

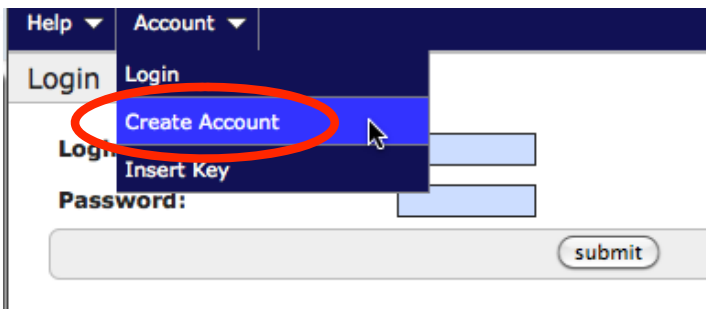
This document assume no one has setup Mori for your lodge. At a minimum, follow these steps before you begin to edit any member records.

## CREATE AN ACCOUNT

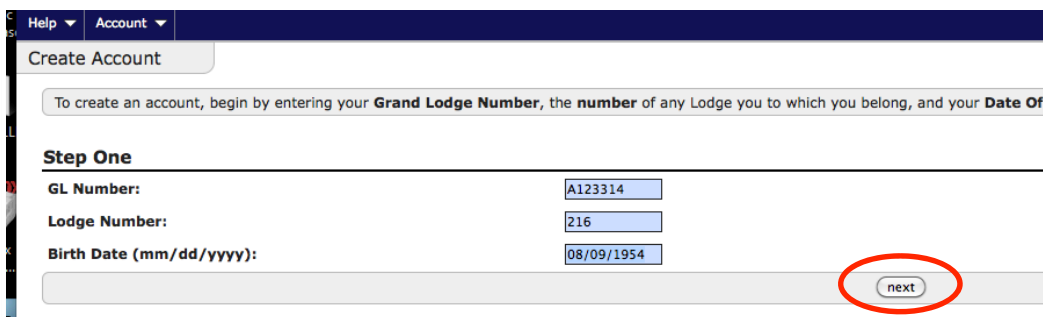
In order to create an account in Mori, you will need your GL Number. This number will start with M followed by 6 numbers. M123123 would be a valid number. 0MI 023 123 is not. The old system had an ID numbers and came from the our old membership system. GL Numbers are completely different. If you don't know your new GL Number, please call or email the Grand Lodge and we'll give it to you.

Note: Beginning with the 2012 membership cards, the new GL Number will be printed on the card.

1. To create an account you will need the following:
  - a. Your GL Number.
  - b. Your date of birth in the format of mm/dd/yyyy.
  - c. Your lodge number.
  - d. A valid email address saved on your record.
2. Go Here: <http://Secretary.GrandLodgeMI.org> which will direct you to <http://mi.moriapp.com/mori/>
3. Click on 'Account' 'Create Account'.



4. Fill in the form.

A screenshot of the 'Create Account' form. The form is titled 'Create Account' and includes a sub-header 'Step One'. It contains three input fields: 'GL Number' with the value 'A123314', 'Lodge Number' with the value '216', and 'Birth Date (mm/dd/yyyy)' with the value '08/09/1954'. A 'next' button is located at the bottom right of the form and is circled in red. Above the form, there is a message: 'To create an account, begin by entering your Grand Lodge Number, the number of any Lodge you to which you belong, and your Date Of B'.

- a. Click 'next'
- b. Verify this is you, and then create an 8digit/number password. Case sensitive.

i. This is separate from the 'Key' you will receive from Grand Lodge.

The screenshot shows the 'Create Account' form. At the top, there are 'Help' and 'Account' dropdown menus. Below them is a 'Create Account' button. A message box says: 'Confirm that the displayed address is correct. If it is not, please contact the Registry department to correct it before proceeding. Please enter a desired one letter and one number.' The 'Confirm Address' section shows '123 Any Street' and 'Any City, Freedomia 00000-0000', both circled in red with an arrow pointing to the text 'Confirm this is you.' The 'Step Two' section is for password creation. It says 'Password' and '8 alphanumeric characters, min 1 of each, case sensitive'. Two password input fields both contain 'abcd1234', with an arrow pointing to the second field and the text 'Here is the password you will need later.' Below the password fields is a 'create' button, also circled in red. The text 'Do not forget it.' is next to the password fields.

5. Click 'create'.
  - a. Remember your password!
6. The Grand Lodge will mail you a numeric/character based Key (password).
7. Once you get the key, go to Account – Insert Key.

The screenshot shows the 'Account' dropdown menu. The options are 'Login', 'Create Account', 'Insert Key', and 'Login'. The 'Insert Key' option is highlighted with a red oval and a mouse cursor is pointing at it. The text 'this heading:' is visible to the right of the menu.

8. Enter the key that was emailed to you.

The screenshot shows the 'Insert Key' form. At the top, there is a message: 'Enter your key and press insert to store it. If you want to confirm that it is stored, press test.' Below this is the 'Insert Key' section. It has a label 'key:' followed by an empty input field. At the bottom of the form are two buttons: 'insert' and 'test'.

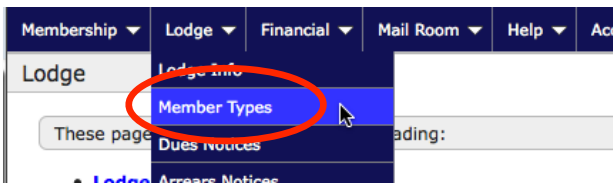
- a. There is a video that shows the entire process on the MORI website.
  - b. Go here: [http://www.vitarara.net/mori\\_blog/getting\\_started](http://www.vitarara.net/mori_blog/getting_started)
  - c. NOTE: If you clear your browser cache, you will have to reenter your key when you reopen your browser.
9. Log in using your membership number and your password that you registered.

- a. NOTE: You created a password and the Grand Lodge creates a 2<sup>nd</sup> password called a Key. The key is nothing more than a second password.

## SETUP YOUR MEMBER TYPES

Every 'Master Mason' will have a 'Member Type'. You must create the member types then assign each Master Mason a 'Member Type'. Member Types are linked to the 'dues' system in Mori so it is important you pay attention to this step. The steps are as follows:

1. Click 'Lodge' 'Member Types'



2. When you begin there will be no member types. You must enter in each of the following member types:
  - a. Regular = (Your FULL 2012 dues amount, including the Grand Lodge per capital and assessments (\$38.25). Add 38.25 to your lodge dues to get the total. Enter the total in the box above. The breakdown for 2011 is as follows:
    - i. 31.25 = per capita (2012)
      1. 37.50 = per capita (2013)
      - 2.
    - ii. 6.00 = Michigan Masonic Charitable Foundation.
    - iii. 1.00 = GWMNMA (George Washington Memorial)
    - iv. 100.00 = your lodge dues. (*this is a sample amount*)
    - v. Total Annual Dues = 132.00 *Enter this amount.*
    - vi. Secretary = 0.00
    - vii. Member Dues Remit = 0.00
    - viii. Prepaid Member = 0.00
    - ix. Honorary Member = 0.00
    - x. Lifetime + Prepaid Member = 0.00
    - xi. Secretary + Lifetime Member = 0.00
    - xii. Secretary + Prepaid Member = 0.00
3. To create a new 'Member Type', type it in the location at the bottom of the screen as shown, add a dollar amount and click 'add'.

Membership ▾ Lodge ▾ Financial ▾ Mail Room ▾ Help ▾ Account ▾

Edit Member Types

Changes to the Member Type(s) have been saved.

Use this form to add/change/delete the member types for your lodge.

**Member Types**

Member Type	Total Annual Dues	Rename Type	Change Dues	Active Members	Delete
Prepaid Member	\$0.00	<input type="text"/>	\$ <input type="text"/>	0	<input type="radio"/> yes <input checked="" type="radio"/> no

**Add Member Type**

New Member Type:   Total Annual Dues: \$

**Members By Member Type**

4. Here we show the newly added 'Regular' Member Type and we are now adding 'Lifetime Member'

Membership ▾ Lodge ▾ Financial ▾ Mail Room ▾ Help ▾ Account ▾

Edit Member Types

Changes to the Member Type(s) have been saved.

Use this form to add/change/delete the member types for your lodge.

**Member Types**

Member Type	Total Annual Dues	Rename Type	Change Dues	Active Members	Delete
Prepaid Member	\$0.00	<input type="text"/>	\$ <input type="text"/>	0	<input type="radio"/> yes <input checked="" type="radio"/> no
Regular	\$150.00	<input type="text"/>	\$ <input type="text"/>	0	<input type="radio"/> yes <input checked="" type="radio"/> no

**Add Member Type**

New Member Type:   Total Annual Dues: \$

**Members By Member Type**

5. When done, it would look like this.

**Member Types** Finished

Member Type	Total Annual Dues	Rename Type	Change Dues	Active Members	Delete
Honorary Member	\$0.00	<input type="text"/>	\$ <input type="text"/>	0	<input type="radio"/> yes <input checked="" type="radio"/> no
Lifetime + Prepaid Member	\$0.00	<input type="text"/>	\$ <input type="text"/>	0	<input type="radio"/> yes <input checked="" type="radio"/> no
Lifetime Member	\$0.00	<input type="text"/>	\$ <input type="text"/>	138	
Member Dues Remit	\$0.00	<input type="text"/>	\$ <input type="text"/>	0	<input type="radio"/> yes <input checked="" type="radio"/> no
Prepaid Member	\$0.00	<input type="text"/>	\$ <input type="text"/>	3	
Regular	\$150.00	<input type="text"/>	\$ <input type="text"/>	150	
Secretary + Lifetime Member	\$0.00	<input type="text"/>	\$ <input type="text"/>	0	<input type="radio"/> yes <input checked="" type="radio"/> no
Secretary + Prepaid Member	\$0.00	<input type="text"/>	\$ <input type="text"/>	0	<input type="radio"/> yes <input checked="" type="radio"/> no
Secretary	\$0.00	<input type="text"/>	\$ <input type="text"/>	1	

a. If you made a mistake in the dues amount. Correct it now... Very important.

edit member types

Changes to the Member Type(s) have been saved.

Use this form to add/change/delete the member types for your lodge.

IF WRONG, Correct it here.  
Click update when done.

Member Type	Total Annual Dues	Rename Type	Change Dues
Honorary Member	\$0.00	<input type="text"/>	\$ <input type="text"/>
Lifetime Member	\$0.00	<input type="text"/>	\$ <input type="text"/>
Member Due Remit	\$0.00	<input type="text"/>	\$ <input type="text"/>
Prepaid Member	\$0.00	<input type="text"/>	\$ <input type="text"/>
Regular	\$150.00	<input type="text"/>	\$156.25
Secretary	\$0.00	<input type="text"/>	\$ <input type="text"/>

update

## INITIALIZE DUES

1. If you do not have a list of your 'Lifetime' and 'Prepaid' member I suggest you get a copy of your last year's annual report. You will need those names to initialize dues.
2. Click 'Financial' 'Initialize Dues'.
3. Assign each ACTIVE Member a Member Type. **Ignore the Inactive Members.** (this is a long list and we did not show the Inactive names here.)

Membership ▾ Lodge ▾ Financial ▾ Mail Room ▾ Help ▾ Acc

Membership

Setup Dues

Edit Arrears / Dues

Initialize Dues

Find Member

4. Notice how each Master Mason in your lodge will have a list box with the new 'Member Types' displayed when you click them.
5. Click and set the correct 'Member Type' for each record.

Grand Lodge of Michigan  
MORI  
Masonic Online Registry Interface

Revised: September 12, 2011

Membership | Lodge | Financial | Mail Room | Help | Account | MORI - DEMO MORI

Initialize Dues

Use this form to set the Member Types, Arrears and Dues for any member for which these values have not already been set.

You can do these incrementally. Update and continue.  
Update button is lower on the page.

Ignore these

Member	Member Type	Total Arrears (Year)	Total Dues (Year)
A194717 - ABRAMS, WILLIAM	Regular	(2009)	(2010)
A197142 - ANZELONE, ENRIQUE	Regular	(2009)	(2010)
A194716 - BAKRI, MRS HELEN CARL	Lifetime Member	(2009)	(2010)
A210694 - BERLIN, ROHAN	Lifetime Member	(2009)	(2010)
A 82146 - BRILEYA, EUGENE D.	Regular	(2009)	(2010)
A196793 - CARLSON, JOHN	Regular	(2009)	(2010)
A198754 - CLARK, HENRY L.	Regular	(2009)	(2010)
A178382 - COHEN, GORDON A.	none	(2009)	(2010)
A211433 - FISHER, JAMES R.	none	(2009)	(2010)
A173990 - FREEMAN III, MARSON HUNTER	Lifetime Member	(2009)	(2010)
A140822 - GAETZ, CHRIS M.	Prepaid member	(2009)	(2010)
A196791 - HAAS, ROBERT JOHN	Regular	(2009)	(2010)

6. Once done, click on the 'update' button on the bottom of the page.
7. This screen shows all the records

Membership | Lodge | Lodges | Grand Lodge | Financial | Mail Room | Help | Other | Account | MORI: Blue Lodge Edition

Doric #0342 - Initialize Dues

Use this form to set the Member Types, Arrears and Dues for any member for which these values have not already been set.

All Member Types set.

Member	Member Type	(Year)	(Year)
M193824 - Abbott, Danny Guy - (Prepaid)	Prepaid Member	(2010)	(2011)
M115107 - Allen, Robert H - (LTM)	Lifetime Member	(2010)	(2011)
M282077 - Allen, David N	Regular	(2010)	(2011)
M093411 - Amon, Martin Richard	Regular	(2010)	(2011)
M093414 - Antvelink, Gerald A	Regular	(2010)	(2011)
M084535 - Averill Jr, Ralph - (LTM)	Lifetime Member	(2010)	(2011)
M114394 - Avila, Rudolfo	Regular	(2010)	(2011)
M093986 - Baker, Frank G - (LTM)	Lifetime Member	(2010)	(2011)
M269800 - Baker, Patrick Jonathon	Regular	(2010)	(2011)
M093985 - Baker, E Bruce - (LTM)	Lifetime Member	(2010)	(2011)
M115088 - Baldwin, Charles E - (LTM)	Lifetime Member	(2010)	(2011)
M093987 - Baldwin, Mark W	Regular	(2010)	(2011)
M084538 - Beardmore, Bruce W	Regular	(2010)	(2011)
M084539 - Belding, Marshall	Regular	(2010)	(2011)
M415811 - Bell, Christopher Timothy	Regular	(2010)	(2011)
M067359 - Benson, Gordon W - (LTM)	Lifetime Member	(2010)	(2011)
M093438 - Berg, Robert C - (LTM)	Lifetime Member	(2010)	(2011)
M114413 - Berglund, Richard A	Regular	(2010)	(2011)
M374537 - Betten III, Henry J	Regular	(2010)	(2011)
M114416 - Bills, Earl T - (LTM)	Lifetime Member	(2010)	(2011)
M086942 - Binsz, Todd A	Regular	(2010)	(2011)
M269801 - Bird, Adam Richard	Regular	(2010)	(2011)
M121843 - Blankenship, James Marion - (LTM)	Lifetime Member	(2010)	(2011)
M093445 - Blayden, Kenneth Lyle - (LTM)	Lifetime Member	(2010)	(2011)
M114422 - Blodgett, Michael J - (LTM)	Lifetime Member	(2010)	(2011)
M193826 - Boss, David A	Regular	(2010)	(2011)

IGNORE  
IGNORE  
IGNORE

## SETUP DUES

Membership ▾ Lodge ▾ Lodges ▾ Grand Lodge ▾ Financial ▾ Mail Room ▾

Doric #0342 - Setup Dues

Before setting up your dues, go to "Lodge" > "Member Types" and confirm that the amounts are correct. Those amounts will be used to generate the dues when this form is submitted.

Enter the year for which the dues will be set and press "setup". This process will take existing dues from other years and make them arrears and will create dues for the specified year based on defined member types. This process can only be undone by hand -- one member at a time.

**Setup Dues**

Year:

- Setup Dues
- Edit Arrears / Dues
- Initialize Dues
- List Paid / Unpaid
- Member Payments
- Non-Member Payments
- Budget
- Vouchers
- Cash Book
- Cash To Treasurer
- Calculate Checkbook

1. Next Setup Dues.
2. If you have used Mori the previous year and have done your dues through Mori, then all dues should be paid up before you proceed with a new year.
  - a. **Any unpaid dues from the previous year will end up as 'arrears'** if you process a new year.

Setup Dues

Before setting up your dues, go to "Lodge" > "Member Types" and confirm that the amounts are correct. Those amounts will be used to generate the dues when this form is submitted.

Enter the year for which the dues will be set and press "setup". This process will take existing dues from other years and make them arrears and will create dues for the specified year based on defined member types. This process can only be undone by hand -- one member at a time.

**Setup Dues**

Year:

**Very Important. Did you set up the correct amounts for the member types?  
Eg: Dues amount correct? If yes, click setup.**

- b. If you 'setup' you dues and your member types are incorrect, or the dues amount is incorrect, you will have to manually edit every member of your lodge. Very time consuming.
  - i. Example, if you forget the 6.25 increase for assessments for the Grand Lodge and do not add that amount in your 'Regular' member type.
  - ii. Make SURE these are correct.
  - iii. If there is an increase in dues, make sure you set these correctly.

- iv. Correct if necessary BEFORE you 'setup dues'. In my example above, these are the amounts set. You will set your own amounts.

Member Type	Total Annual Dues
Lifetime Member	\$0.00
MDR	\$0.00
Prepaid Member	\$0.00
Regular	\$150.00
Secretary	\$0.00

- c. Back to the 'Setup Dues' screen.
  - i. Click 'setup'

Before setting up your dues, go to "Lodge" > "Member Types" and confirm that the amounts are correct. Those amounts will be used to generate the dues when this form is submitted.

Enter the year for which the dues will be set and press "setup". **This process will take existing dues from other years and make them arrears and will create dues for the specified year based on the defined member types. This process can only be undone by hand -- one member at a time.**

**Setup Dues**

Year:

## SETUP FINANCIAL

1. NOTE: Before doing the budget see this video found here:
  - a. [http://www.vitarara.net/mori\\_blog/budget](http://www.vitarara.net/mori_blog/budget)
2. Before we show collecting dues, we need to setup the budget for income and expenses.
  - a. At a starting point go to the Grand Lodge website and print out a 990 report.
  - b. <http://www.grandlodgemi.org/990report/>

### Income Statement - (Receipts)

1.	Total Dues Remitted:	<input type="text"/>
2.	Fees Earned:	<input type="text"/>
3.	Interest & Dividends from Investments: (Earned during the year)	<input type="text"/>
4.	Entertainment/Meal Receipts:	<input type="text"/>
5.	Contributions, Gifts Received:	<input type="text"/>
6.	Other (Include Sale of Investments and/or Inventory Adjustments)	<input type="text"/>
7.	<b>Total Receipts:</b>	<b>\$0.00</b>

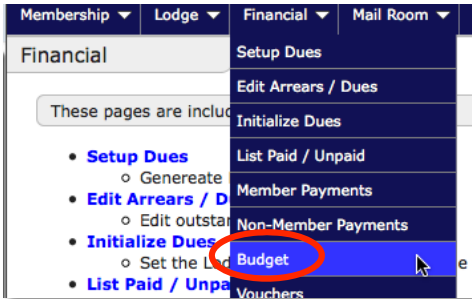
Do not add line 7  
to the budget.

### Disbursements

8.	To Grand Lodge per Capita:	<input type="text"/>
9.	To Grand Lodge Assessments:	<input type="text"/>
10.	Rentals or Assessments:	<input type="text"/>
11.	Salaries and Wages:	<input type="text"/>
12.	Payroll Taxes (FICA, FUTA, WH):	<input type="text"/>
13.	Printing, Postage, Office Supplies:	<input type="text"/>
14.	Bulletins, Notices:	<input type="text"/>
15.	Entertainment/Meals:	<input type="text"/>
16.	Flowers, Funerals:	<input type="text"/>
17.	Charity and Relief:	<input type="text"/>
18.	Returned Dues and Fees:	<input type="text"/>
19.	Professional Services, Tiler, Organist, etc.:	<input type="text"/>
20.	Jewels and Regalia:	<input type="text"/>
21.	Maintenance:	<input type="text"/>
22.	Audit and Insurance:	<input type="text"/>
23.	Other (Include Investments Purchases):	<input type="text"/>
23a.	and/or Inventory Adjustments):	<input type="text"/>
24.	<b>Total Disbursements:</b>	<b>\$0.00</b>
25.	<b>Gain or Loss from Operations:</b>	<b>\$0.00</b>

Do not add lines  
24 or 25 to the budget.

- c. Fill this in, with the assistance of your finance committee or even look at your last years to give you a starting point for the year.
- d. Next go to the 'Financial' 'Budget'



- e. Key in these first: (you can change these later).

A screenshot of the 'Expense Items' form. The 'Description' field is highlighted with a red box. Red text annotations are present: 'Have your finance committee define these.' next to the first field, and 'This is an example. Be careful, they sort alphabetically by category then description.' next to the second field. The form title is 'Expense Items'.

- f. Next key in each budget item and expense item.
  - i. Talk with your finance committee or book keeper/accounting on the budget.
  - ii. The budget is not a required item but can be very useful.
- g. DO NOT recreate a '1. Total Dues Remitted' account. This is already done for you and is simply called Dues.
  - i. You still need to enter a dollar amount for your dues entry.

A screenshot of the 'Income Categories' form. The 'Description' field is highlighted with a red circle and contains the text 'DUES'. The 'Amount' field is also highlighted with a red circle and contains the value '10000.00'. Red text annotations are present: 'This account is created for you. Do not create account 1. Total Dues Remitted. Use this instead.' next to the 'DUES' entry. The form title is 'Income Categories'.

**Enter Budgets**

Changes to the Budget have been saved.

Use this form to enter and update your current budget.

**Income Categories**  
Use this form to manage your budget categories. Only active categories are eligible to have budget items. A category with items associated cannot be deleted.

Description	Amount	Delete
DUES	<input type="text" value="10000.00"/>	
<input type="text" value="2. Fees Earned"/>	<input type="text" value="1000.00"/>	<input type="radio"/> yes <input checked="" type="radio"/> no
<input type="text" value="3. Interest and Dividends"/>	<input type="text" value="1000.00"/>	<input type="radio"/> yes <input checked="" type="radio"/> no
<input type="text" value="4. Entertainment/Meal Receipts"/>	<input type="text" value="500.00"/>	<input type="radio"/> yes <input checked="" type="radio"/> no
<input type="text" value="5. Contributions, Gifts Received"/>	<input type="text" value="500.00"/>	
<input type="text" value="6. Other"/>	<input type="text" value="5000.00"/>	<input type="radio"/> yes <input checked="" type="radio"/> no
<input type="text"/>	<input type="text"/>	

**Expense Categories**  
To set up the current year's budget items against which orders are drawn, enter the values into the fields below.

Description		Delete
<input type="text" value="Grand Lodge Expenses"/>	Have your finance committee define these.	
<input type="text" value="Lodge Expenses"/>	This is an example. Be careful, they sort alphabetically by category then description.	
<input type="text"/>		

**Expense Items**  
Add, Modify, or Delete these income categories. These categories are used for budget reporting only.

Description	Category	Amount	Delete
<input type="text" value="8. To Grand Lodge per Capita"/>	<input type="text" value="Grand Lodge Expenses"/>	<input type="text" value="3000.00"/>	<input type="radio"/> yes <input checked="" type="radio"/> no
<input type="text" value="9. To Grand Lodge Assessments"/>	<input type="text" value="Grand Lodge Expenses"/>	<input type="text" value="500.00"/>	<input type="radio"/> yes <input checked="" type="radio"/> no
<input type="text" value="10. Rentals of Assessments"/>	<input type="text" value="Lodge Expenses"/>	<input type="text" value="0.00"/>	
<input type="text" value="11. Salaries and Wages"/>	<input type="text" value="Lodge Expenses"/>	<input type="text" value="0.00"/>	<input type="radio"/> yes <input checked="" type="radio"/> no
<input type="text" value="12. Payroll Taxes (FICA, FUTA, WH)"/>	<input type="text" value="Lodge Expenses"/>	<input type="text" value="0.00"/>	<input type="radio"/> yes <input checked="" type="radio"/> no
<input type="text" value="13. Printing, Postage, Office Supplies"/>	<input type="text" value="Lodge Expenses"/>	<input type="text" value="1000.00"/>	
<input type="text" value="14. Bulletins, Notices"/>	<input type="text" value="Lodge Expenses"/>	<input type="text" value="500.00"/>	<input type="radio"/> yes <input checked="" type="radio"/> no
<input type="text"/>	<input type="text" value="---"/>		

We will print later. →

Do not close your budget till the end of your financial period. ←

3. Click 'update' for each new entry to the Budget.
4. Once done, do NOT close the budget period. Talk with your finance committee about this.

## COMMENTS

Following these initial steps will get you started on Mori. Failure to follow them may cost you later on when you are trying to work on your dues or you budget. Better to do them now, even if you don't think you need to. It may save you some frustration in the future.