MyLegion.Org

EVERYTHING YOU THOUGHT YOU WANTED TO KNOW

DEPT OF MN TRAINING COMMITTEE

DISCLAIMER: MyLegion.Org is a product of the National American Legion. The product is still evolving and the information here is as current as of the writing of the document. October 25, 2022

Registration

In order to get access to MyLegion.org, you need to be registered with the National site. **Please note** before registering make sure the email you will be registering with is the same email that is already on the National site. To do this, check with one of the following people

Your Post Commander

Your Post Adjutant

Your District Commander

Your District Adjutant

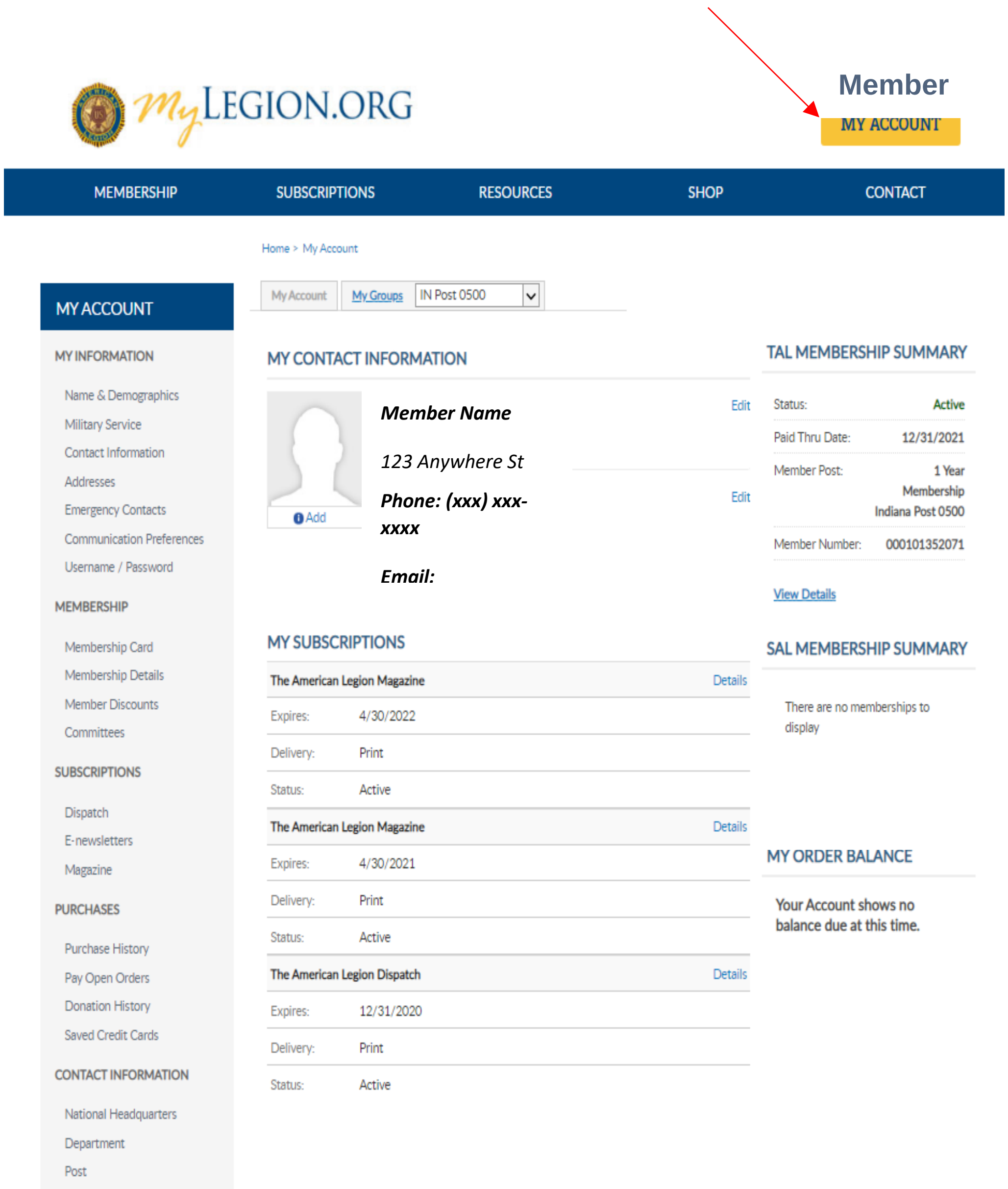
Your District MyLegion.org Training Rep

The Post Commander/Adjutant automatically get access to the Post, based on their position within the Post. The District Commander/Adjutant automatically get access to the District based on their position within the District. When the Post/District submits their report showing new leadership National changes the access.

The Post Commander/Adjutant are the only ones that can grant permission to the Post information. The District Commander/Adjutant are the only ones that can grant permission to the District Information. Getting District access does not authorize a person Post access.

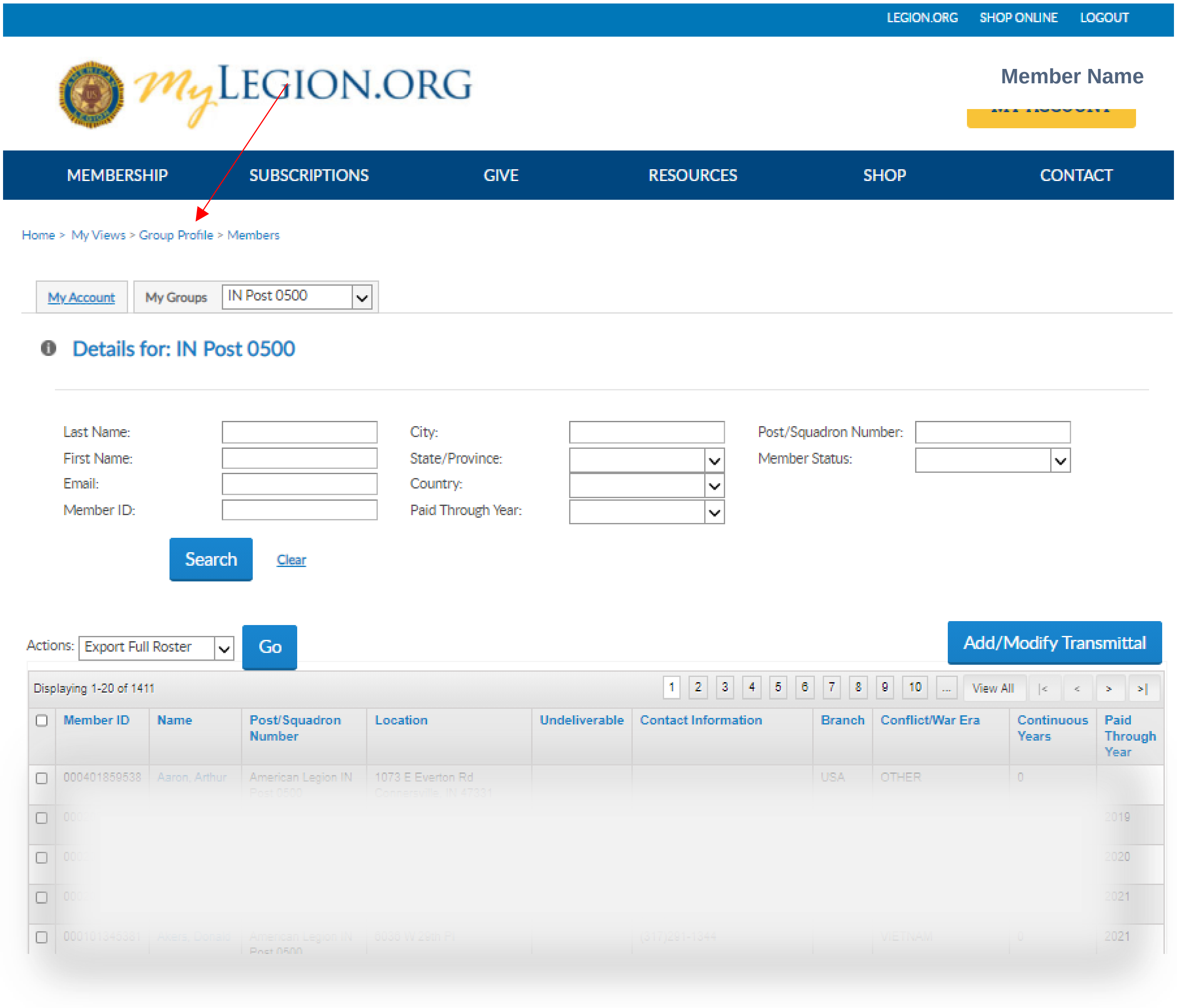
MyLegion.org Basics

The Gold “My Account” button will always bring you back to your main page “My Contact Information”



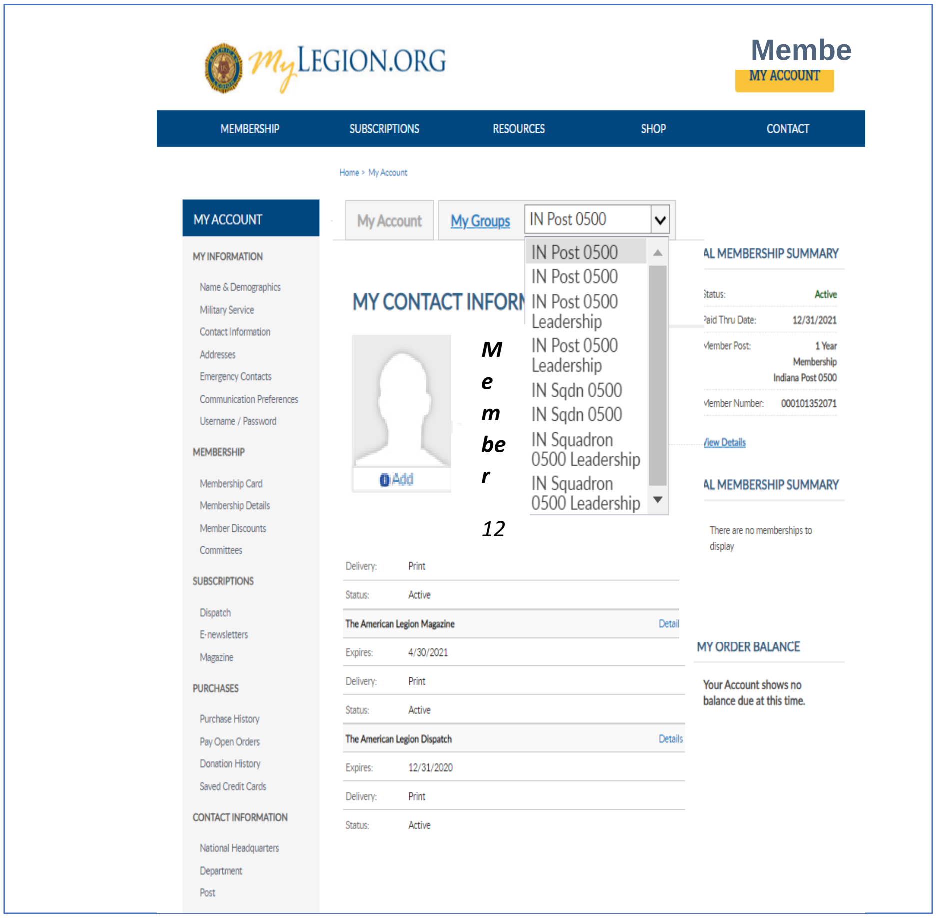
Any item in “Blue” is a hyperlink and opens that item.

Clicking on "Group Profile" brings you back to the Groups main page.

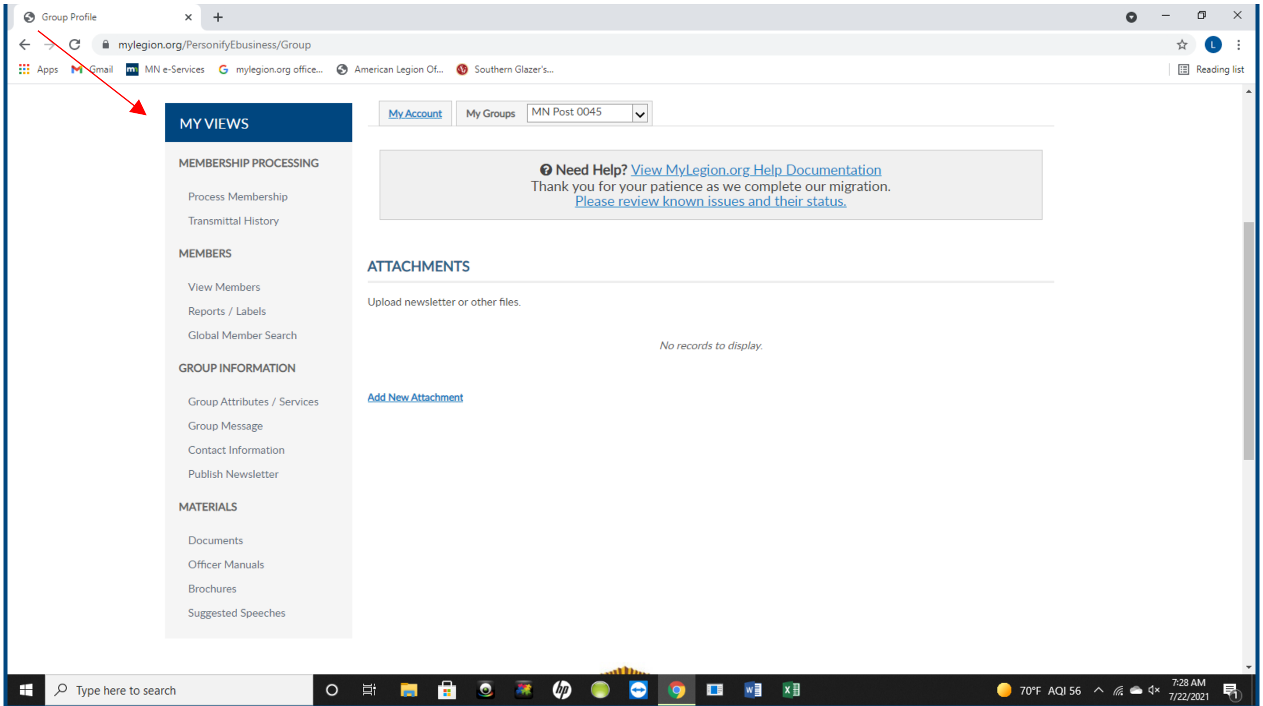


Membership Options

From your "My Account" page, select the post you wish to process membership for, NOT the Post Leadership and then click "My Groups". This will bring up your Post/Sq/District.



On the left-hand side of the page, you will see



MY VIEWS

MEMBERSHIP PROCESSING

- **Process Membership** – Process your membership transmittals
- **Transmittal History** – look at your transmittal history (does not include online renewals)

MEMBERS

- **View Members** – View your members – this is where you will be able to make changes to members
  - information
- **Reports / Labels** – Labels, reports – including seeing those members that renewed online
- **Global Member Search** – find a member-will need either the members ID number or first and last
  - name and post they belong to.

GROUP INFORMATION

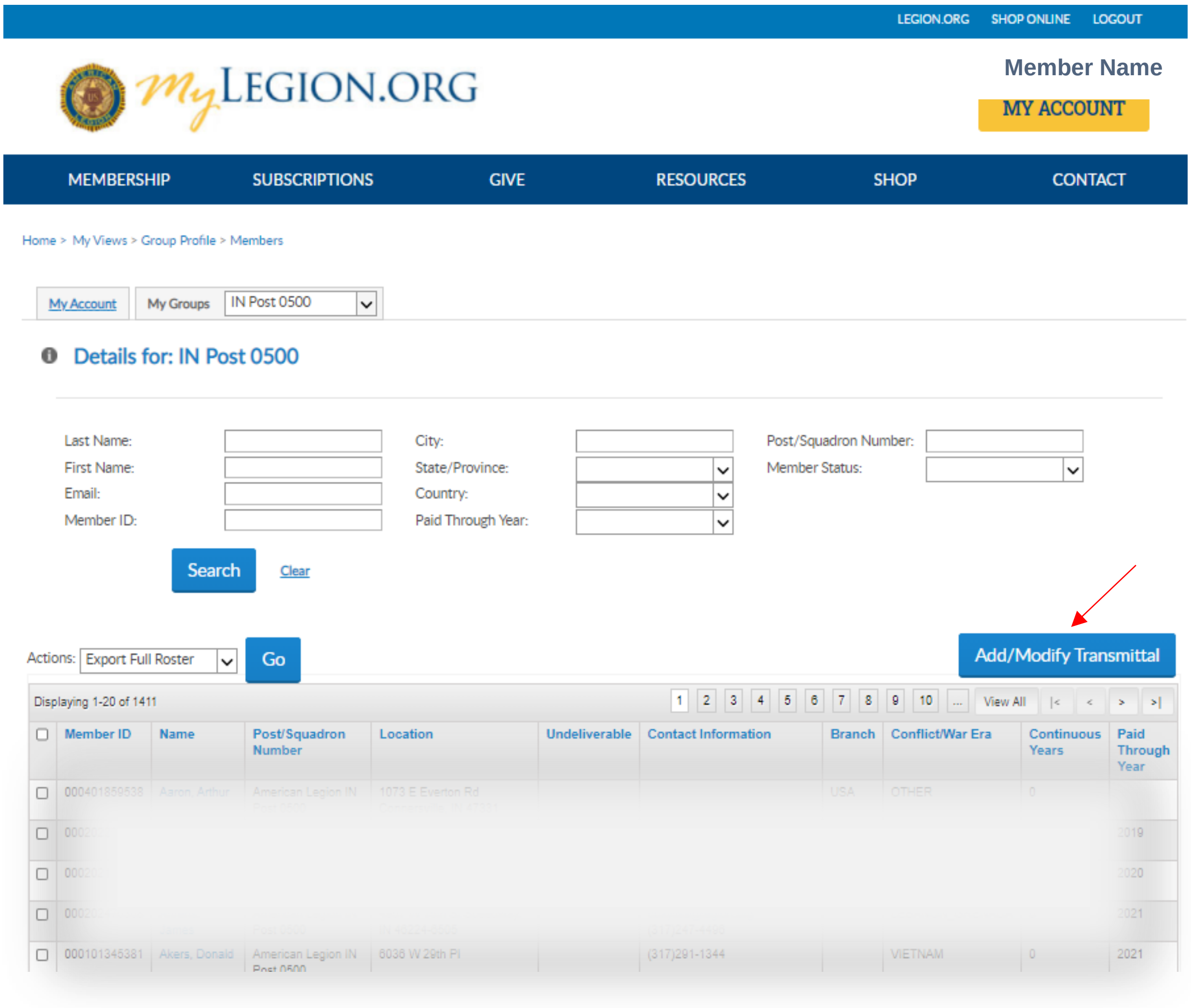
- **Group Attributes / Services** – You can select various options your past may offer
- **Group Message** – you can create a message for everyone in your post.
- **Contact Information** – contact information for your post, phone, email.
- **Publish Newsletter** – publish a newsletter for your members to read

MATERIALS

- **Documents** – various documents that the Department or National puts out
- **Officer Manuals** -most of the various manuals, (Officers Manual, Adjutants Manual, District Officers
  - Guide, etc)
- **Brochures** – Most of the brochures that are downloadable and/or printable
- **Suggested Speeches** – suggested speeches for Memorial Day Veterans Day, Flag Day, etc

Membership Processing

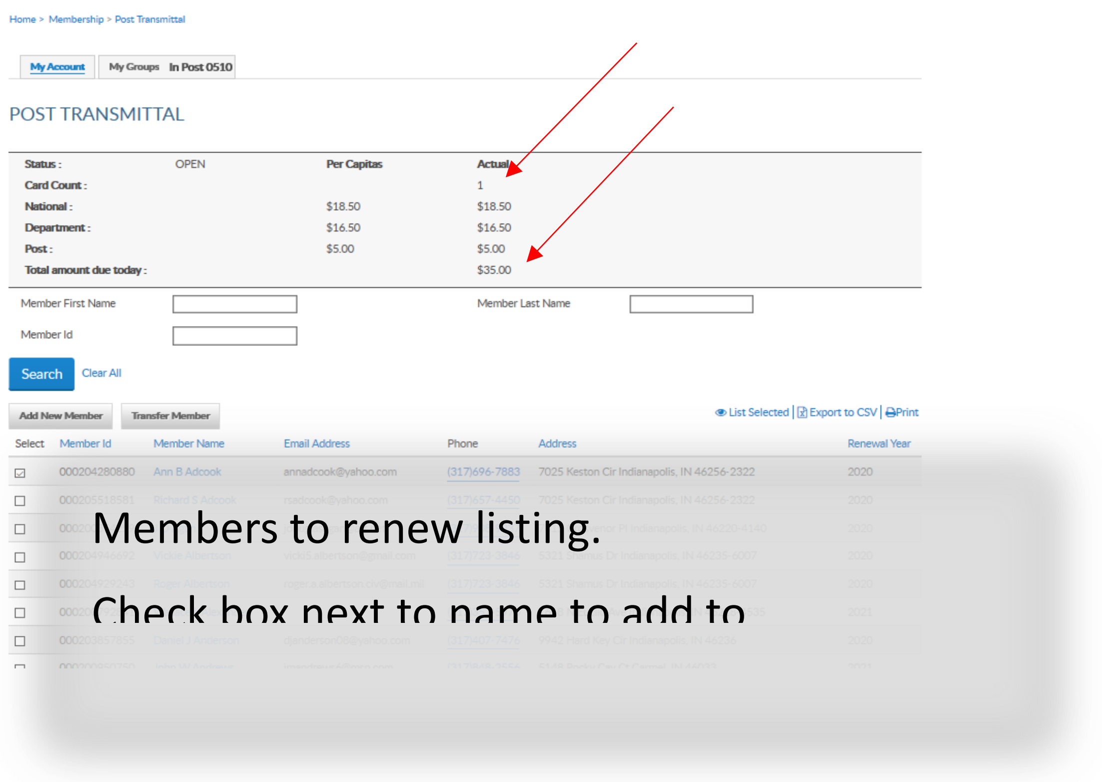
To process a membership, click on "Process Membership" First item on the left-hand side under "Membership Processing"



You will then click on the Add/Modify Transmittal button in Blue on the right-hand side.

You can either search for the member by name or ID **OR** you can select the desired member by checking on the small box on the left of the members name. **<u>As a reminder</u>**, if a person has not renewed for the past up to two years, they will show up for the years they have not renewed. Be sure to look to the far right to select the correct "Paid Through Year" you wish to renew the member for.

You can select more than one person when submitting the transmittal. Once all members you wish to renew have been added, click "SAVE" then add new members and transfers (covered in the next section), review the top part of the screen to ensure that the "Card Count" is correct, and the “Total Amount Due Today” is correct, this is what they will take out of your bank account.   The Post amount is actually your District Dues plus the .25 that goes to the Minnesota Hospital Association fund. Select “Finalize” from the right-hand side.

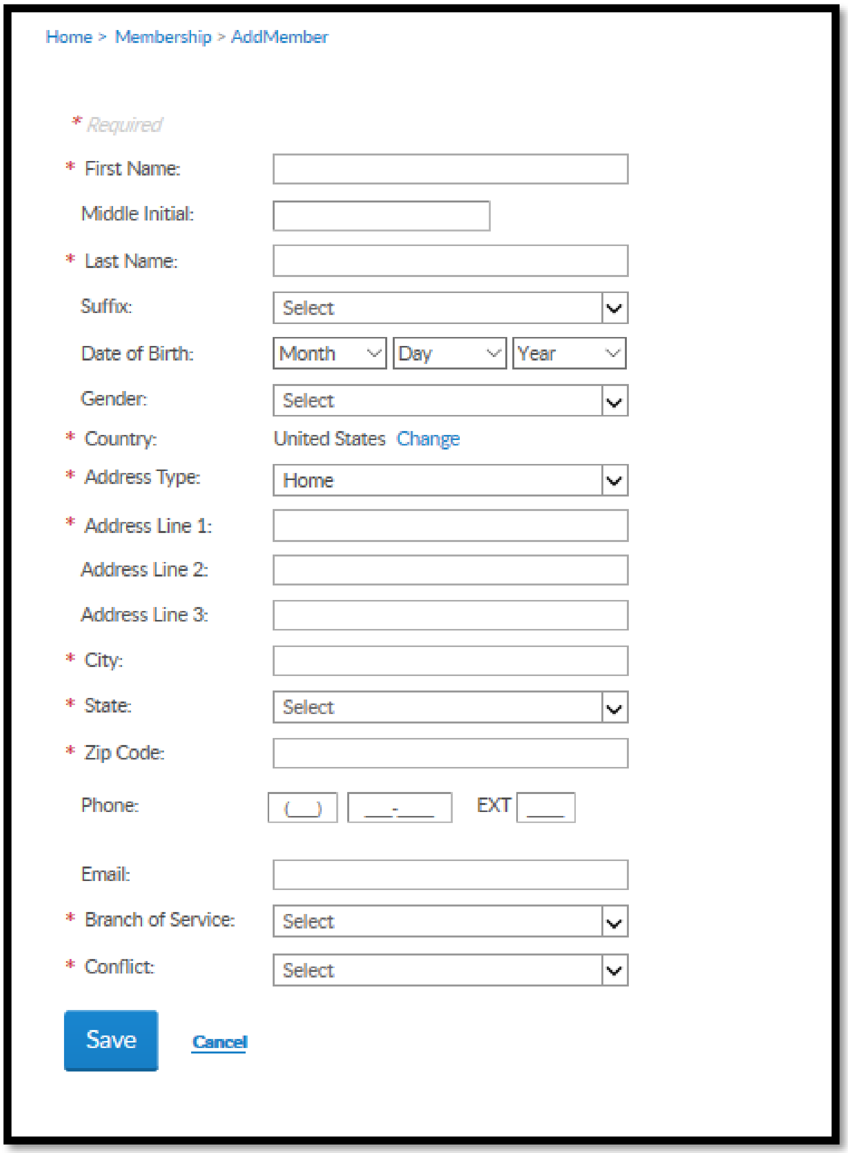


Adding/Transferring a Member

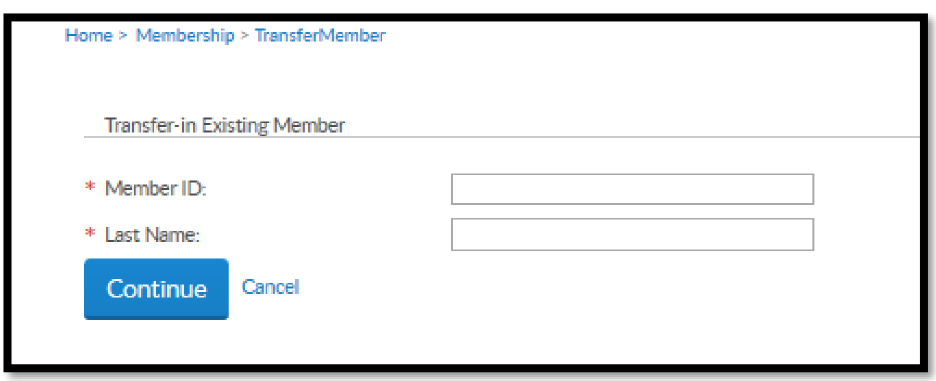
To add a new member or transfer a member into your post, on the Post Transmittal screen select the “Add/Transfer Member” on the left-hand side under the blue SEARCH button.

- **<u>New member</u>- never been a TAL member or SAL member (New Member)**
- **Current or former member (Transfer)**

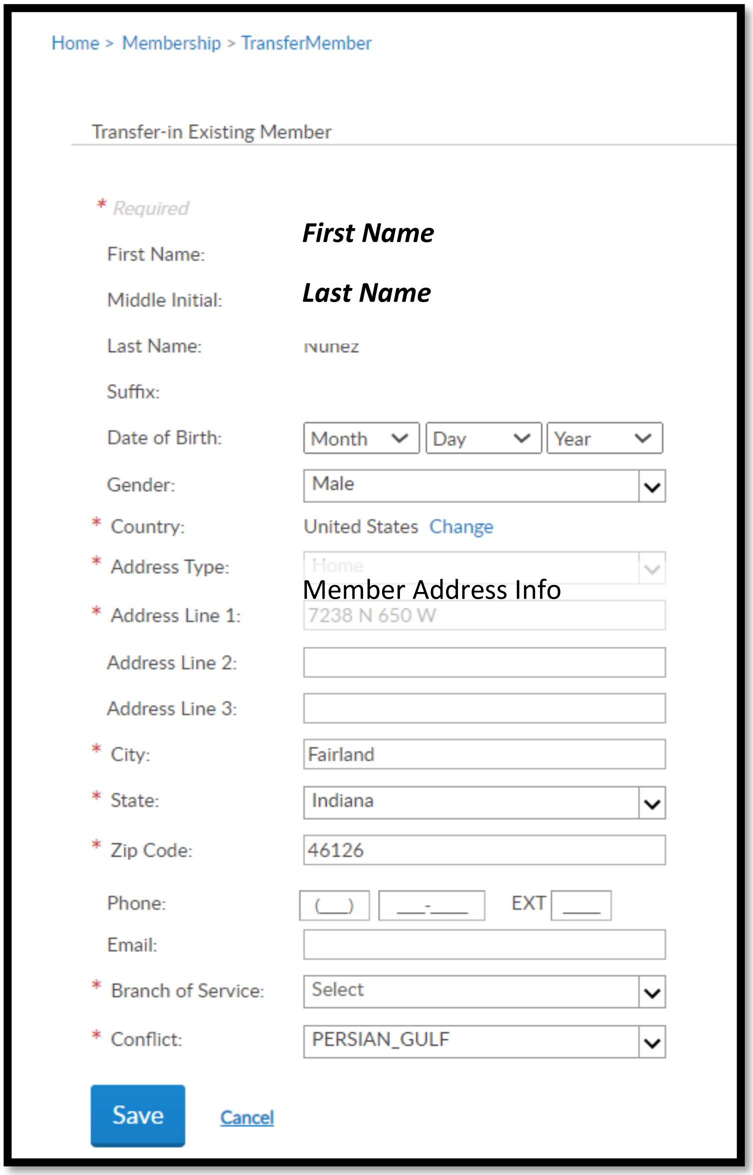
For a new member you will need to enter all the information on the next screen that has a red * in front of it and then select “Save”.



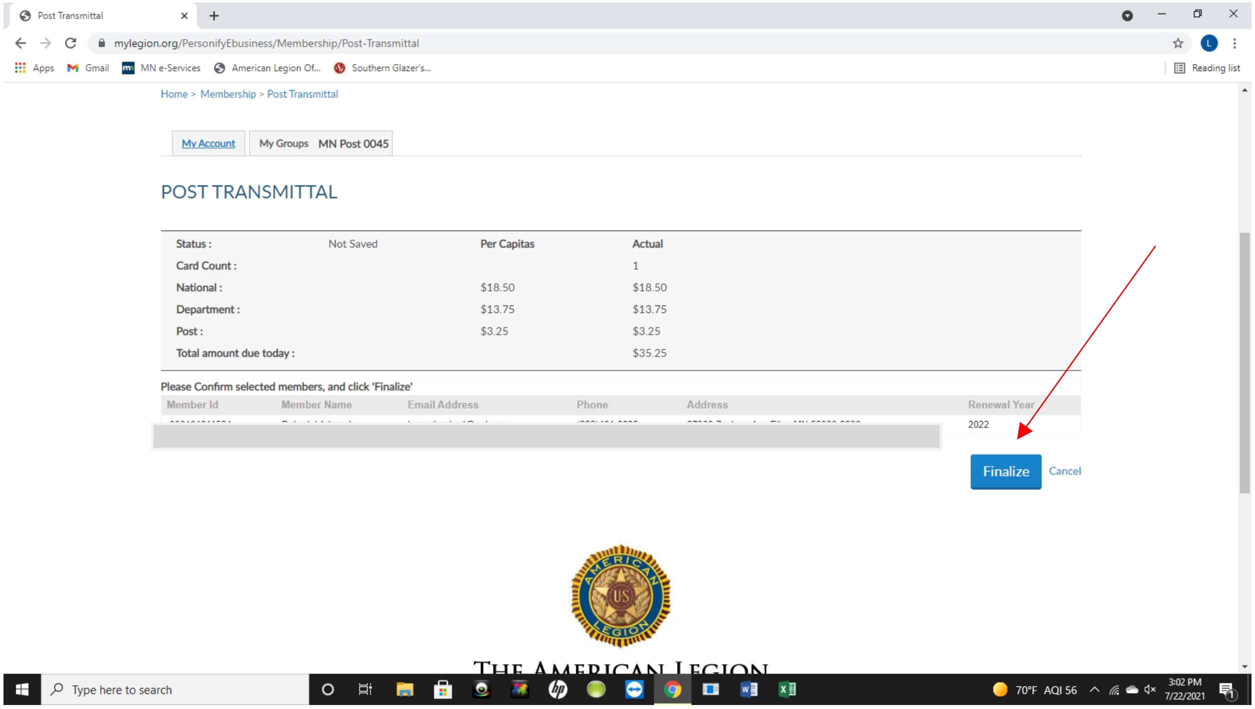
For a Transfer, you will need the members Last Name and member ID Number, select Continue.



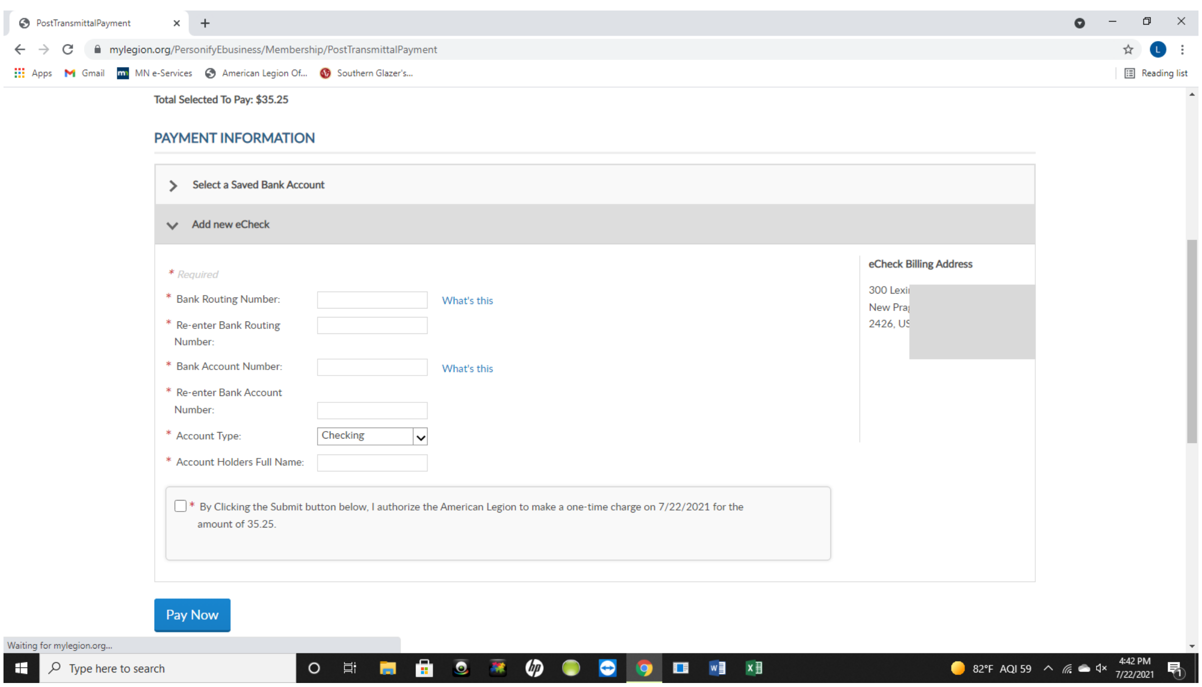
You will then need to verify the information is correct. Make any corrections and SAVE



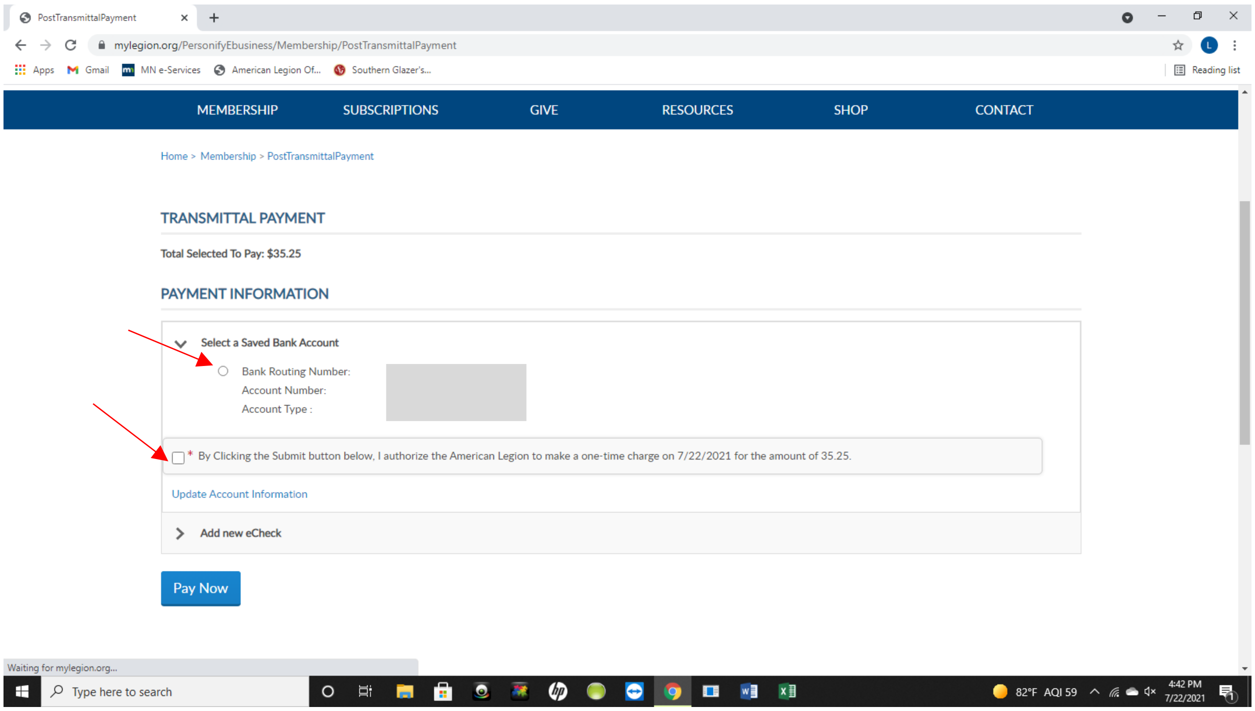
Once all you Renewals/Transfers/New Members are added to the Transmittal, you will select Finalize. Confirm all the members are listed and the Total Amount Due Today is correct, select Finalize again



If you have not set up your banking information, you will need to enter the Bank Routing Number, Bank Account Number, Type of Account and Account Holders full name. You will also need to check the box authorizing the American Legion to make a one-time charge to your bank account – the amount of the charge should be equal to your transmittal amount. <u>You will not be able to process any additional membership until this transmittal has gone totally through the system.</u>

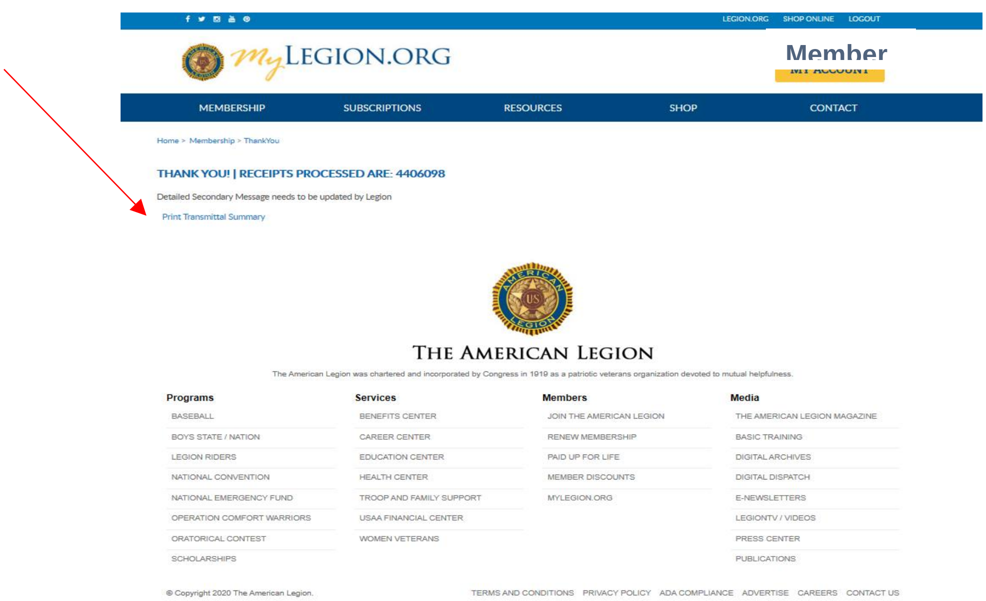


If you have already set up your banking information, you will select the account you wish the funds to come out of (there is a radio button in front of each account). You will also have to check the box authorizing the American Legion to make a one-time charge to your bank account – the amount of the charge should be equal to the amount of your transmittal.



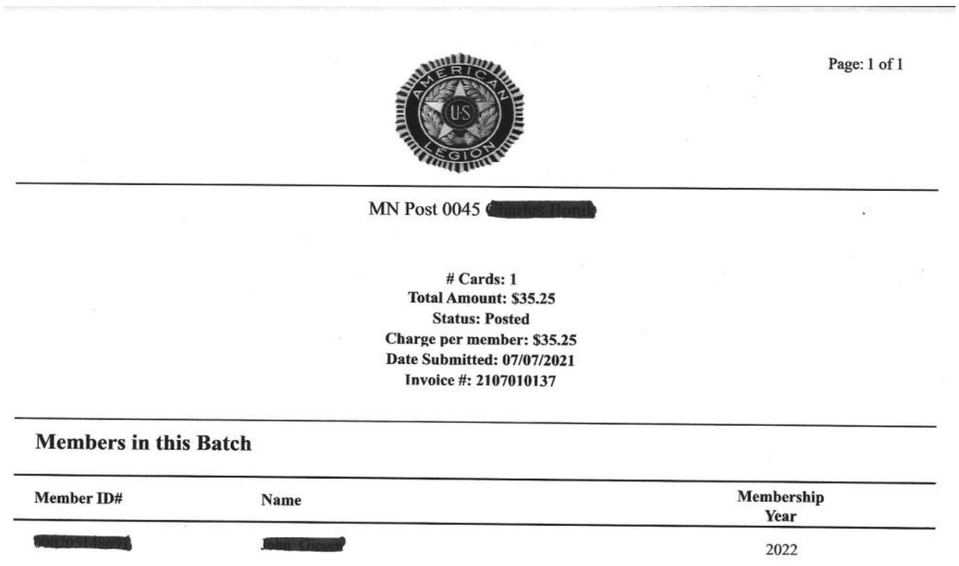
On this screen you will also be able to change your banking information or add additional accounts if needed.

Once completed, click "Pay Now", you will receive a "Thank You and an option to print a receipt. You will be able to print the receipt by clicking on "Print Transmittal Summary"



Transmittal History

Your receipt will show the names of the members in the batch-this comes out in Member Number ID order, not alphabetical. This is used to see the membership that has been processed by the Post via MyLegion.org or through the mail, it does not include those members that have renewed online.



Page: 1 of 1

MN Post 0045 [redacted]

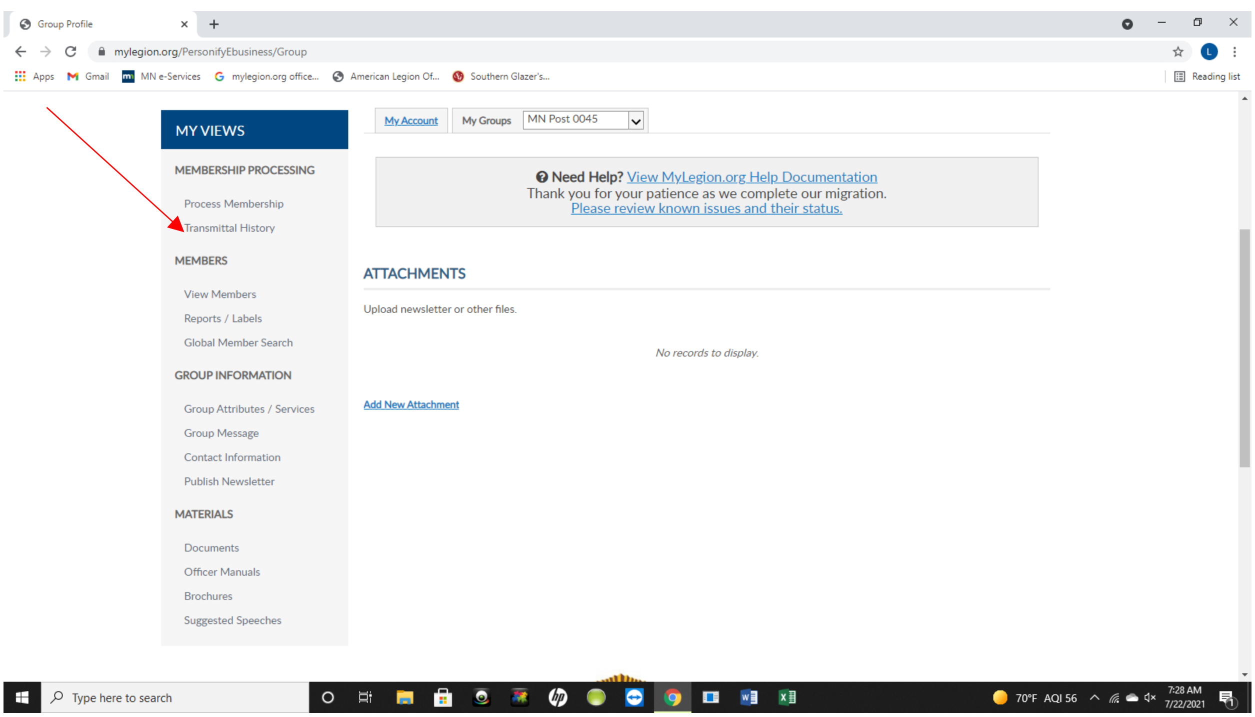
 # Cards: 1
Total Amount: $35.25
Status: Posted
Charge per member: $35.25
Date Submitted: 07/07/2021
Invoice #: 2107010137

Members in this Batch

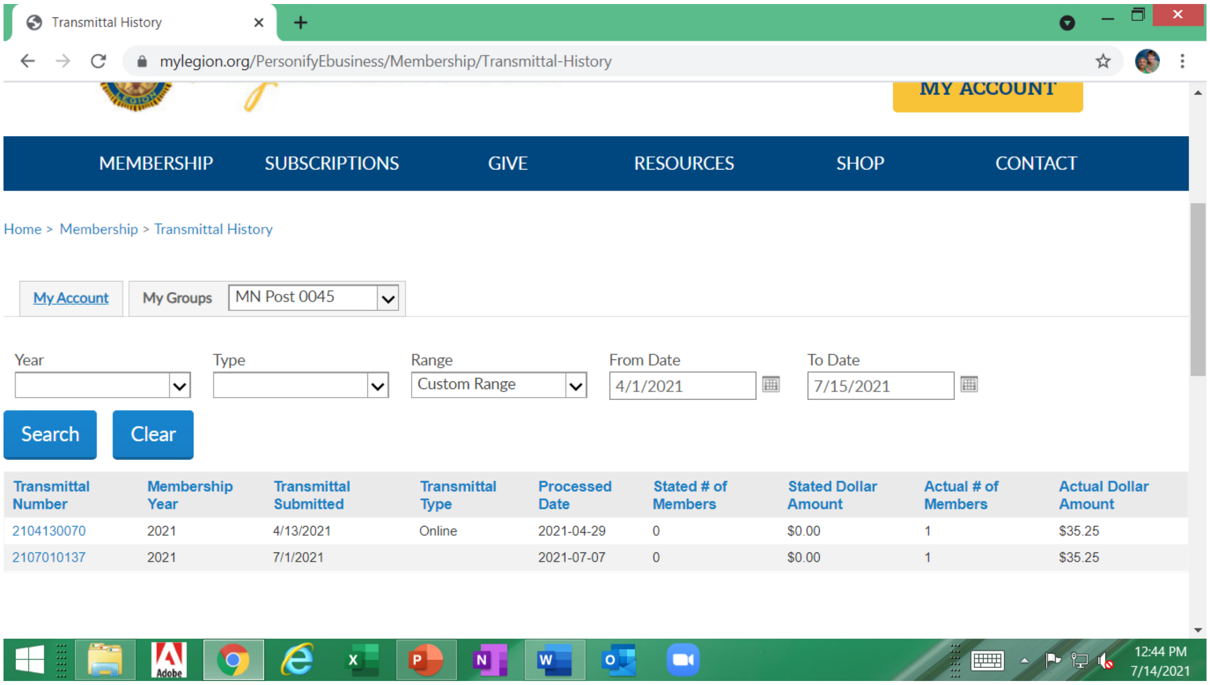
Member ID#	Name	Membership Year
[redacted]	[redacted]	2022

Transmittal History

To look up a transmittal, select Transmittal History

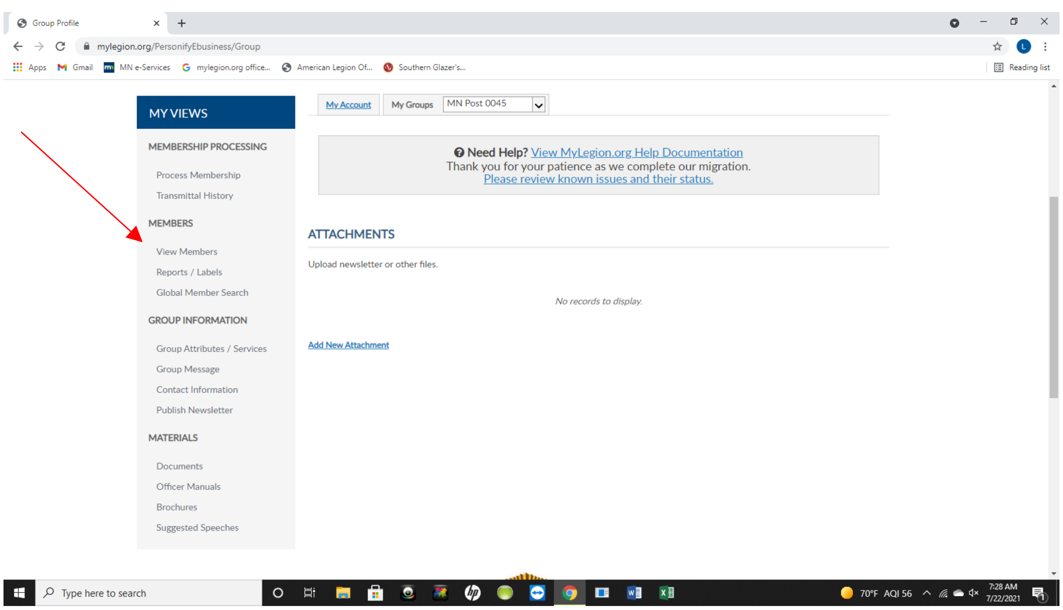


Select the Year, Type (Online or Mail) and Range (Date Range)

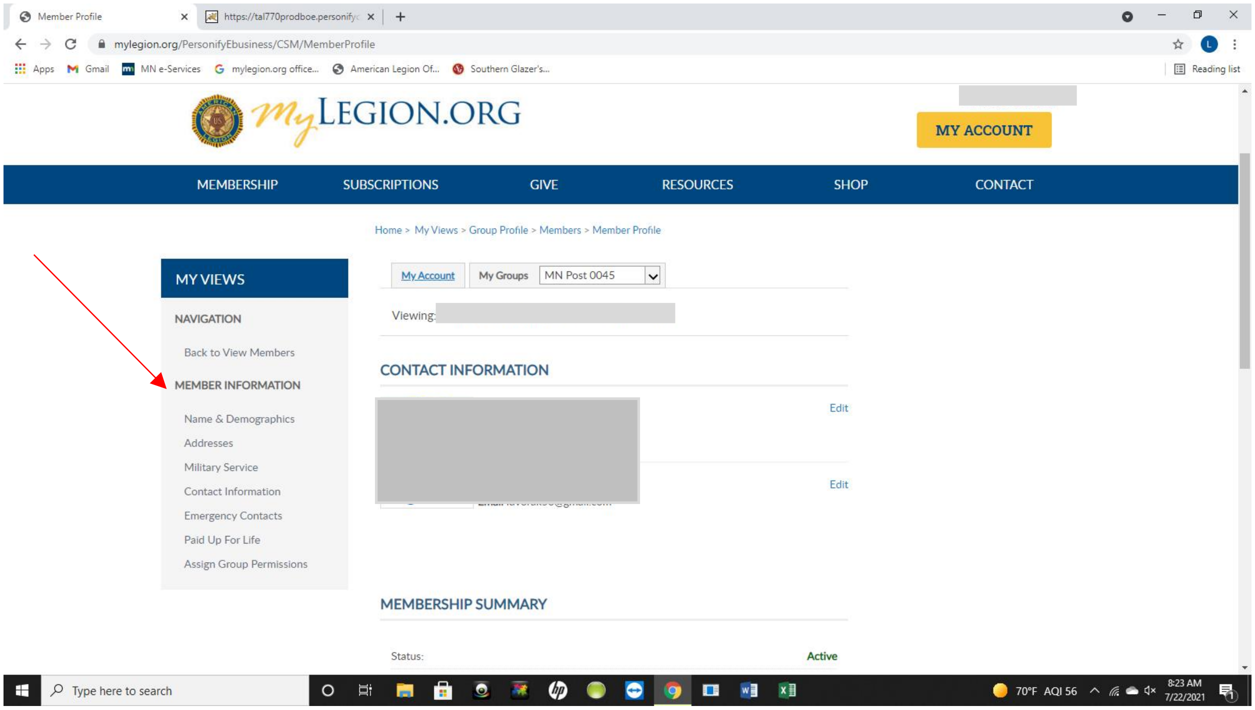


If you leave the Year and Type blank you will get all your transmittals. You can select the transmittal you wish to review by selecting the transmittal number, which is blue under Transmittal Number. This will give you a copy of the receipt for that transmittal. Transmittal Submitted is the date you hit the Pay Now button, the Processed Date is the date it was processed at National.

View Members



From the View Members area, you can make necessary changes to a member's profile. You can either search for a member or select the member from the list (click on the individual name in blue). From here you can edit the Name & Demographics, Address, Military Service, Contact Information, Emergency Contact, you can also apply for a PUFL. Any area that has a blue Edit button can be changed. Make sure to "SAVE" if you make any changes



Name & Demographics – Name, Nickname, Credentials, Birthdate, Gender, Employment, and if the member is Deceased

Addresses – Main Address. You can also add an additional address

Military Service – Branch, Conflict, Retired Status

Contact Information – Phone (you can list more than one), E-mail (you can list more than one), Web/Social Media sites, Fax Number

Emergency Contact – Self Explanatory

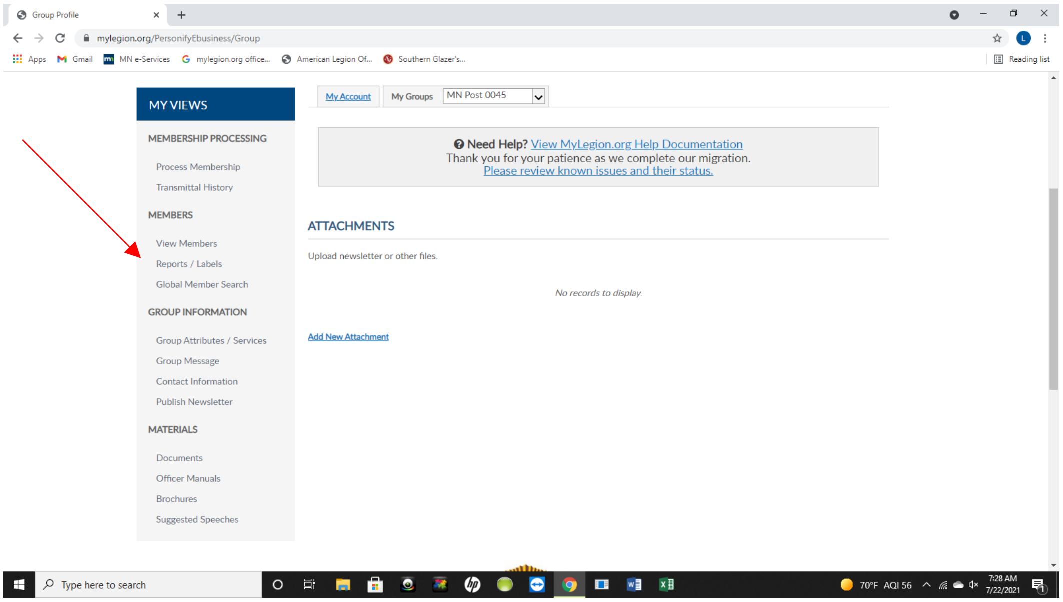
Committees – This lists all Past and Present Committees and Positions at the Post, District, Department or National level.

Paid Up for Life – If you are not a PUFL – you can apply here.

Assign Group Permissions – If you are the Commander or Adjutant of the Post or District you have the ability to give other members access to your Post or District here.

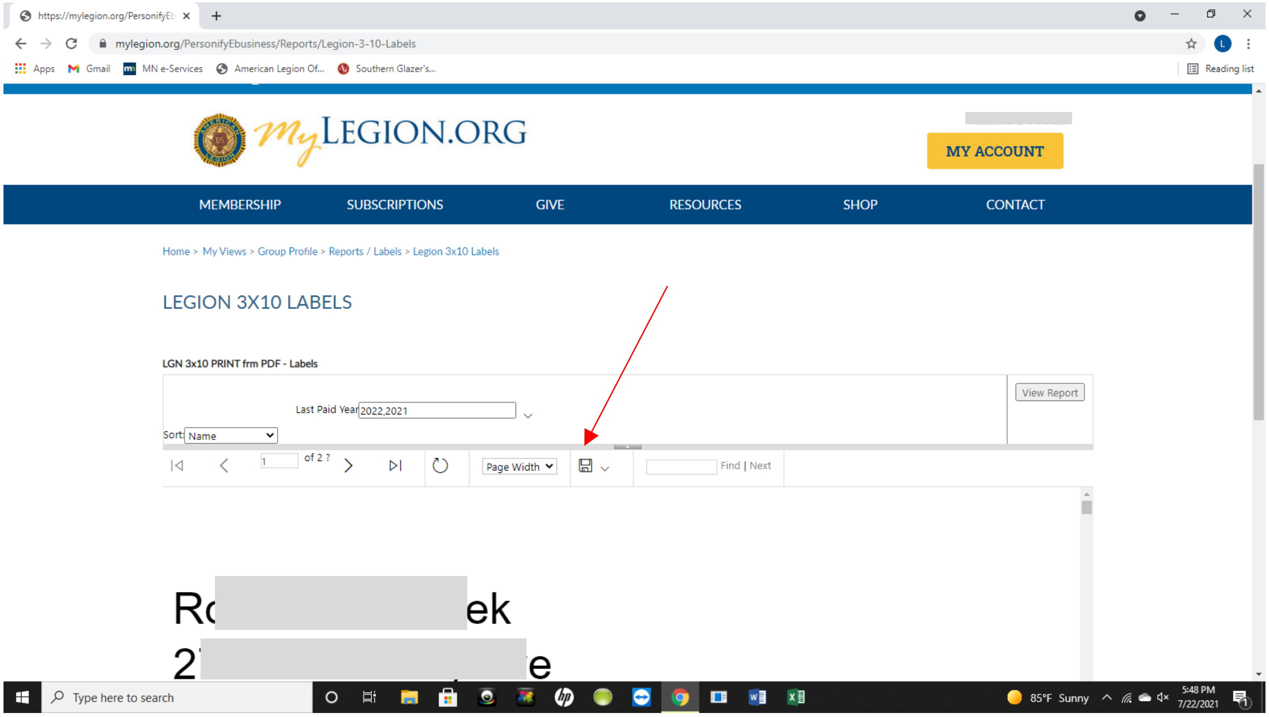
Reports and Labels

From here you can print mailing labels, find members in your area, review the list of members who renewed online and get a current post roster



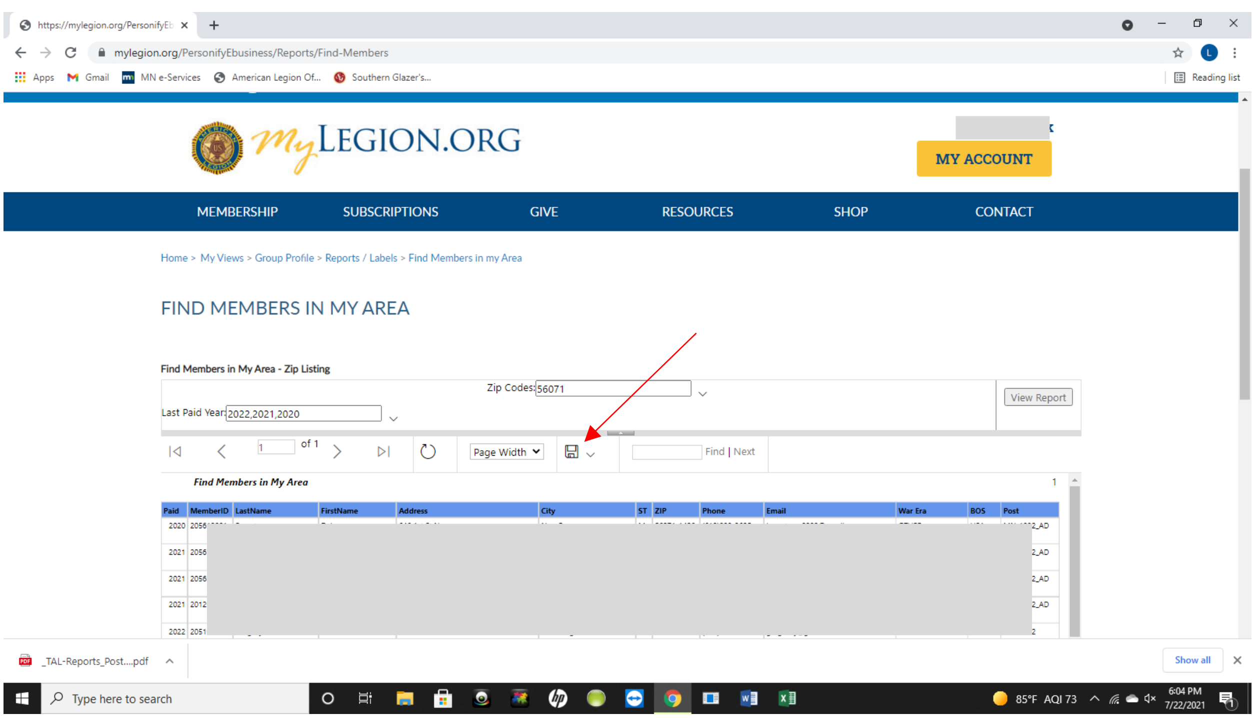
Labels

Labels will be printed on Avery 5160/8160 or equivalent. Select Last year paid, you can select more than one year, then select the way you want the labels sorted (alpha by name or zip code), Select View Report. The names will appear very large on your screen, select the drop down next to the little disc to choose the format you wish the labels to be printed in (I always choose PDF). The labels will be downloaded to your computer.



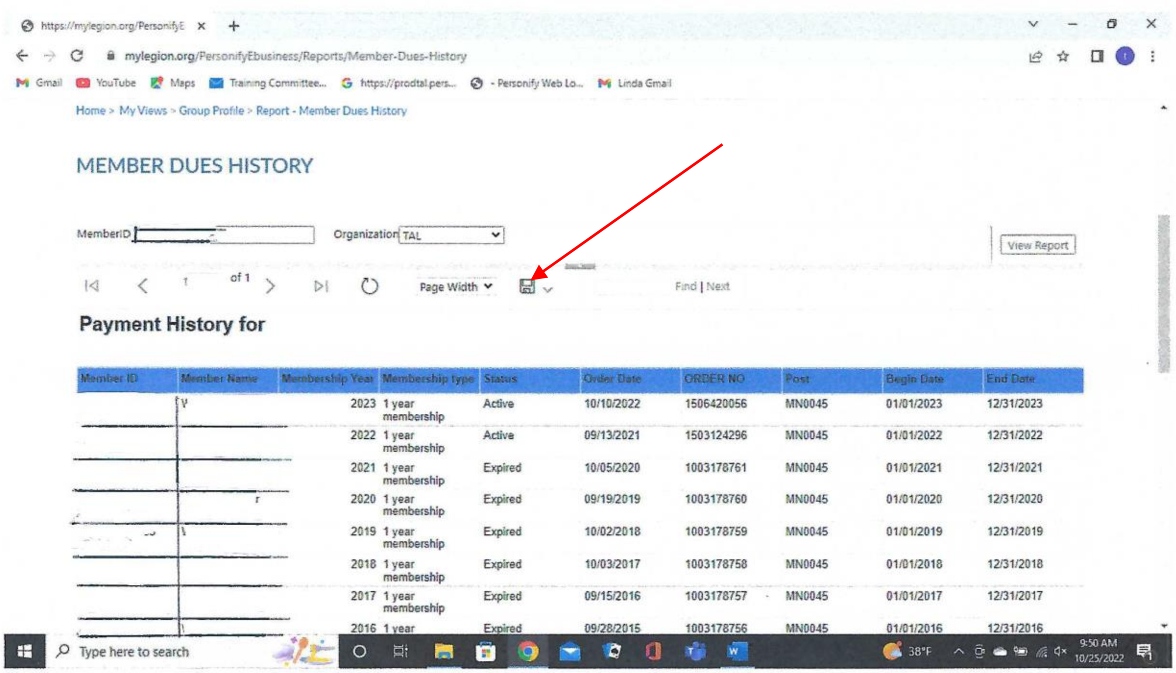
Membership

Find Members in My Area – This will give you a list of all members in 1982AD and 1982MN that live within the specified zip code. These are members the post can try and get to transfer to their post.

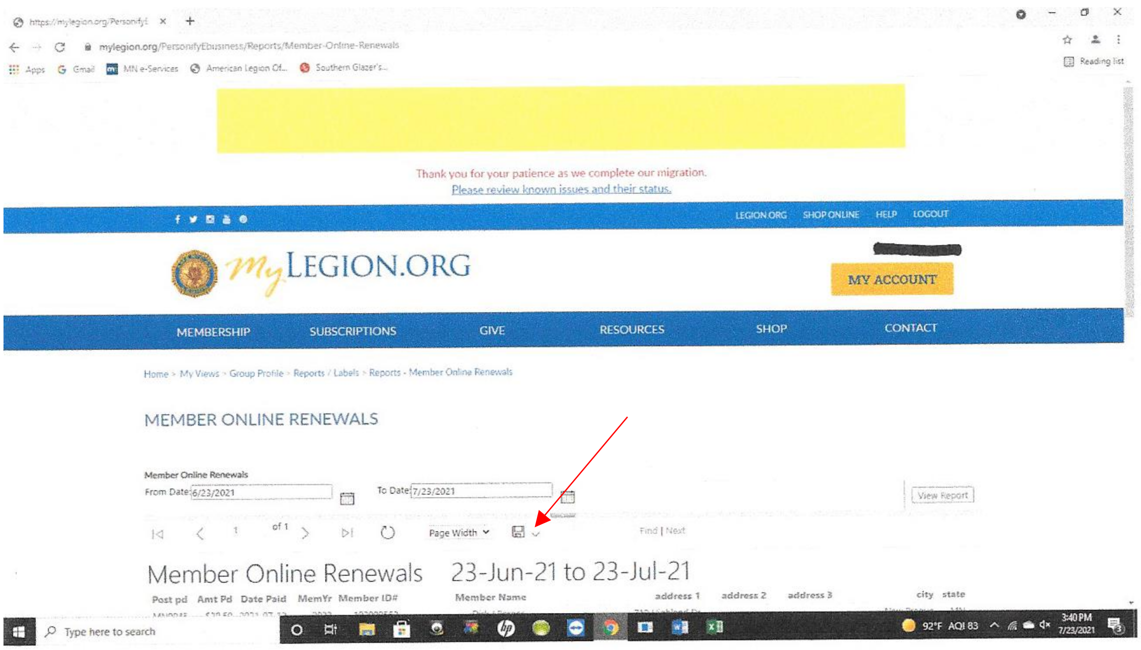


Enter the Zip Code you are interested in (you can select more than one), wait for the data to download (the little circle will stop spinning) select the last year paid and View Report. This report gives you name, address, email, phone number. Contact these members and see if they would like to transfer. To Print the report, Select the little disk and choose the format you wish the report to (I prefer Excel). The report will download to your computer.

Members Dues History – You can view a members payment history for the American Legion or the Sons of the American Legion. Enter the Members ID and which group you want. This report goes back to 2011. To Print the report, Select the little disk and choose the format you wish the report to (I prefer Excel). The report will download to your computer.

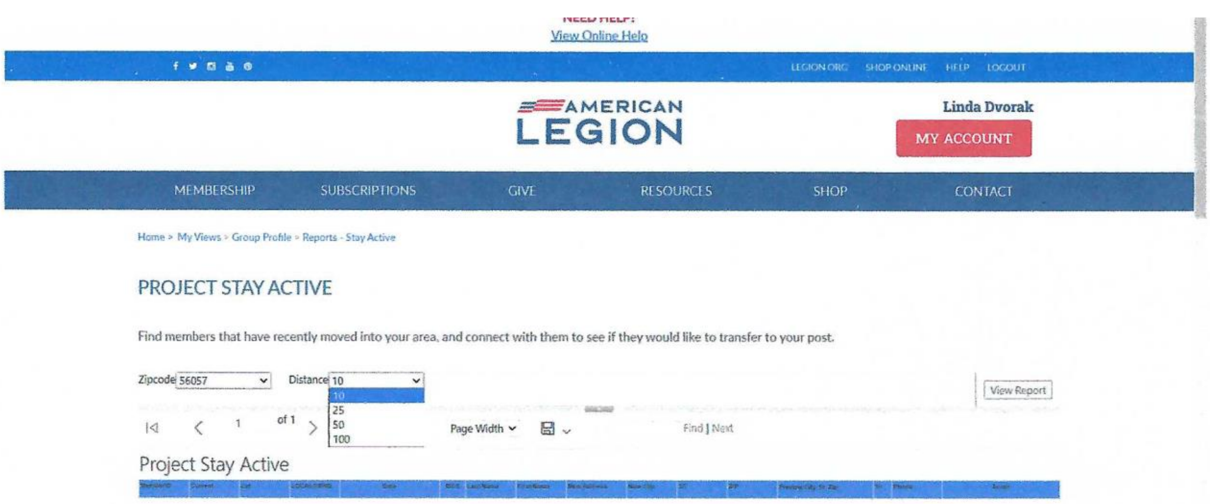


Members Online Renewals – Members that renew online are listed here. You can select the date range; the default is 30 days back from today's date.

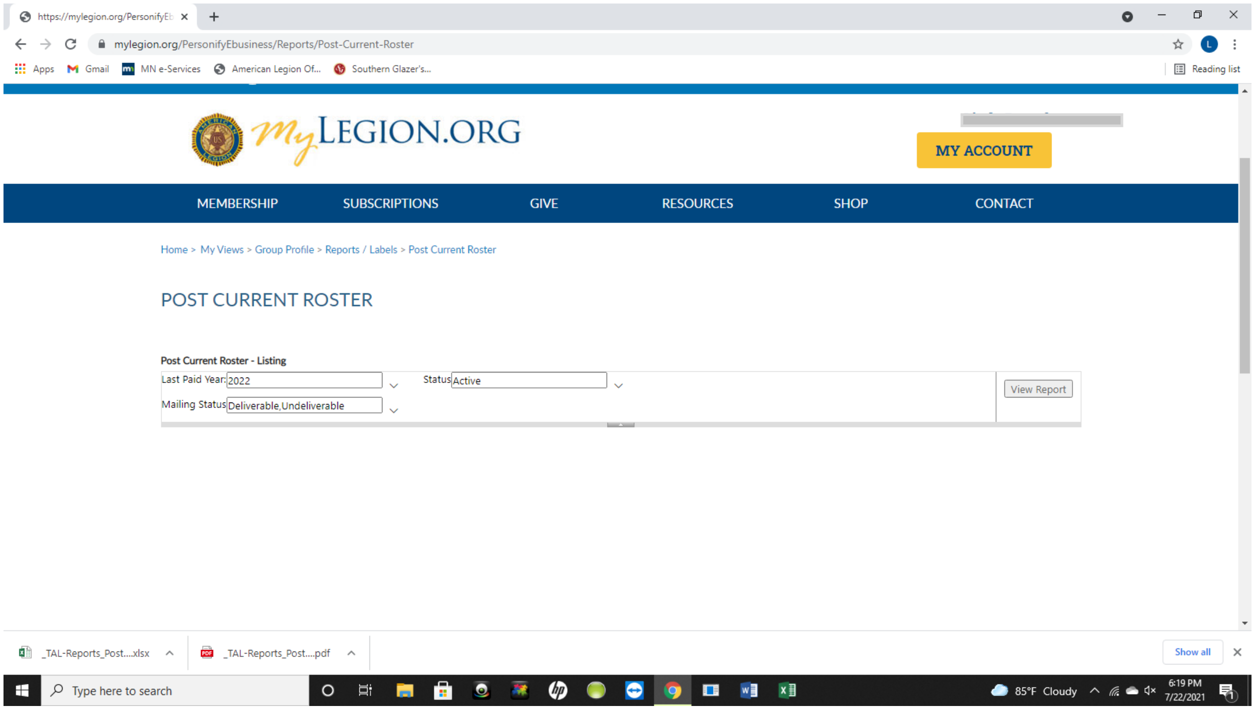


To Print the report, Select the little disk and choose the format you wish the report to (I prefer Excel). The report will download to your computer.

Project Stay Active – This will give you a list of people that have recently moved into the area. You can contact them and see if they would like to transfer to your post. To Print the report, Select the little disk and choose the format you wish the report to (I prefer Excel). The report will download to your computer.



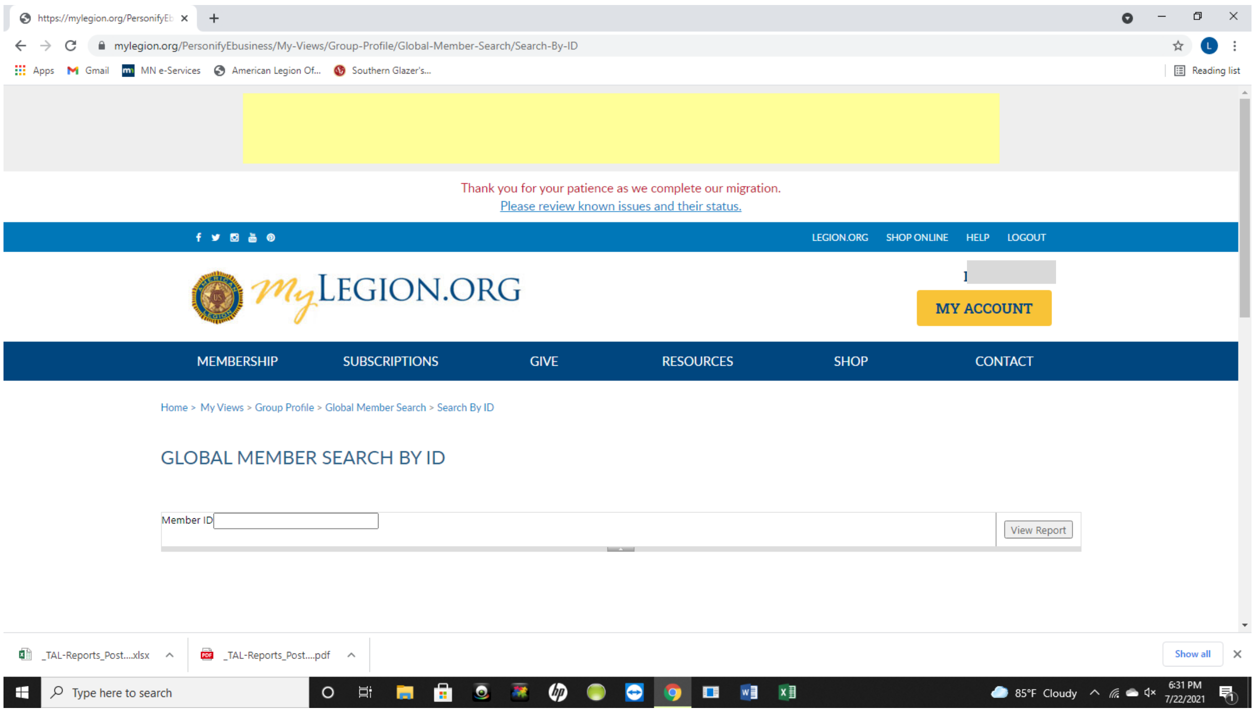
Post Current Roster – This is a roster of the Post Members. Select the last year paid, then the Status (Active or Deceased) and mailing status (deliverable or Undeliverable), then View Report



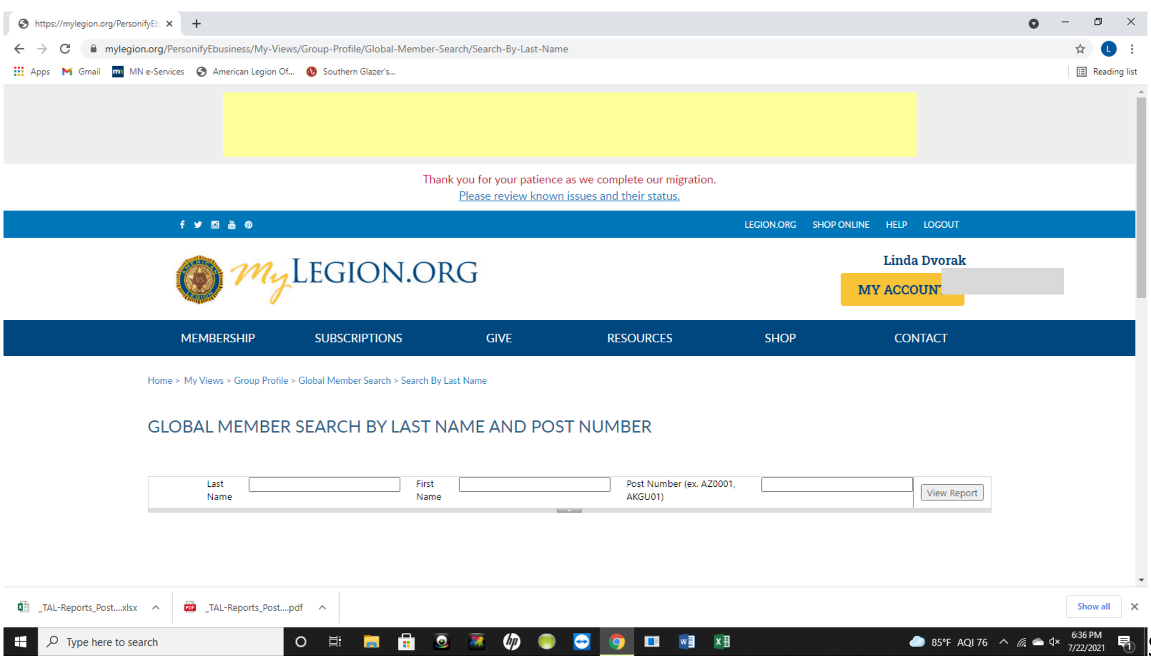
To Print the report, Select the little disk and choose the format you wish the report to (I prefer Excel). The report will download to your computer.

Global Member Search

In this section you are able to find members that are not in your post but wish to transfer to your post. There are two options: Search by Member ID and Search by Name and Post Number.



Search by Member ID- After the ID is entered and you select View Report you will get the individuals Name, Location (Sate/Zip Code) Type of Membership (Individual, PUFL, etc) Last Transaction, Last Year Paid



Search by Last Name and Post Number – You will need Last name and First Name and Post Number (ex

MN0001), select View Report, you will get the individuals Name, Location (Sate/Zip Code) Type of Membership (Individual, PUFL, etc) Last Transaction, Last Year Paid

Group Information

The Group Information is self-explanatory

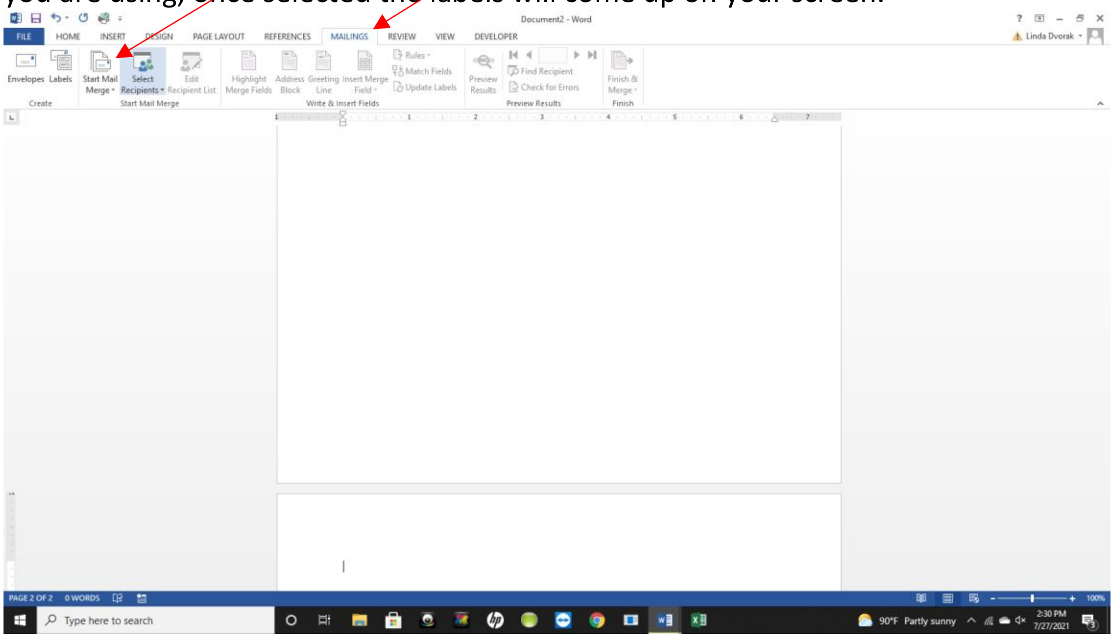
Materials

The Materials area is self-explanatory

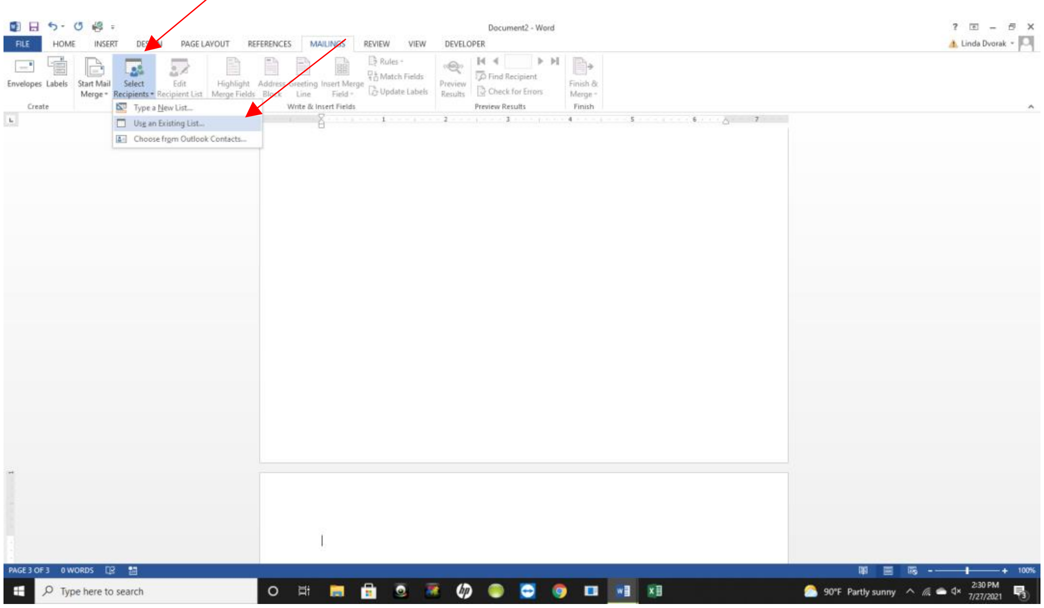
Mail Merge (Labels)

To do a Mail Merge to produce mailing labels you will need a spreadsheet (excel) with the info you want to merge (name, address, City, State & Zip Code). Save the Spreadsheet to a known location.

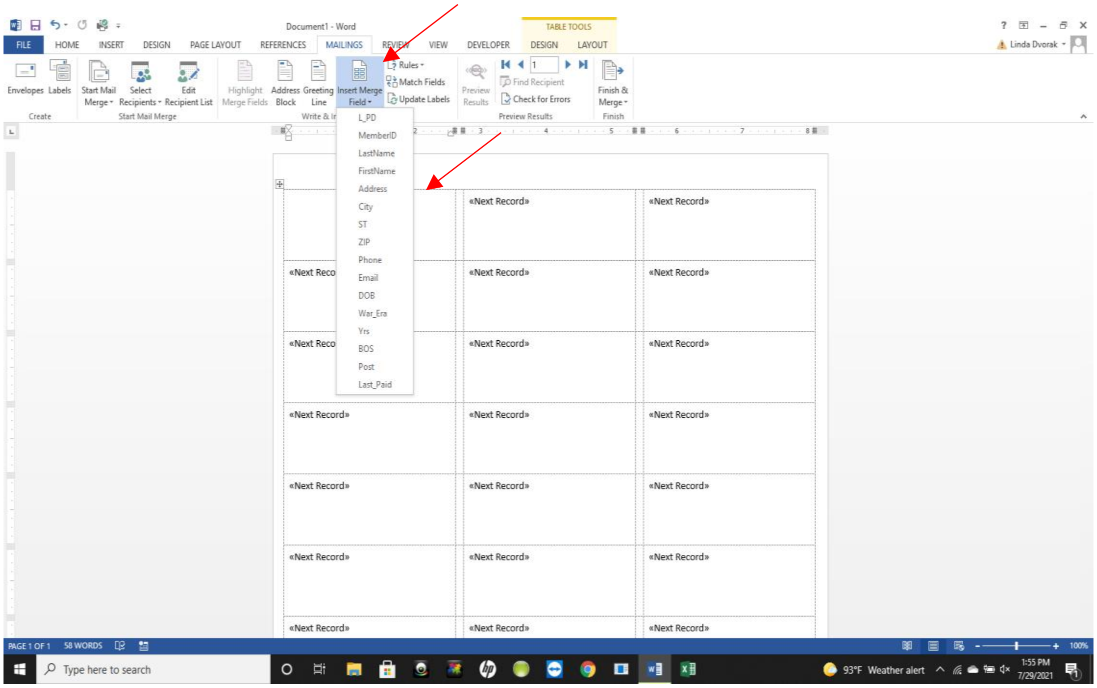
Open a Word document, click on Mailings, Start Mail Merge and select Labels. Select the labels you are using, once selected the labels will come up on your screen.



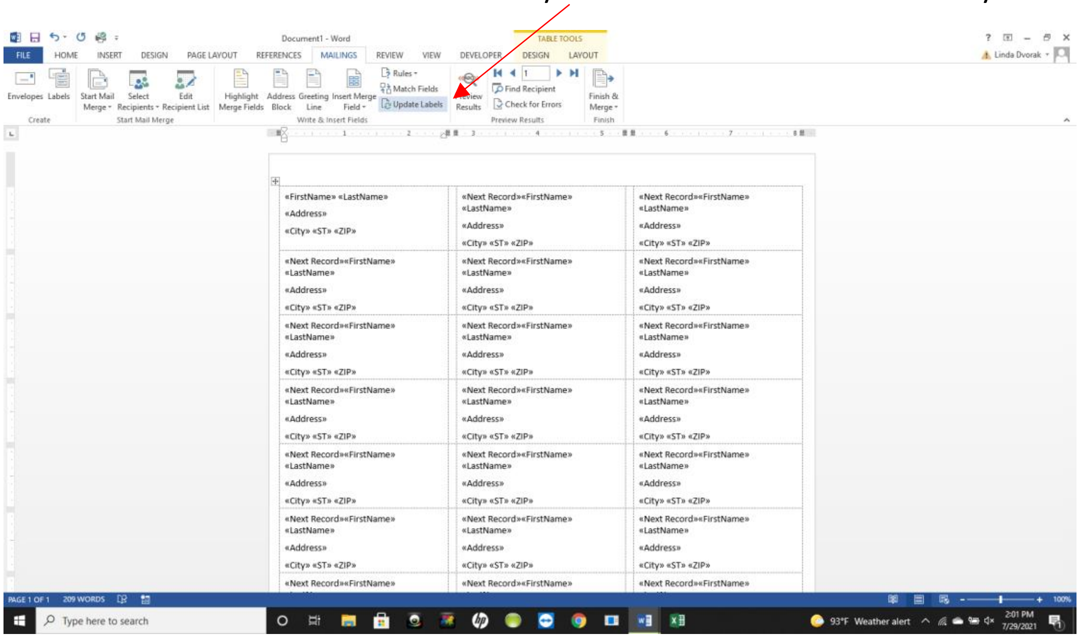
Click on “Select Recipients” then “Use and Existing List” and locate the Excel Spreadsheet with the information you want on the labels. You will get a pop-up window asking what page of the spreadsheet you want to use. If you only have one sheet in your spreadsheet, just click ok. If you have more than one sheet, make sure you select the correct sheet.



Select the “Insert Merge Field”, select the first name on your label and enter a space, select Insert Merge Field again, then the last name and click on the enter button, your curser will go to the second line, select Insert Merge Field again, and add the street address and enter. On the third line you will again select Insert Merge Field and the City, then space, select Insert Merge Field and then State, then again select Insert Merge Field space and lastly the Zip Code.



Once this is complete select “Update Labels” all your labels should populate with the merged info. Select “Preview Results” to see that your labels are formatted correctly.



You can then select “Preview Results” to view the first page to make sure the formatting is correct.

“Finish and Merge” is the last step. Select “Print Documents”, select “all” from the pop-up window. Make sure you have the label loaded in the printer.