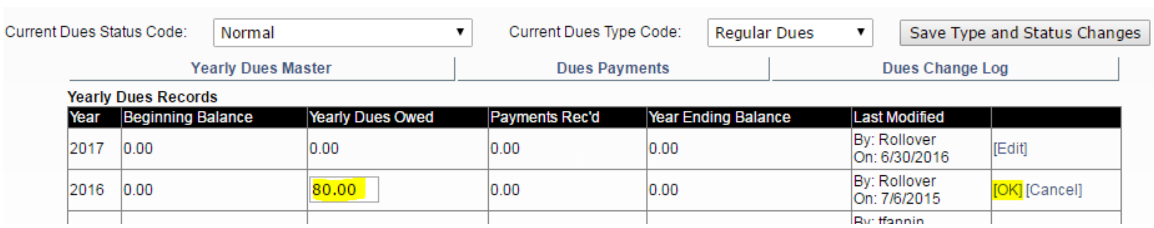
3. To change the **Dues Amount**, click the "pencil" icon next to Member Dues Information or hover your mouse pointer over the dues area and click anywhere in the darker gray area. The dues edit screen will open.
4.



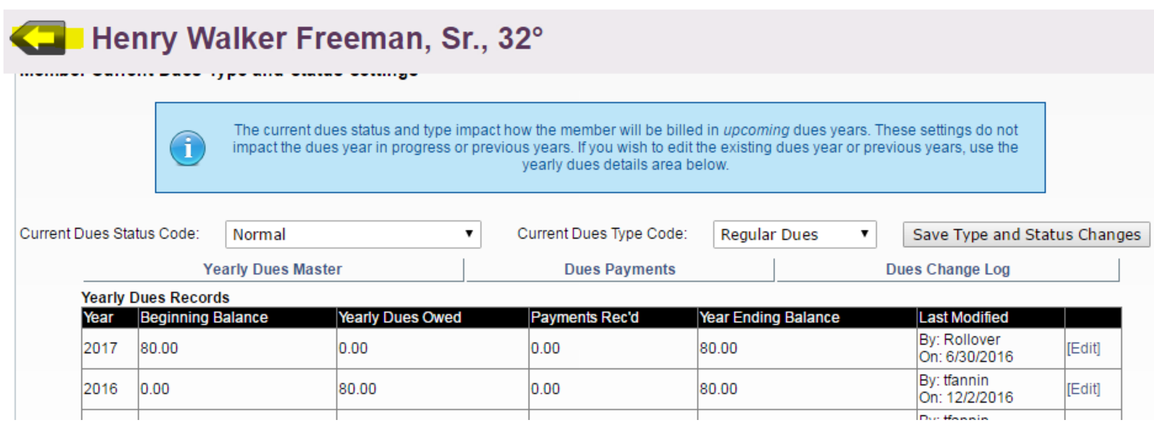
5. To enter a balance due for 2016 click the **Edit** button. A box will appear around the Yearly Dues Owed. Click in the box to replace 0.00 with the correct amount. For this example we will use 80.00.



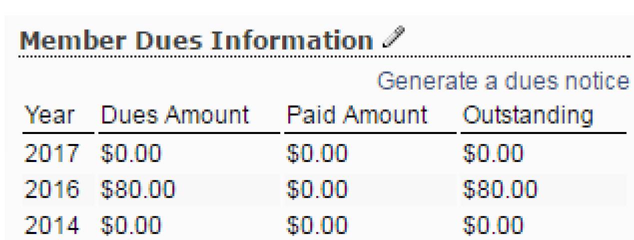
5. Here is the edited amount. Click the **OK** button to save your change.



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**.



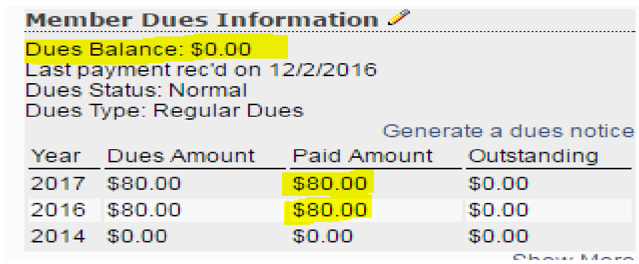
His Member Dues Information now shows him owing $80.00 for 2016. Follow the same instructions to edit his 2017 dues.



ADJUST A MEMBER'S DUES RECORD TO CORRECT AN OVERPAYMENT

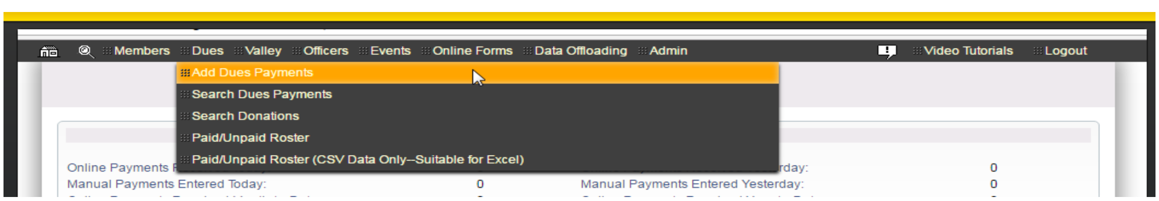
In SentinelV2, when you edit a previous payment amount, we call it an "**Adjustment.**" SentinelV1 users should note that the correction of an overpayment in this version of Sentinel is different from the way you handled it in version 1. SentinelV1 allowed the user to edit the **Paid Amount** by simply 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.

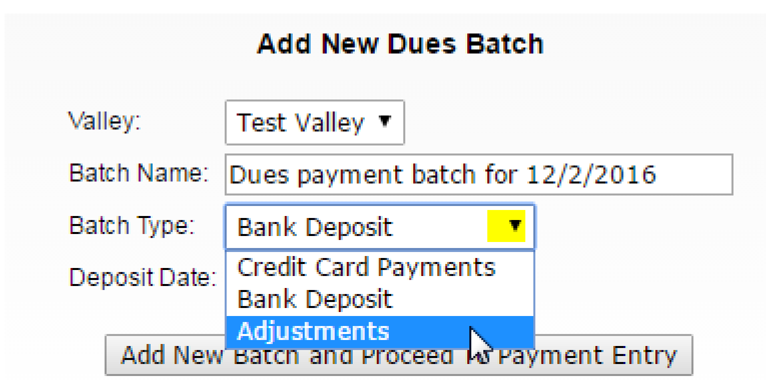


Here are the instructions for creating an "Adjustment" transaction to change his amount paid from $160.00 to $80.00.

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



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



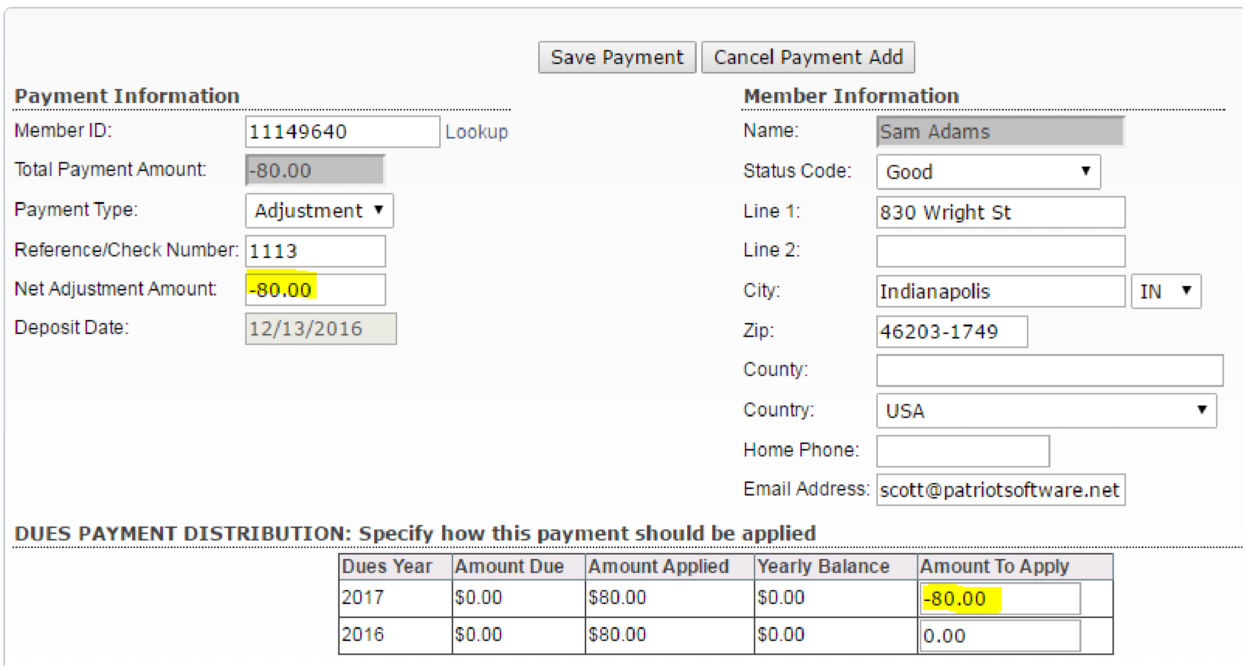
3. Click **Add New Batch and Proceed to Payment Entry**.

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.

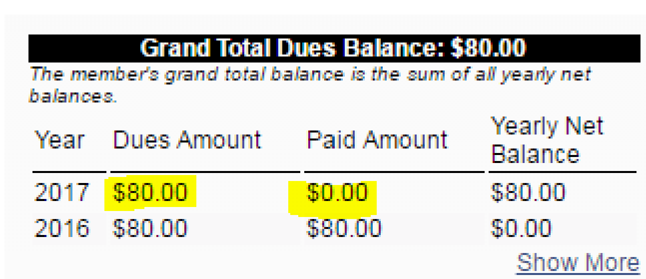
5. For this example, we are adjusting a payment made originally by "Check.," Add the check number of the original payment (optional but recommended).

   To reduce the incorrect payment amount from $160.00 to $80.00, type **-80.00** in the **Net Adjustment Amount**. This tells SentinelV2 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.



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.

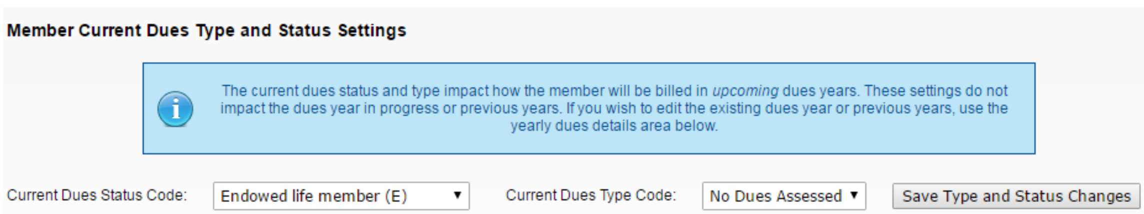


LIFE MEMBERSHIP MANAGEMENT

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

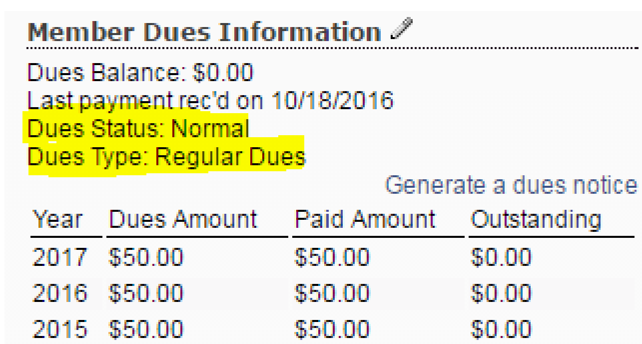
Valleys refer to paid Life Memberships in three ways: Life Member, Perpetual Member, or Endowed Member. SentinelV2 uses the "Endowed Member" term, and **the Current Dues Status Code** is set to **Endowed Life member (E),** and the **Current Dues Type Code** is set to **No Dues Assessed**.



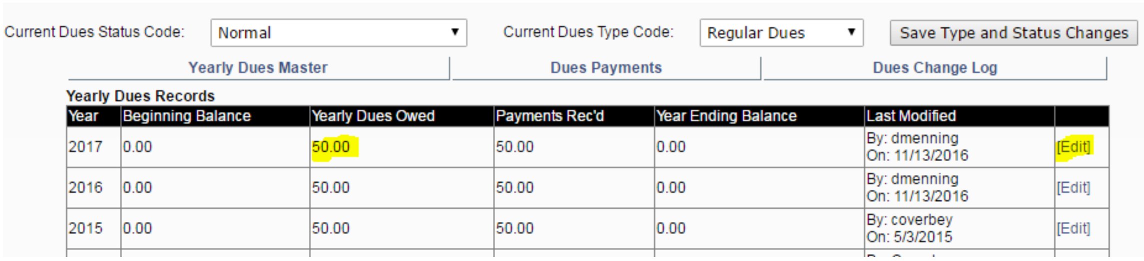
To change a member's dues record from dues paying to Endowed Life Member, follow these steps:

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.



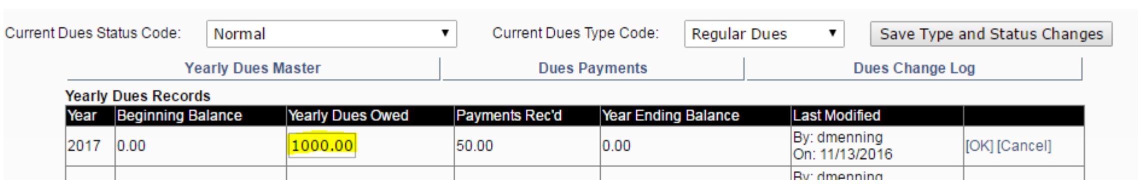
3. To change the member's **Dues Status**, **Dues Type**, and **Dues Amount**, click the "pencil" icon next to **Member Dues Information** or hover your mouse pointer over the dues area and click anywhere in the darker gray area. The dues edit screen will open.



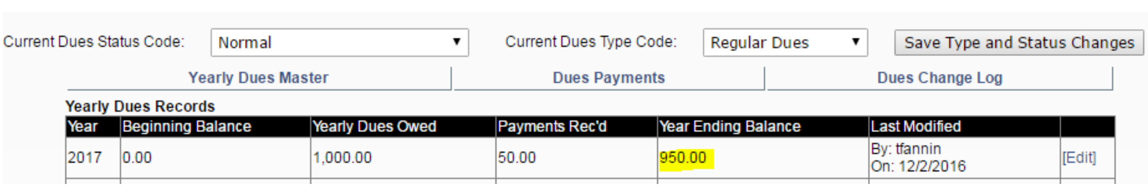
4. For this example, we are using a member who has paid his annual dues through 2017; however, he is now purchasing a Life Membership in the amount of $1,000. Therefore, you will need to edit his Yearly Dues Owed to accept the $1,000 payment.

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

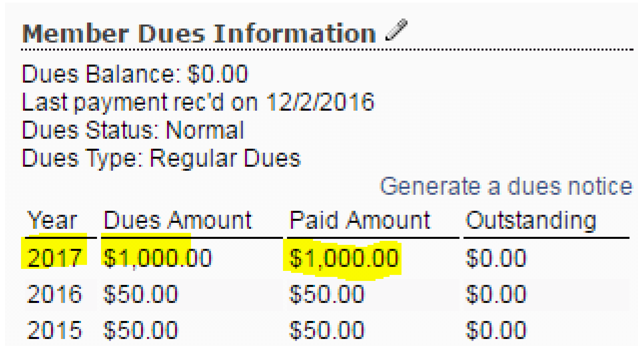
5. Click the **OK** button to save the change.



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.

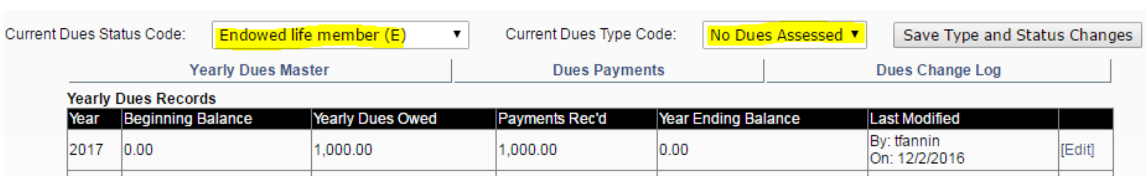


6. After adding the $950.00 payment, his **Member Dues Information** on his member **Profile** will look like the following:



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.



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

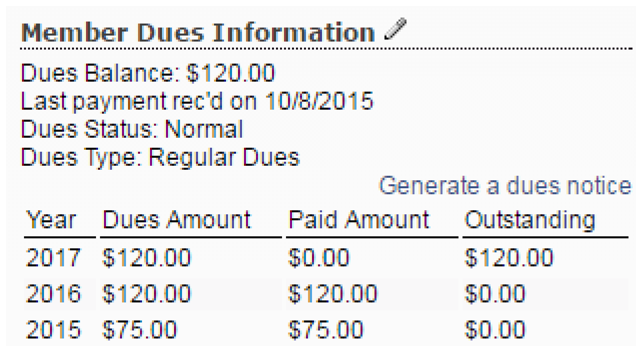
50-YEAR LIFE MEMBER MANAGEMENT

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.

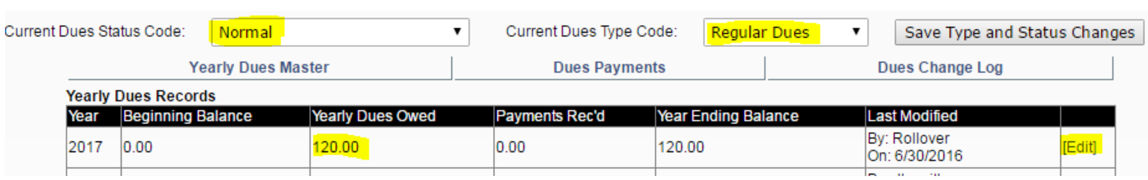
To change a member's dues record from dues paying to Endowed Life Member, follow these steps:

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.



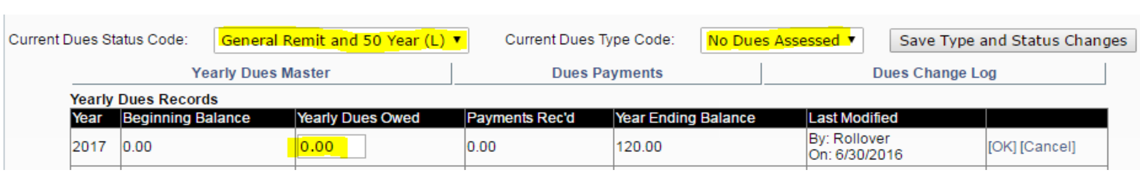
3. To change the member's **Dues Status**, **Dues Type**, and **Dues Amount**, click the "pencil" icon next to **Member Dues Information** or hover your mouse pointer over the dues area and click anywhere in the darker gray area. The dues edit screen will open.



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.

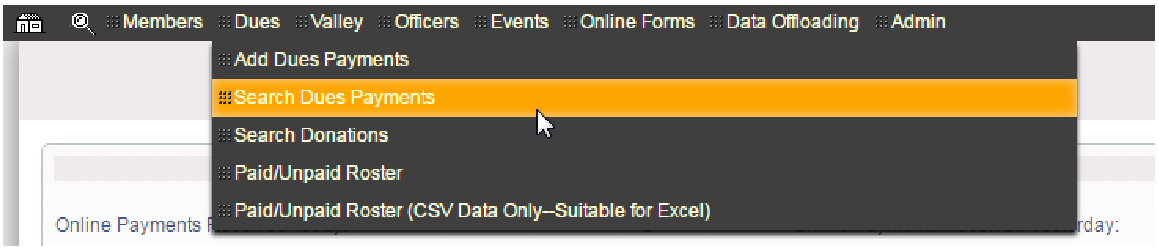
Your changes should look like the following.



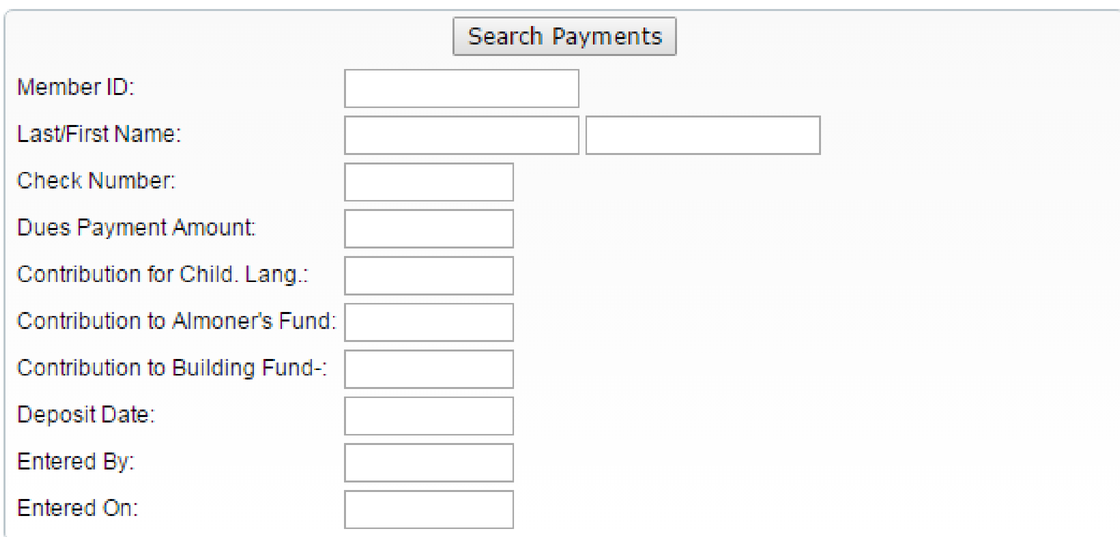
6. Click the **Save Type and Status Changes** button to save your changes.

SEARCH DUES PAYMENTS

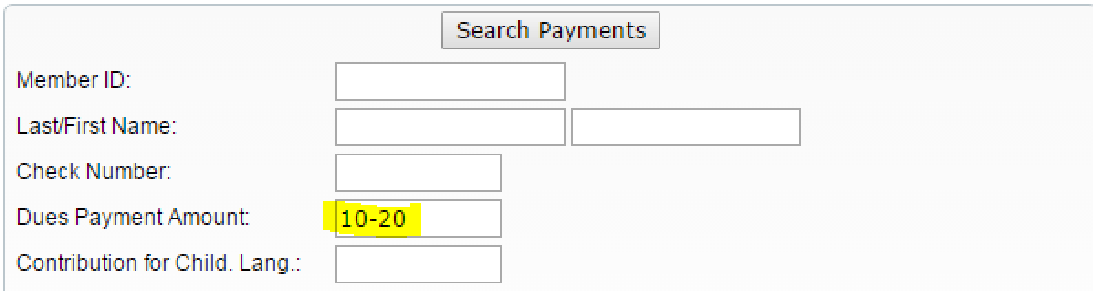
All payments entered can be searched and displayed on the screen and displayed as reports. The **Search Dues Payments** feature is located on the **Dues** menu.



1. 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**.

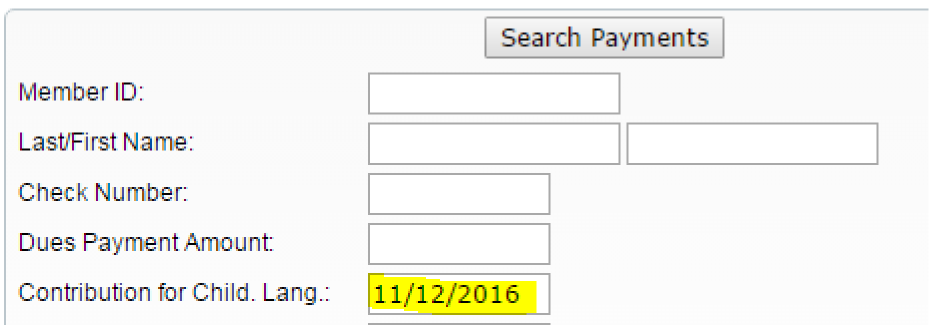


2. You can search for a single **Dues Payment Amount** or a range by adding the dollar amount or range amount in the **Dues Payment Amount** box like this:

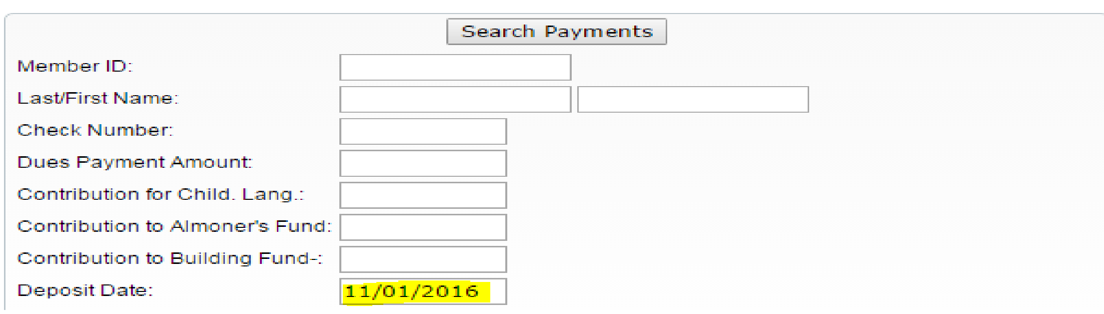


3. You can search for donations for the three funds displayed on a dues notice. This box is a date search. You can enter a single date or a date range (Date Range Example: 01/01/2016-12/31/2016.

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



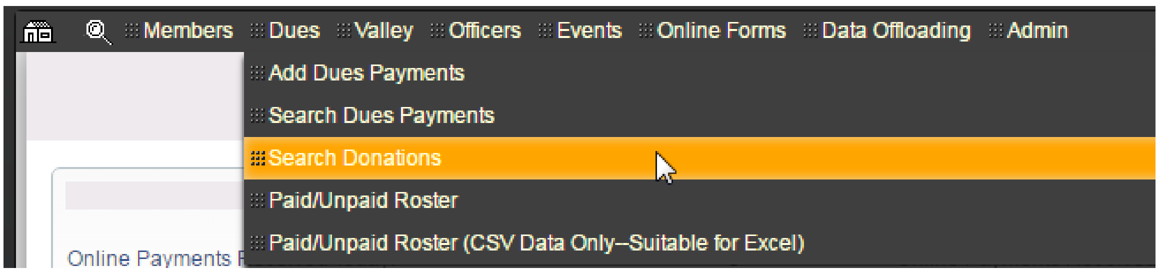
4. You can search by Deposit date for a single date or a date range (Date Range Example: 01/01/2016-12/31/2016).



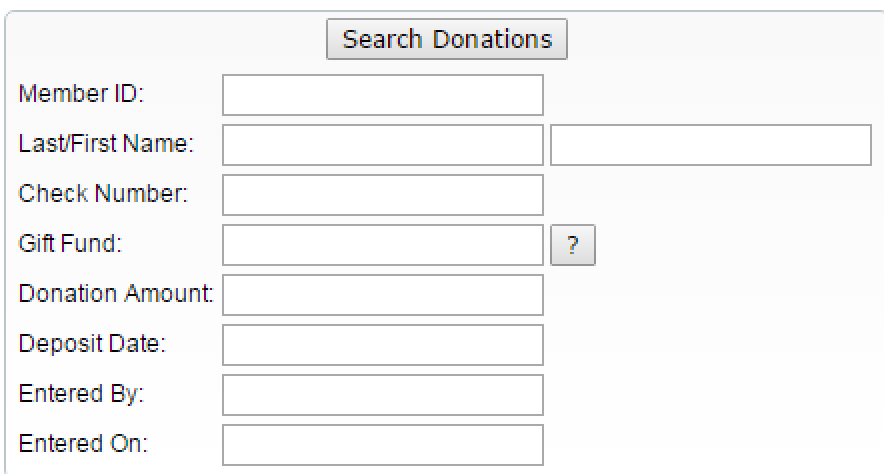
5. You can search by Entered By, Entered On, and you can use multiple search boxes as in the following search that looks for all entries by user "tsmith" made on "11/01/2016."

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.

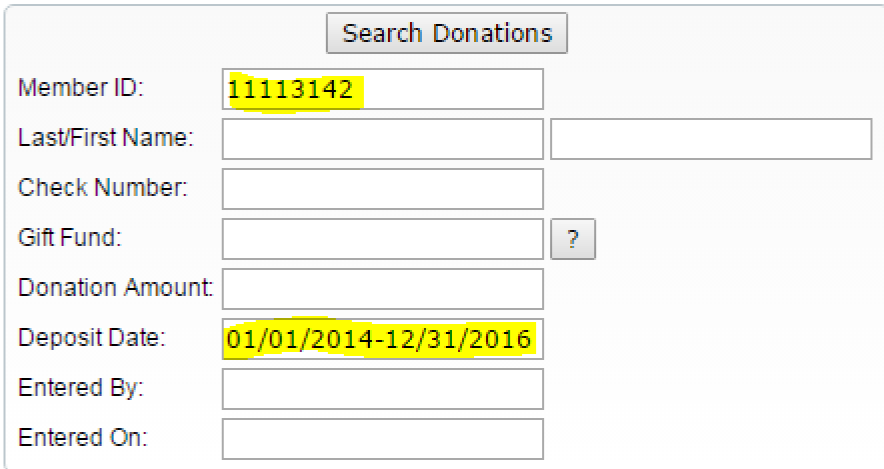


1. Click **Search Donations** to open the search screen.

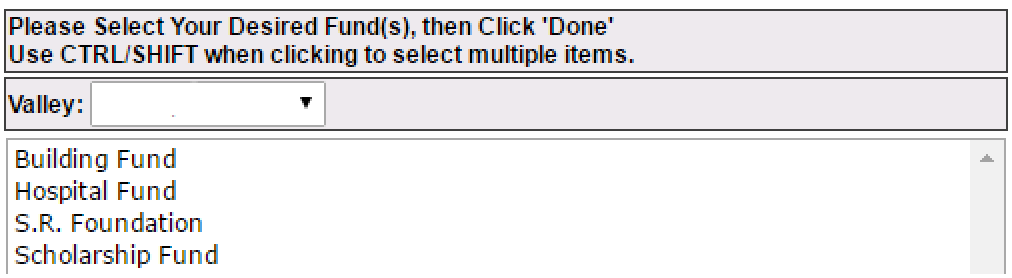


2. You search by entering search criteria in the boxes. For example, search for all donations made by a single member by entering his **Member ID** and click **Search Donations** or you can enter his **Last/First Name** and **click Search Donations**.

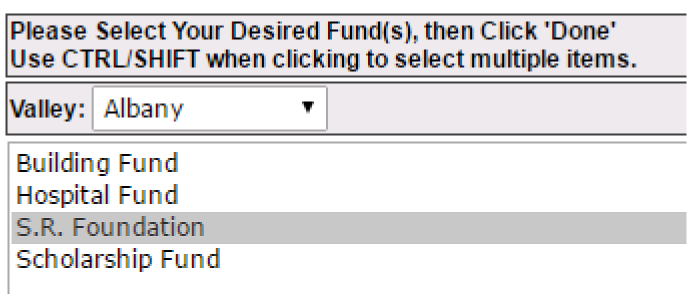
3. You can search on multiple fields. For example, you can find all donations made by a member during a defined period by entering his **Member ID** or name combined with a date range in the **Deposit Date** field. Your search would look like the following:



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).

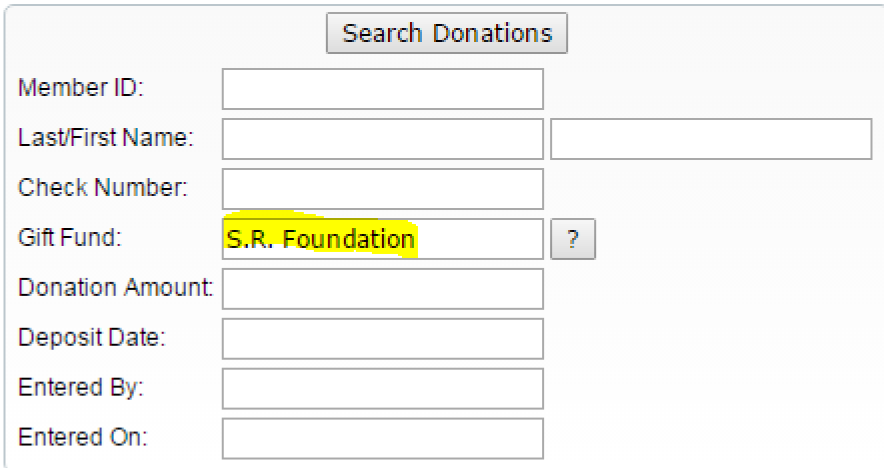


5. Highlight the **Gift Fund** that you want to search on. Tip! You can search on multiple funds by holding down the Ctrl key on your keyboard while you select multiple Gift Funds.



6. Click the **Done** 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.



PAID/UNPAID ROSTER

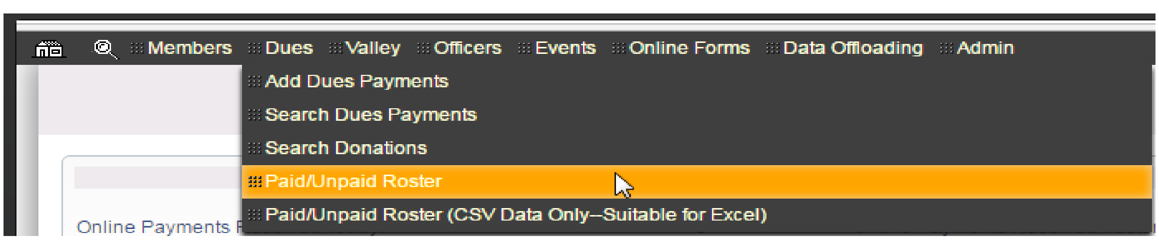
The **Paid/Unpaid Roster** is a predefined report of the current dues status for every member in your Valley. This roster is a point-in-time report—That is, it displays the dues status of the members at the time you view the report.

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.



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

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

Valley of Charlotte / Orient of North Carolina
Deceased Life Member Roster (Perpetual)

Page 1 of 62

MEMBER NAME	MEMBER NUMBER	S C	D C	------- CONTRIBUTIONS ------- BOX 1	BOX 2	BOX 3	-------- AMOUNT DUE HISTORY -------- PAST DUE	CURRENT	TOTAL	-------- PAYMENT HISTORY -------- 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 NAME	MEMBER NUMBER	S C	D C	------- CONTRIBUTIONS ------- BOX 1	BOX 2	BOX 3	-------- AMOUNT DUE HISTORY -------- PAST DUE	CURRENT	TOTAL	-------- PAYMENT HISTORY -------- 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.

12/02/2016
Page 35 of 62

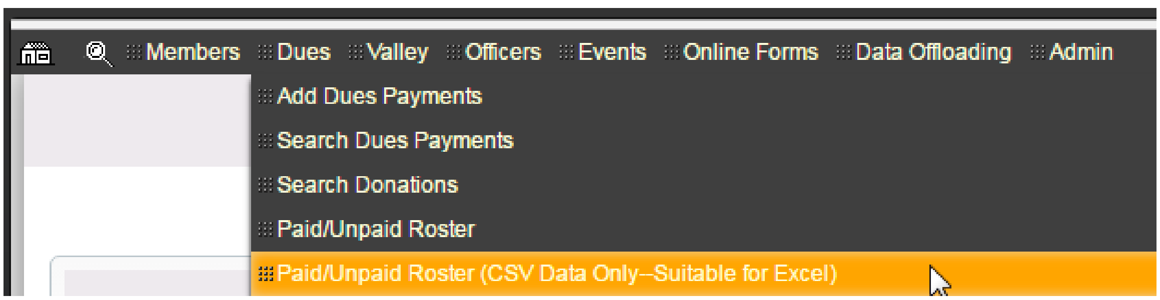
Valley of Charlotte / Orient of North Carolina
Unpaid Roster

MEMBER NAME	MEMBER NUMBER	S C	D C	------- CONTRIBUTIONS ------- BOX 1	BOX 2	BOX 3	--------- AMOUNT DUE HISTORY --------- PAST DUE	CURRENT	TOTAL	--------- PAYMENT HISTORY --------- 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).



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

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	PersonID	Prefix	FirstName	PrefFirstN	MiddleNa	LastName	LineageLa	FullName	Suffix	Statemen	DuesCode	LastPayDate	LastDuesB	Year2Amc	Year1Amc	CurrentAr	PaidYTD	LastPayAr	Box1Amo	Box2Ar
2	154500		Peter	Peter		Arkwright		Peter Arkwright		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 Bolick		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 Brown		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	

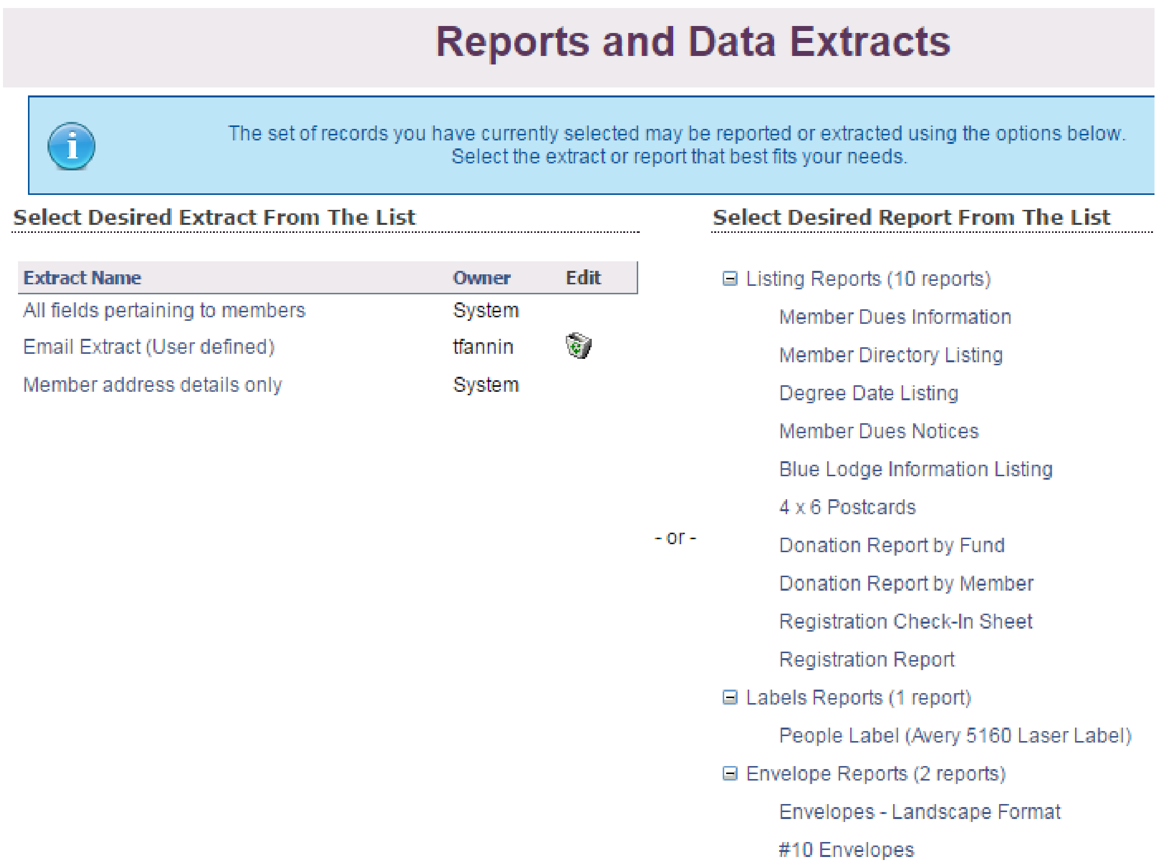
CHAPTER 6: REPORTS AND DATA EXTRACTS

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.

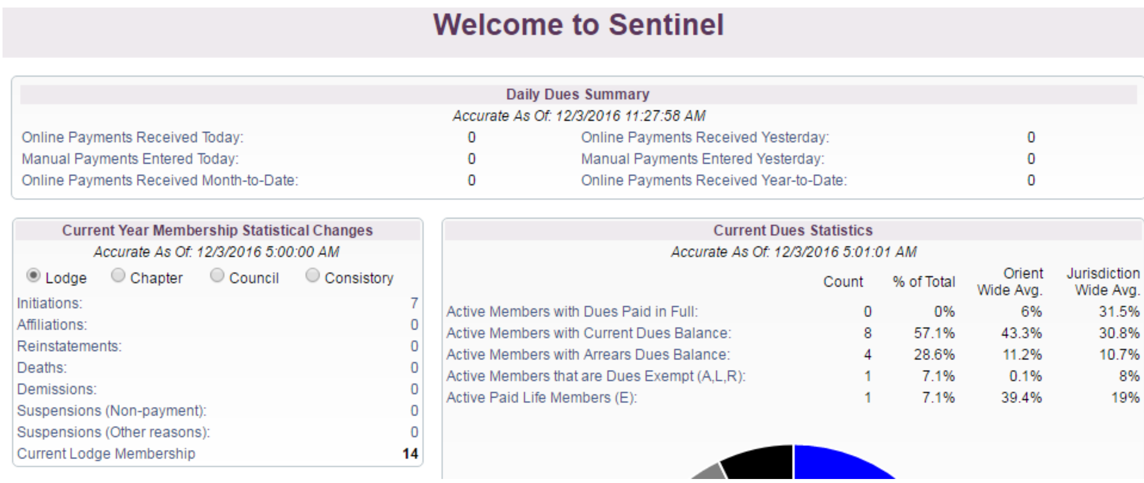


PREDEFINED REPORTS

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.



Welcome to Sentinel

Daily Dues Summary

Accurate As Of: 12/3/2016 11:27:58 AM

Online Payments Received Today:	0	Online Payments Received Yesterday:	0
Manual Payments Entered Today:	0	Manual Payments Entered Yesterday:	0
Online Payments Received Month-to-Date:	0	Online Payments Received Year-to-Date:	0

Current Year Membership Statistical Changes

Accurate As Of: 12/3/2016 5:00:00 AM

◉ Lodge ○ Chapter ○ Council ○ Consistory

Initiations:	7
Affiliations:	0
Reinstatements:	0
Deaths:	0
Demissions:	0
Suspensions (Non-payment):	0
Suspensions (Other reasons):	0
Current Lodge Membership	**14**

Current Dues Statistics

Accurate As Of: 12/3/2016 5:01:01 AM

	Count	% of Total	Orient Wide Avg.	Jurisdiction Wide Avg.
Active Members with Dues Paid in Full:	0	0%	6%	31.5%
Active Members with Current Dues Balance:	8	57.1%	43.3%	30.8%
Active Members with Arrears Dues Balance:	4	28.6%	11.2%	10.7%
Active Members that are Dues Exempt (A,L,R):	1	7.1%	0.1%	8%
Active Paid Life Members (E):	1	7.1%	39.4%	19%

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.

Current Year Membership Statistical Changes

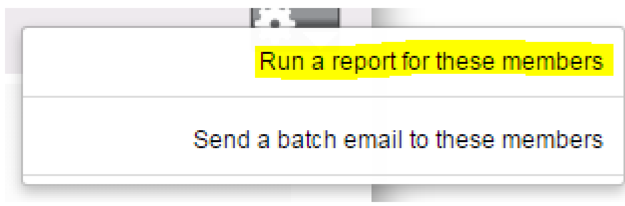
Accurate As Of: 12/3/2016 5:00:00 AM

◉ Lodge ○ Chapter ○ Council ○ Consistory

Initiations:	7
Affiliations:	0
Reinstatements:	0
Deaths:	0
Demissions:	0
Suspensions (Non-payment):	0
Suspensions (Other reasons):	0
Current Lodge Membership	**14**

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

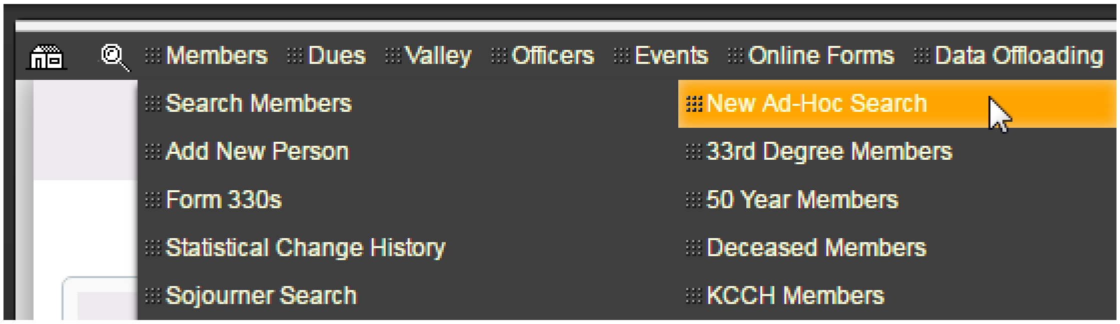
3. Click **Run a report for these members.** Notice also that you can send a batch email to these members by clicking that link.



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

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.



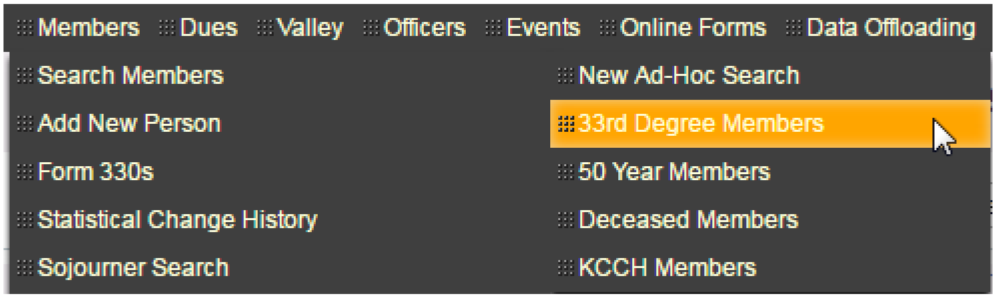
MEMBER AD-HOC SEARCH REPORTS

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.

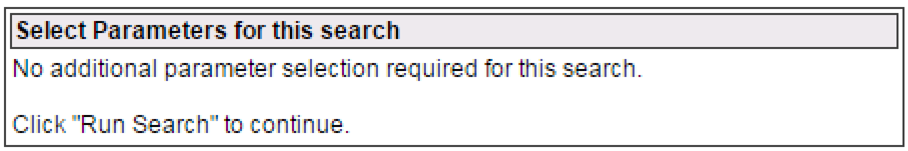
The important point to remember is that reports are created using the gear icon in the upper corner of search results screen. The following is a list of predefined reports available for Member Ad-Hoc Search Results. We will not define each of these reports, as most of them are self-explanatory.

33RD DEGREE MEMBER REPORT

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



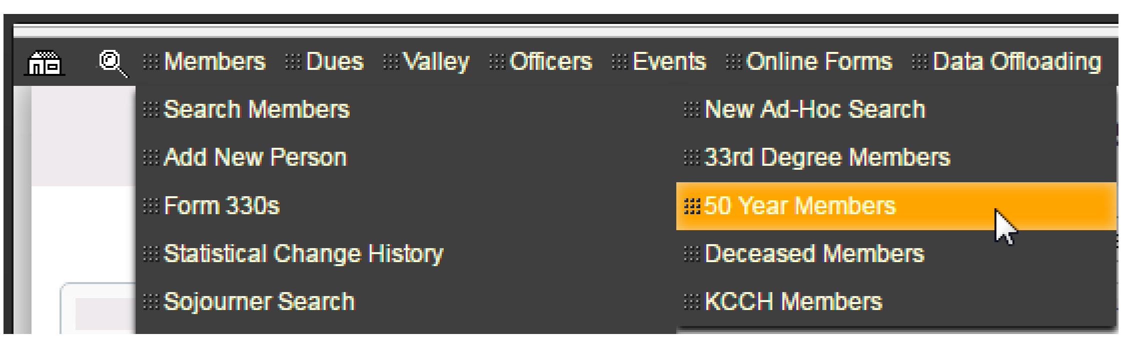
2. Click on **Run Search** to display the results.



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. To complete your report, see steps 2 – 4 in the preceding section.

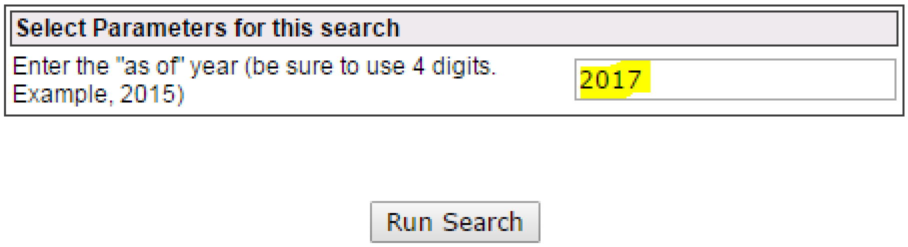
50-YEAR MEMBERS REPORT

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

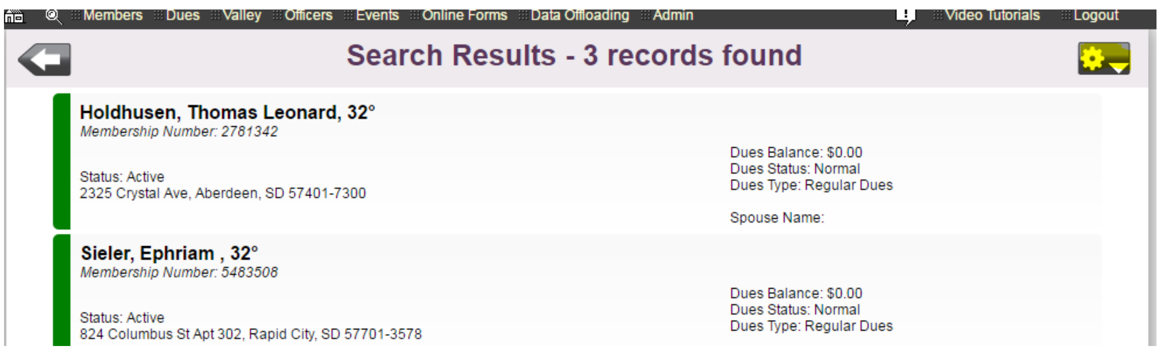


1. Click on 50 Year Members.

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.



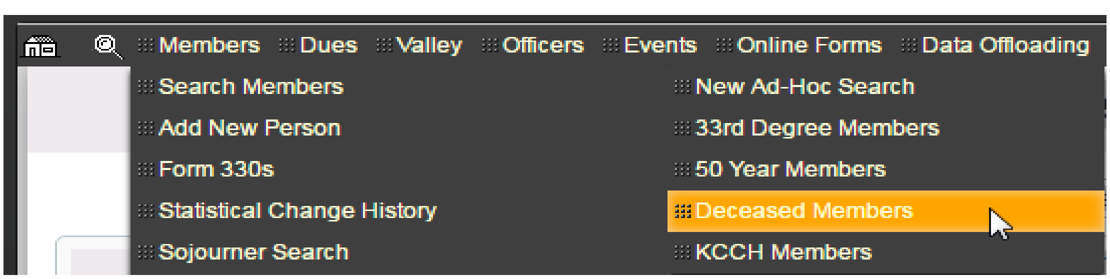
3. Click **Run Search** to display the results.



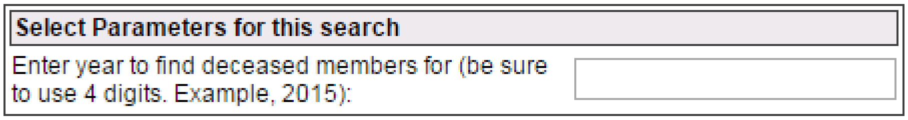
4. To create a report, click the gear  in the upper right corner. No matter how you run a search, the steps for creating a report are virtually always the same—that is, you click the gear in the upper right corner. To complete your report, see steps 2 – 4.

DECEASED MEMBERS REPORT

The Deceased Members Report is located on the Members Tab.

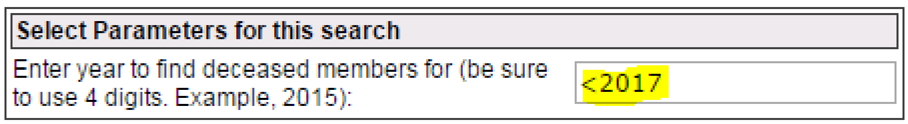


1. Click **Deceased Members** to open the search screen.

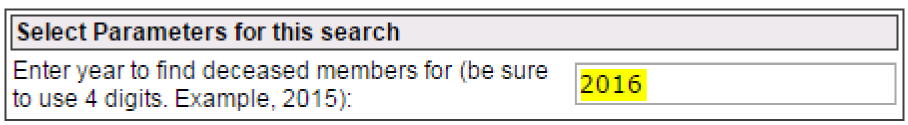


2. There are multiple search criteria that you can enter to create a report of deceased members.

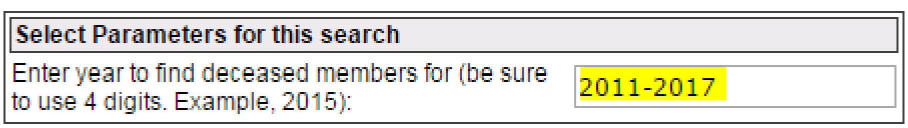
   - To find a complete list of all deceased members, enter the date of the next year. For example, if the current year is 2016, enter **<2017** (all dates less than 2017) in the search box.



   - 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.

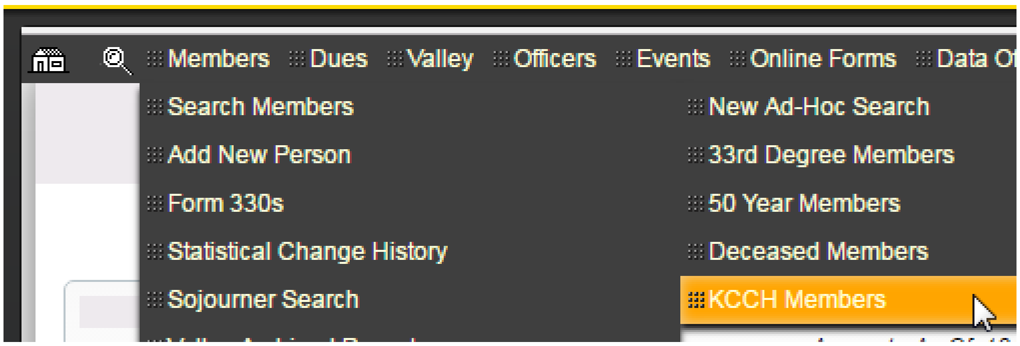


3. Click **Run Search** to display the results of the search.

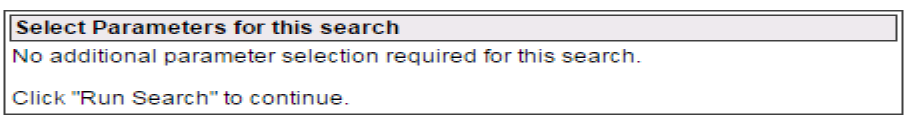
5. To create a report, click the gear  in the upper right corner. No matter how you run a search, the steps for creating a report are virtually always the same—that is, you click the gear in the upper right corner.

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.

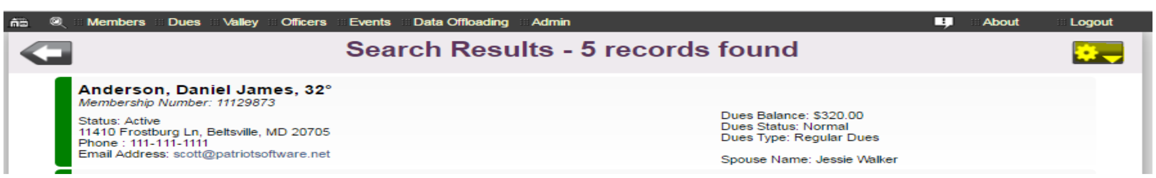
Data Extract Reports are located in several areas in SentinelV2. You will find them on the Welcome to Sentinel Screen (see also Chapter 1), the Members tab under Search Members (see also Chapter 3), and as reporting options for any search that you perform in SentinelV2 (see also Chapter 3).

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

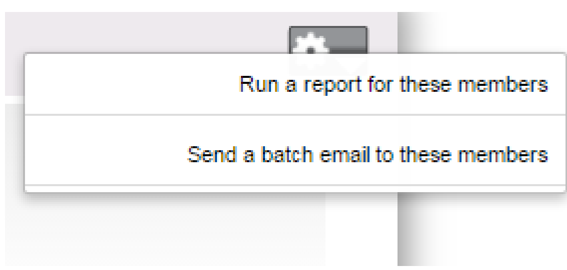
Follow these instructions to perform a **Data Extract:**

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.

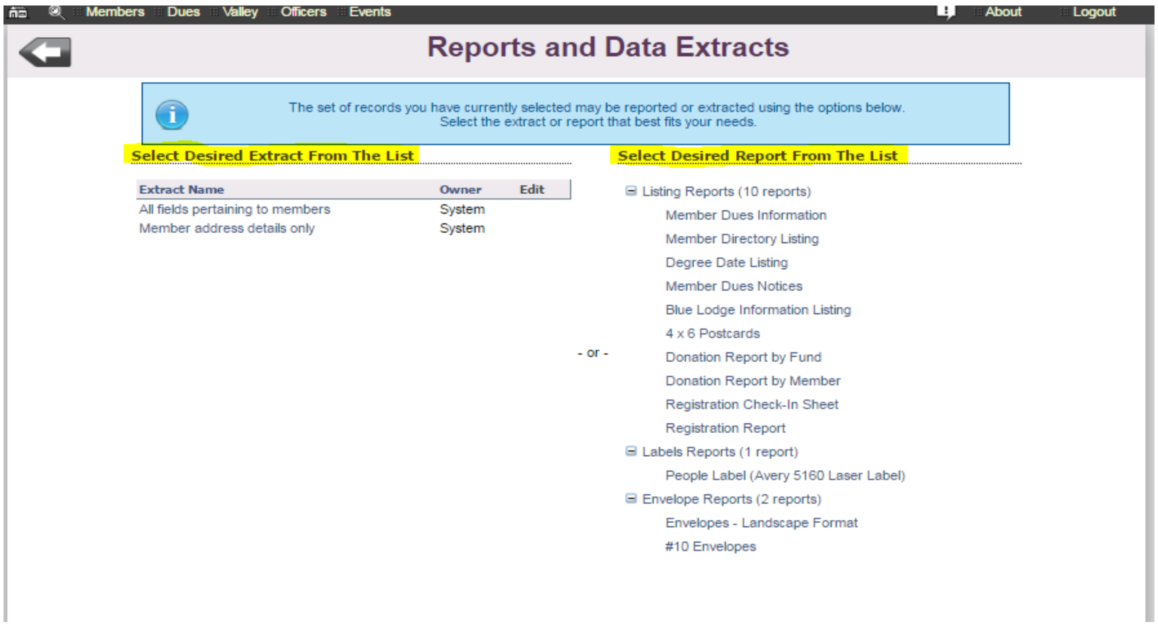
2. On the **Search Results** screen of any search, click the gear in the upper right corner of the Sentinel screen.



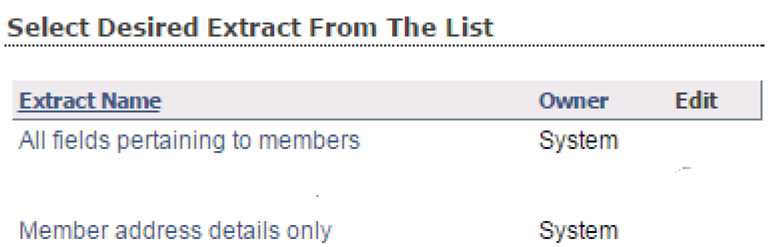
3. Click the option to **Run a report for these members**.



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



The 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.



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	
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 >>

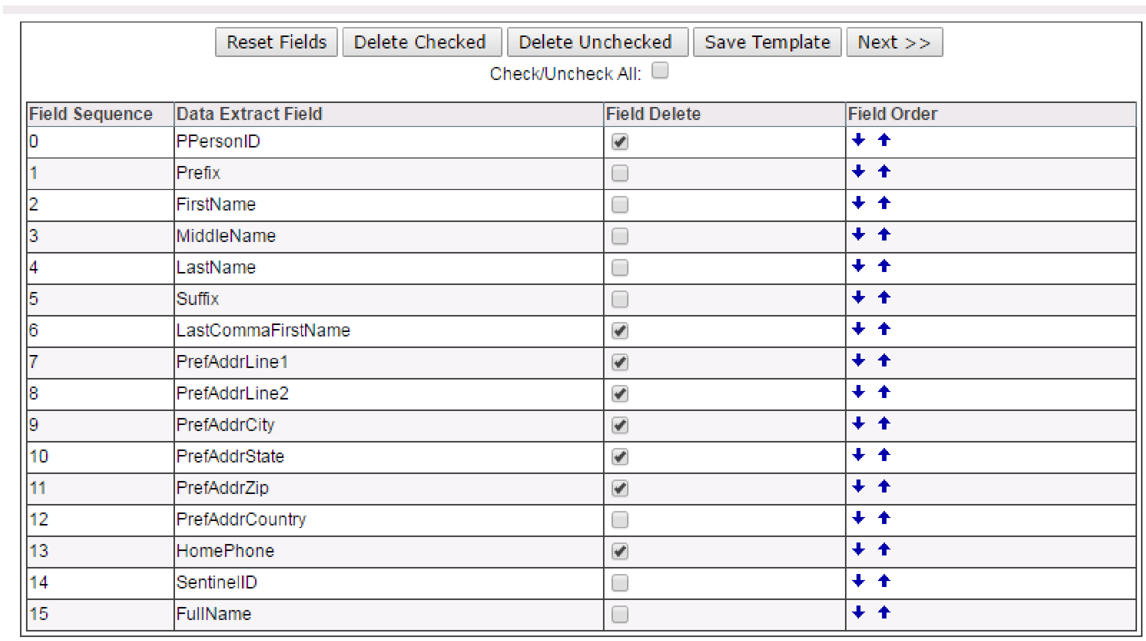
Check/Uncheck All: ☐

Field Sequence	Data Extract Field	Field Delete	Field Order
0	PPersonID	☐	↓ ↑
1	Prefix	☐	↓ ↑
2	FirstName	☐	↓ ↑
3	MiddleName	☐	↓ ↑
4	LastName	☐	↓ ↑
5	Suffix	☐	↓ ↑
6	LastCommaFirstName	☐	↓ ↑
7	PrefAddrLine1	☐	↓ ↑
8	PrefAddrLine2	☐	↓ ↑
9	PrefAddrCity	☐	↓ ↑
10	PrefAddrState	☐	↓ ↑
11	PrefAddrZip	☐	↓ ↑
12	PrefAddrCountry	☐	↓ ↑
13	HomePhone	☐	↓ ↑
14	SentinelID	☐	↓ ↑
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.

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

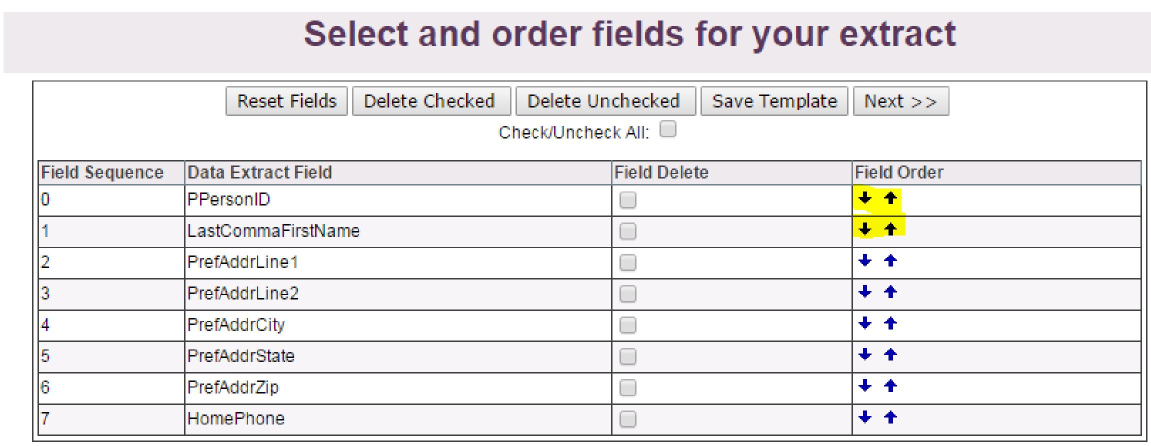


Reset Fields | Delete Checked | Delete Unchecked | Save Template | Next >>

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	☑	↓ ↑
7	PrefAddrLine1	☑	↓ ↑
8	PrefAddrLine2	☑	↓ ↑
9	PrefAddrCity	☑	↓ ↑
10	PrefAddrState	☑	↓ ↑
11	PrefAddrZip	☑	↓ ↑
12	PrefAddrCountry	☐	↓ ↑
13	HomePhone	☑	↓ ↑
14	SentinelID	☐	↓ ↑
15	FullName	☐	↓ ↑

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 order 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	☐	↓ ↑
1	LastCommaFirstName	☐	↓ ↑
2	PrefAddrLine1	☐	↓ ↑
3	PrefAddrLine2	☐	↓ ↑
4	PrefAddrCity	☐	↓ ↑
5	PrefAddrState	☐	↓ ↑
6	PrefAddrZip	☐	↓ ↑
7	HomePhone	☐	↓ ↑

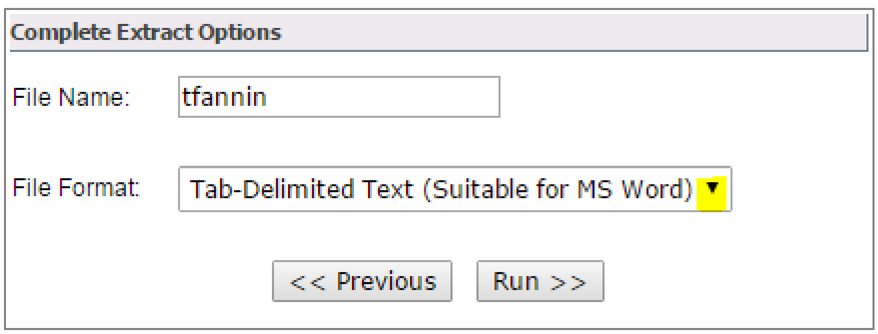
Notice the up-and-down arrows in the Field Order Column. Use these arrows to determine how you want your columns to display in your spreadsheet. For example, if you want the phone number to follow the member's name, click the upward arrow on the phone number row. The **Home Phone** will move up the list.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

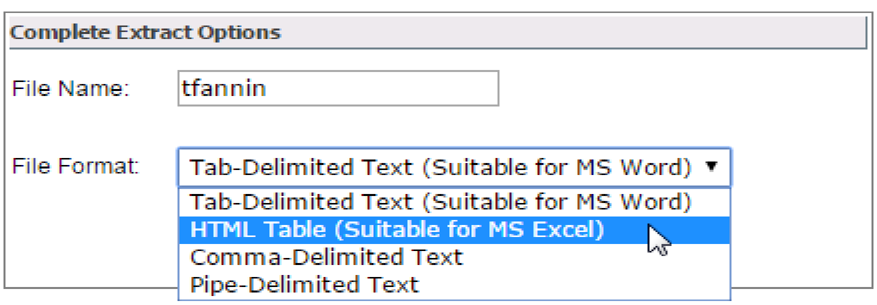
Field Sequence	Data Extract Field	Field Delete	Field Order
0	PPersonID		
1	LastCommaFirstName		
2	HomePhone		
3	PrefAddrLine1		
4	PrefAddrLine2		
5	PrefAddrCity		
6	PrefAddrState		
7	PrefAddrZip		

10. 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.

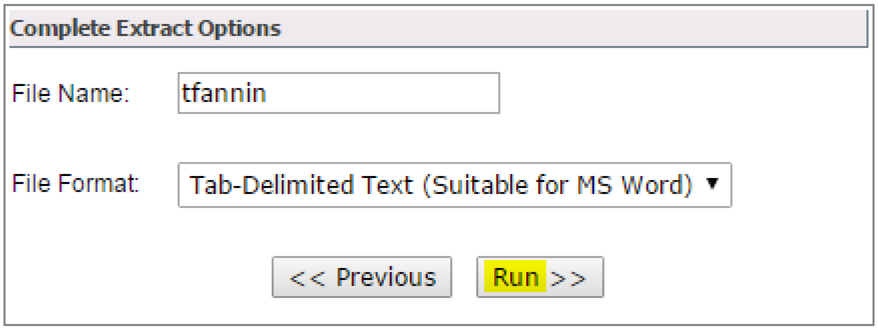
11. SentinelV2 will ask how you want to output your report.



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).

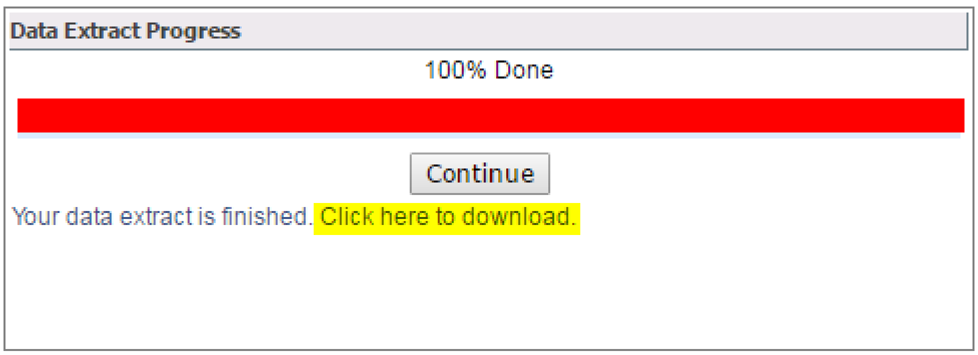


13. Click the **Run** button to create the spreadsheet.



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.

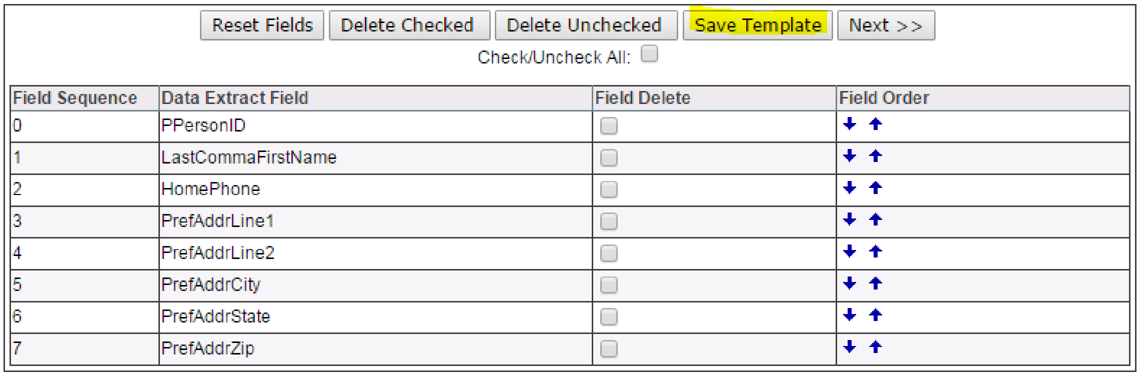


SAVING A DATA EXTRACT TEMPLATE FOR FUTURE USE

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:

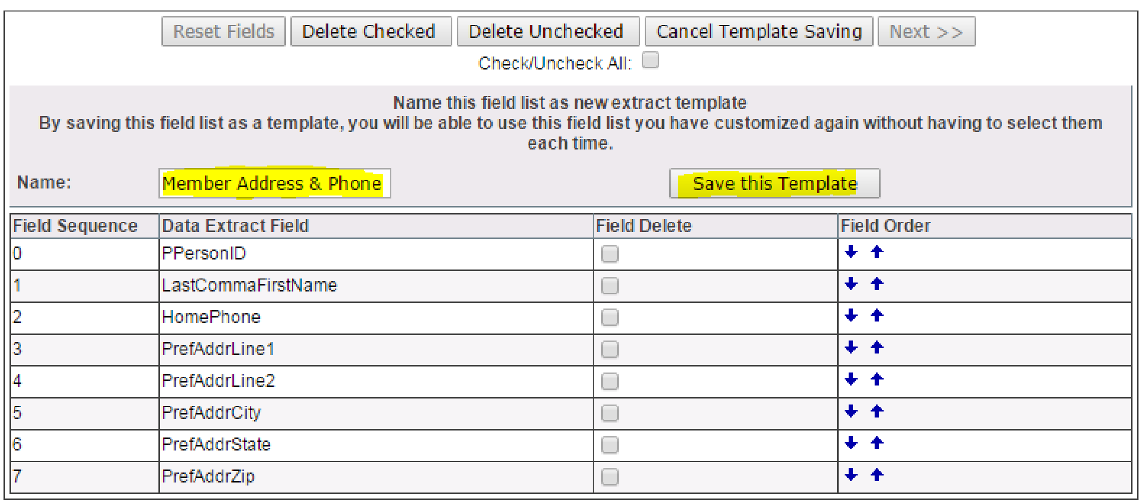
Field Sequence	Data Extract Field	Field Delete	Field Order
0	PPersonID		
1	LastCommaFirstName		
2	HomePhone		
3	PrefAddrLine1		
4	PrefAddrLine2		
5	PrefAddrCity		
6	PrefAddrState		
7	PrefAddrZip		

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 Unchecked | Cancel Template Saving | Next >>

Check/Uncheck All:

Name this field list as new extract template

By saving this field list as a template, you will be able to use this field list you have customized again without having to select them each time.

Name: Member Address & Phone | Save this Template

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	
Member address details only	System	