




**INTEGRATING CLMS  
WITH  
LAPSATION PROCESS**



**CLMS program has the ability to integrate with the Lapsation program. Each month there should be something being sent from the CLMS system.**

**Letters in the Mail Merge can be edited and can be sent snail mail, email, or both.**

**Lodge Membership Chairman and Lodge Secretary need to work together.**



**JANUARY – Mail Dues Statements to all members.  
Those that delinquent will be billed for  
next year’s dues and delinquent dues.**

**FEBRUARY – Begin processing dues payments  
Mail Final Notice to Delinquents**

**MARCH - On or before 31<sup>st</sup> – drop delinquents**

**APRIL – Send 60 Day notice to members dropped in  
March**

**Send dues statements to Delinquent Members**



**MAY – Mail Delinquent Form Letter May to delinquent members**

**JUNE – Mail Gathen 1 Letter**

**JULY – Mail Gathen 2 Letter**

**AUGUST – Mail Delinquent Dues Statement**

**SEPTEMBER – Mail Gathen 3 Letter**

**OCTOBER – Mail GER Appeal Letter**

**NOVEMBER – Mail Delinquent Form letter November**

Lodge: 1962 Last Name/# MEMBERS Only [NO Filters] Active Name Sort Reset

Report Output options for the Print Report Button only

- Preview/Print  MS Word (RTF)
- HTML  Adobe PDF

Send mail:

Data Sources

- Anniversaries
- Associate Member Cards - Active
- Associate Member Stmt - Active
- Birthdays
- Candidates
- Deceased Members
- Delinquent Members - Active**
- Directory
- Draw Members - Active
- Dropped Members - Inactive
- Email Directory
- Form 5505 Info
- Forum Members - Active
- Honorary Life Members
- Identification Cards

Delinquent Members - Active Data Source Parameters

Delinquent Type:

Check to Exclude Undeliverables:

Check to Exclude Send No Mail:

Description:

Letter Name	# of Downloads	Shared	Custom
1 Basic Letter	14	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1 Basic Letter Copy 1	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1_Basic Letter - From Chicago Northshore #1316	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2 Delinquent Member Letter	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2 Delinquent Member Letter Copy RF	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2_New Member Letter - From Chicago Northshore #1316	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2012 Membership Letter	13	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3 Letter to Applicants	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3_Letter to Applicants - From Chicago Northshore #1316	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4_Stray Elk Letter - From Chicago Northshore #1316	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5 Stray Elk Letter	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5_April 1 Letter to Member dropped March 31	37	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
6 and 12 month Delinquent	36	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
60 Day Reinstatement Letter	0	<input type="checkbox"/>	<input type="checkbox"/>
60 Day Reinstatement Letter Copy 1	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
60 Day Reinstatement Letter For #10 Window Envelopes	0	<input type="checkbox"/>	<input type="checkbox"/>
Affiliation	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AFFILIATION/TRANSFER BALLOTTED FAVORABLY	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
BASIC LETTER ER VERSION FL2509	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Basic Letter Format	0	<input type="checkbox"/>	<input type="checkbox"/>

# GATHEN LETTER 1

June 8, 2017

Hi [!DetailFirstName]:

*Just a gentle reminder. We have not received you annual dues payment of \$\_\_\_\_\_, which was due on April 1st, 2017. Please send it to us right away in the enclosed envelope.*

You can also go online to our lodge website and pay with a major credit/debit card right away at **.com**. That's fast and convenient and just takes a minute or two .

*Please feel free to give me a Call \_\_\_\_\_ or email \_\_\_\_\_ with any questions or concerns.*

*Stay well and we hope to see you soon down at the lodge.*

*Fraternally,  
Joyce Powell, PDD  
Lodge Secretary*

# GATHEN LETTER 2

June 8, 2017

Hi [!DetailFirstName]:

*Have you forgotten to send us your annual dues payment? The amount of \$\_\_\_\_\_ was due on April 1st, 2017.*

*If you have not already mailed it to us, please do so today in the enclosed envelope.*

*You can also go online to our lodge website and pay with a major credit/debit card right away at **.com**. That's fast and convenient and just takes a minute or two.*

*Please feel free to give me a call at \_\_\_\_\_ or email \_\_\_\_\_ with any questions or concerns.*

*Stay well and we hope to see you soon down at the lodge.*

*Fraternally,  
Joyce Powell, PDD  
Lodge Secretary*

# GATHEN LETTER 3

June 8, 2017

Dear [!DetailFirstName]:

I have written to you three times without any answer concerning your annual dues of \$\_\_\_\_\_ which was due on April 1st, 2017. We have also tried to contact you by phone, but again without success.

I am surprised in not hearing from you since you have been a good and reliable member for X years.

If there is a health or financial hardship please give me a call at 201-320-3670 or email me at [hhelks1962@optonline.net](mailto:hhelks1962@optonline.net) explaining your unfortunate situation so I can work with you.

*Remember...You can go online to our lodge website and pay with a major credit/debit card right away at **hhelks1962.org**. That's fast and convenient and just takes a minute or two.*

*Fraternally,  
Joyce Powell, PDD  
Lodge Secretary*



# PHONE-A-THON QUESTIONNAIRE

Member name and number: Member Number: Member Type:

Sponsor: [!DetailProposerAtInitiation]

Home phone:

Disconnected/Wrong #: \_\_\_\_ No Answer: \_\_\_\_ Answering Machine: \_\_\_\_ Left Message: \_\_\_\_

Cell Phone:

Disconnected/Wrong #: \_\_\_\_ No Answer: \_\_\_\_ Answering Machine: \_\_\_\_ Left Message: \_\_\_\_

Member Years: o

The amount of delinquent dues to is \$ \_\_\_\_\_

1. Do you intend to renew your membership Yes \_\_\_\_\_ No \_\_\_\_\_

2. If no, reason why

\_\_\_\_ Illness

\_\_\_\_ Dues to high

\_\_\_\_ Not interested in social or lodge activities

\_\_\_\_ No one asked me to participate

\_\_\_\_ Officers to cliquish. Members ignored me.

\_\_\_\_ No longer live in the area. Would you consider transferring to another lodge Yes \_\_\_\_\_

No \_\_\_\_\_

3. Is there anything we can do to change your decision not to renew?

4. Comments or recommendations:

Person Performing Contact:

\_\_\_\_\_