

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”

Home > My Account

My Account [My Groups](#) IN Post 0500

MY ACCOUNT

- MY INFORMATION
 - Name & Demographics
 - Military Service
 - Contact Information
 - Addresses
 - Emergency Contacts
 - Communication Preferences
 - Username / Password
- MEMBERSHIP
 - Membership Card
 - Membership Details
 - Member Discounts
 - Committees
- SUBSCRIPTIONS
 - Dispatch
 - E-newsletters
 - Magazine
- PURCHASES
 - Purchase History
 - Pay Open Orders
 - Donation History
 - Saved Credit Cards
- CONTACT INFORMATION
 - National Headquarters
 - Department
 - Post

MY CONTACT INFORMATION

Member Name [Edit](#)

123 Anywhere St

Phone: (xxx) xxx-xxxx [Edit](#)

Email:

[Add](#)

TAL MEMBERSHIP SUMMARY

Status: **Active**

Paid Thru Date: **12/31/2021**

Member Post: **1 Year Membership**
Indiana Post 0500

Member Number: **000101352071**

[View Details](#)

MY SUBSCRIPTIONS

The American Legion Magazine Details
Expires: 4/30/2022
Delivery: Print
Status: Active
The American Legion Magazine Details
Expires: 4/30/2021
Delivery: Print
Status: Active
The American Legion Dispatch Details
Expires: 12/31/2020
Delivery: Print
Status: Active

SAL MEMBERSHIP SUMMARY

There are no memberships to display


MY ORDER BALANCE

Your Account shows no balance due at this time.

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

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

LEGION.ORG SHOP ONLINE LOGOUT

 My LEGION.ORG

Member Name
[REDACTED]

MEMBERSHIP SUBSCRIPTIONS GIVE RESOURCES SHOP CONTACT

Home > My Views > Group Profile > Members

[My Account](#) My Groups IN Post 0500

Details for: IN Post 0500

Last Name: City: Post/Squadron Number:
First Name: State/Province: Member Status:
Email: Country:
Member ID: Paid Through Year:

[Clear](#)

Actions:

Displaying 1-20 of 1411

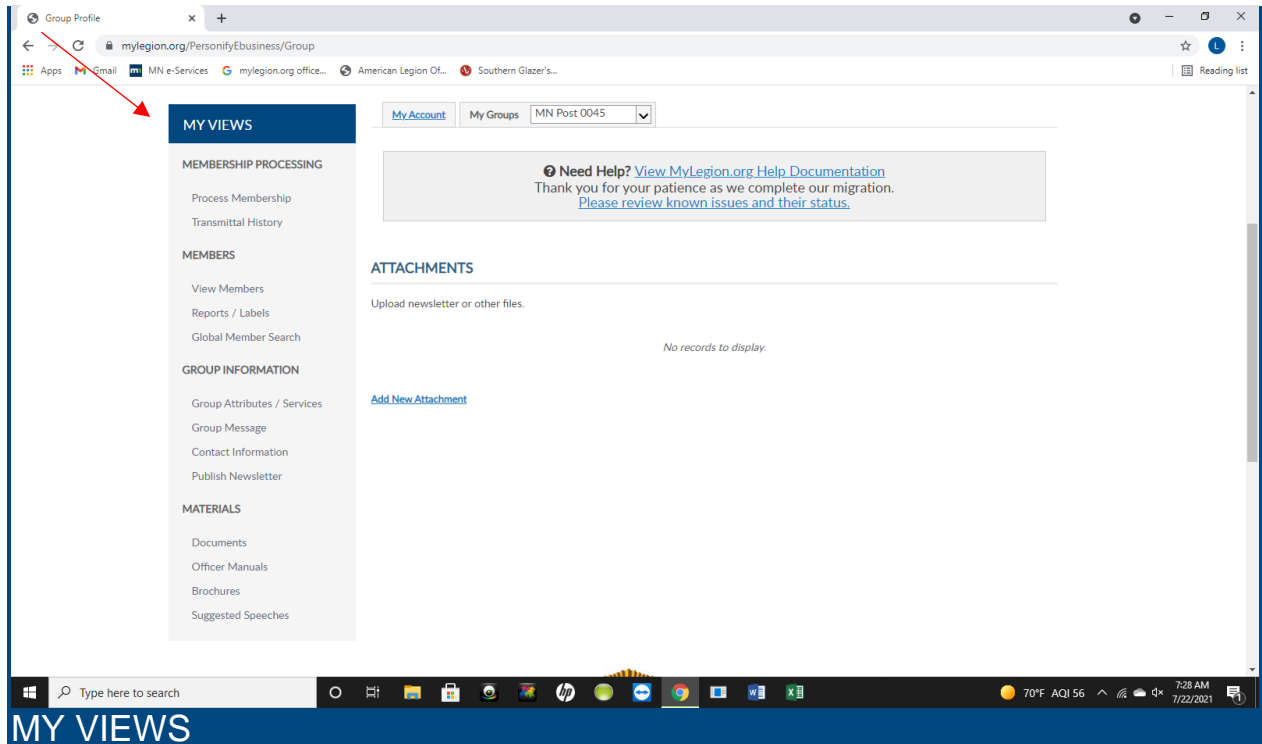
<input type="checkbox"/>	Member ID	Name	Post/Squadron Number	Location	Undeliverable	Contact Information	Branch	Conflict/War Era	Continuous Years	Paid Through Year
<input type="checkbox"/>	000401859538	Aaron, Arthur	American Legion IN Post 0500	1073 E Everton Rd Crownsville, W 47031			USA	OTHER	0	
<input type="checkbox"/>	000									2019
<input type="checkbox"/>	000									2020
<input type="checkbox"/>	000									2021
<input type="checkbox"/>	000101945381	Akers, Donald	American Legion IN Post 0500	8036 W 29th Pl		(317)291-1344		VIETNAM	0	2021

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.

The screenshot shows the MyLEGION.ORG website interface. At the top, there is a navigation bar with links for MEMBERSHIP, SUBSCRIPTIONS, RESOURCES, SHOP, and CONTACT. The user is logged in as a member, with a 'MY ACCOUNT' button visible. The main content area is titled 'My Account' and includes a 'My Groups' dropdown menu. The dropdown menu is open, showing a list of groups: IN Post 0500, IN Post 0500 Leadership, IN Post 0500 Leadership, IN Sqdn 0500, IN Sqdn 0500, IN Squadron 0500 Leadership, IN Squadron 0500 Leadership, and IN Squadron 0500 Leadership. The user's profile information is visible, including a placeholder for a profile picture and the name 'Member 12'. The page also displays a 'MY ORDER BALANCE' section with a message: 'Your Account shows no balance due at this time.' and a 'MY ORDER BALANCE' section with a message: 'There are no memberships to display.'

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



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
 - 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.
 - name and post they belong to.

GROUP INFORMATION

- [Group Attributes / Services](#) – You can select various options your post 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)
 - 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”

The screenshot displays the My Legion.org website interface for membership processing. At the top, there is a navigation bar with links for LEGION.ORG, SHOP ONLINE, and LOGOUT. Below this is the My Legion.org logo and a 'Member Name' field with a 'MY ACCOUNT' button. A secondary navigation bar contains links for MEMBERSHIP, SUBSCRIPTIONS, GIVE, RESOURCES, SHOP, and CONTACT. The main content area shows a breadcrumb trail: Home > My Views > Group Profile > Members. Below this is a search bar with 'My Account', 'My Groups', and a dropdown for 'IN Post 0500'. A section titled 'Details for: IN Post 0500' contains a search form with fields for Last Name, First Name, Email, Member ID, City, State/Province, Country, Paid Through Year, Post/Squadron Number, and Member Status. A 'Search' button and a 'Clear' link are provided. Below the search form is an 'Actions' section with a dropdown for 'Export Full Roster' and a 'Go' button. On the right side, there is a prominent blue button labeled 'Add/Modify Transmittal', which is highlighted with a red arrow. Below the actions is a table displaying a list of members. The table has columns for Member ID, Name, Post/Squadron Number, Location, Undeliverable, Contact Information, Branch, Conflict/War Era, Continuous Years, and Paid Through Year. The first row shows a member with ID 000401859538, Name Aaron, Arthur, Post/Squadron Number American Legion IN, Location 1073 E Everton Rd, Branch USA, Conflict/War Era OTHER, Continuous Years 0, and Paid Through Year 2019. The second row shows a member with ID 000201859538, Name Akers, Donald, Post/Squadron Number American Legion IN, Location 8038 W 29th Pl, Contact Information (317)291-1344, Branch IN, Conflict/War Era VIETNAM, Continuous Years 0, and Paid Through Year 2021. The table is paginated, showing 1-20 of 1411 members.

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. **As a reminder**, 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.

Home > Membership > Post Transmittal

My Account | My Groups | In Post 0510

POST TRANSMITTAL

Status :	OPEN	Per Capitas	Actual
Card Count :			1
National :		\$18.50	\$18.50
Department :		\$16.50	\$16.50
Post :		\$5.00	\$5.00
Total amount due today :			\$35.00

Member First Name Member Last Name

Member Id

Search Clear All

Add New Member **Transfer Member** [List Selected](#) [Export to CSV](#) [Print](#)

Select	Member Id	Member Name	Email Address	Phone	Address	Renewal Year
<input checked="" type="checkbox"/>	000204280880	Ann B Adcock	annadcock@yahoo.com	(317)696-7883	7025 Keston Cir Indianapolis, IN 46256-2322	2020
<input type="checkbox"/>	000205519581	Richard S Adcock	rsadcock@yahoo.com	(317)697-4495	7025 Keston Cir Indianapolis, IN 46256-2322	2020
<input type="checkbox"/>	000204946672	Michelle Adcock	adcockmichelle@gmail.com	(317)723-7646	3325 Keston Cir Indianapolis, IN 46235-6007	2020
<input type="checkbox"/>	000204946673	Richard Adcock	rsadcock@yahoo.com	(317)723-7646	3325 Keston Cir Indianapolis, IN 46235-6007	2020
<input type="checkbox"/>	000204946674	Michelle Adcock	adcockmichelle@gmail.com	(317)723-7646	3325 Keston Cir Indianapolis, IN 46235-6007	2020
<input type="checkbox"/>	000204946675	Richard Adcock	rsadcock@yahoo.com	(317)723-7646	3325 Keston Cir Indianapolis, IN 46235-6007	2020
<input type="checkbox"/>	000204946676	Michelle Adcock	adcockmichelle@gmail.com	(317)723-7646	3325 Keston Cir Indianapolis, IN 46235-6007	2020

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.

- New member- 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”.

Home > Membership > AddMember

** Required*

* First Name:

Middle Initial:

* Last Name:

Suffix: ▼

Date of Birth: ▼ ▼ ▼

Gender: ▼

* Country: United States [Change](#)

* Address Type: ▼

* Address Line 1:

Address Line 2:

Address Line 3:

* City:

* State: ▼

* Zip Code:

Phone: EXT

Email:

* Branch of Service: ▼

* Conflict: ▼

[Cancel](#)

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

Home > Membership > TransferMember

Transfer-in Existing Member

* Member ID:

* Last Name:

[Cancel](#)

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

Transfer-in Existing Member

* Required

First Name:	First Name
Middle Initial:	Last Name
Last Name:	runez
Suffix:	
Date of Birth:	Month <input type="text"/> Day <input type="text"/> Year <input type="text"/>
Gender:	Male <input type="text"/>
* Country:	United States Change
* Address Type:	Home <input type="text"/>
Member Address Info	
* Address Line 1:	7238 N 650 W
Address Line 2:	<input type="text"/>
Address Line 3:	<input type="text"/>
* City:	Fairland
* State:	Indiana <input type="text"/>
* Zip Code:	46126
Phone:	() <input type="text"/> - <input type="text"/> EXT <input type="text"/>
Email:	<input type="text"/>
* Branch of Service:	Select <input type="text"/>
* Conflict:	PERSIAN_GULF <input type="text"/>

[Cancel](#)

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

POST TRANSMITTAL

Status :	Per Capitas	Actual
Not Saved		
Card Count :		1
National :	\$18.50	\$18.50
Department :	\$13.75	\$13.75
Post :	\$3.25	\$3.25
Total amount due today :		\$35.25

Please Confirm selected members, and click 'Finalize'

Member Id	Member Name	Email Address	Phone	Address	Renewal Year
					2022

Finalize Cancel

THE AMERICAN LEGION

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. You will not be able to process any additional membership until this transmittal has gone totally through the system.

Total Selected To Pay: \$35.25

PAYMENT INFORMATION

Select a Saved Bank Account

Add new eCheck

* Required

* Bank Routing Number: What's this

* Re-enter Bank Routing Number:

* Bank Account Number: What's this

* Re-enter Bank Account Number:

* Account Type:

* Account Holders Full Name:

eCheck Billing Address

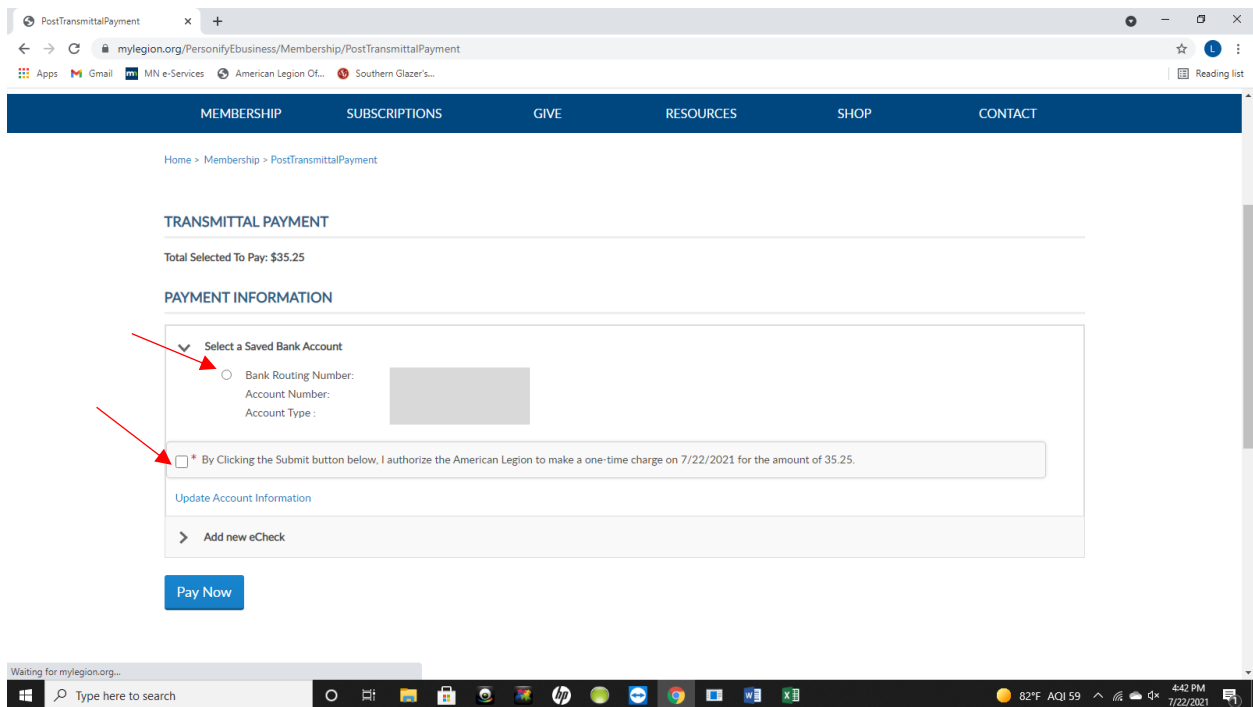
300 Lexi
New Pra
2426, US

By Clicking the Submit button below, I authorize the American Legion to make a one-time charge on 7/22/2021 for the amount of 35.25.

Pay Now

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]

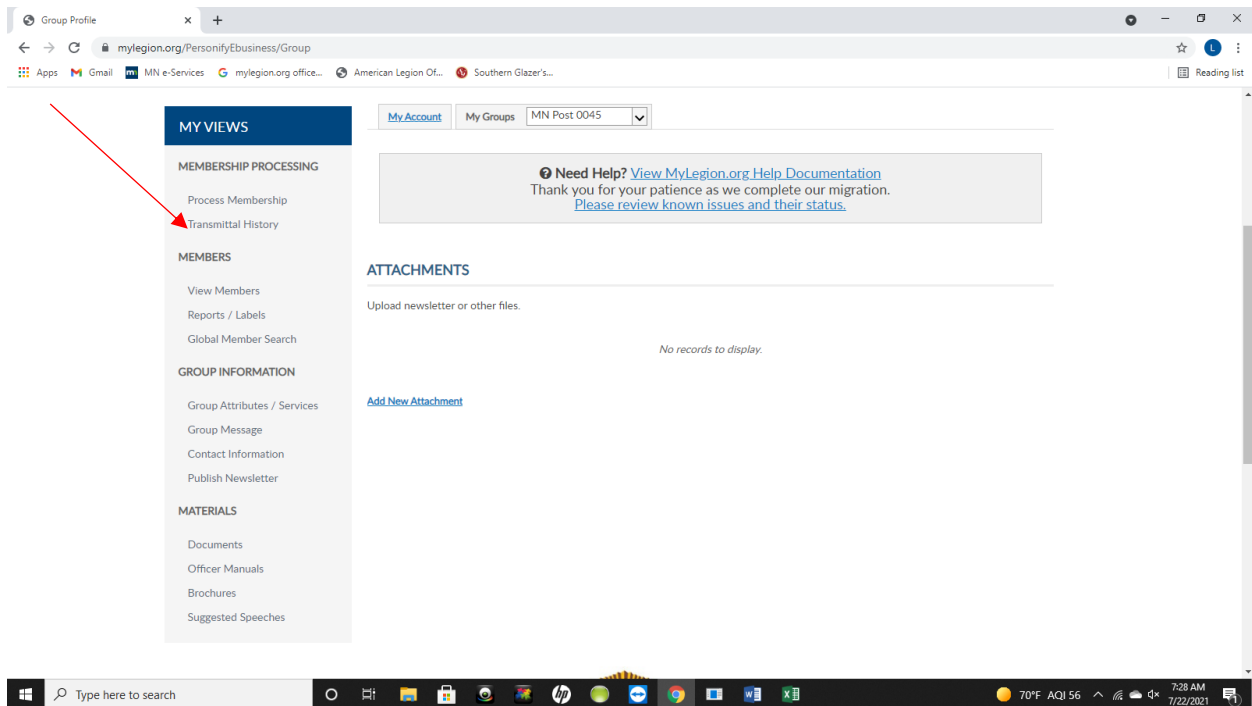
Cards: 1
Total Amount: \$35.25
Status: Posted
Charge per member: \$35.25
Date Submitted: 07/07/2021
Invoice #: 2107010137

Members in this Batch

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

Transmittal History

To look up a transmittal, select Transmittal History



The screenshot shows a web browser window at mylegion.org. The left sidebar contains a 'MY VIEWS' menu with categories: MEMBERSHIP PROCESSING (Process Membership, Transmittal History), MEMBERS (View Members, Reports / Labels, Global Member Search), GROUP INFORMATION (Group Attributes / Services, Group Message, Contact Information, Publish Newsletter), and MATERIALS (Documents, Officer Manuals, Brochures, Suggested Speeches). A red arrow points to 'Transmittal History' in the MEMBERSHIP PROCESSING section. The main content area shows a message about migration and an 'ATTACHMENTS' section with 'No records to display'.

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

Transmittal History

mylegion.org/PersonifyEbusiness/Membership/Transmittal-History

MY ACCOUNT

MEMBERSHIP SUBSCRIPTIONS GIVE RESOURCES SHOP CONTACT

Home > Membership > Transmittal History

My Account My Groups MN Post 0045

Year Type Range From Date To Date

Search Clear

Transmittal Number	Membership Year	Transmittal Submitted	Transmittal Type	Processed Date	Stated # of Members	Stated Dollar Amount	Actual # of Members	Actual Dollar Amount
2104130070	2021	4/13/2021	Online	2021-04-29	0	\$0.00	1	\$35.25
2107010137	2021	7/1/2021		2021-07-07	0	\$0.00	1	\$35.25

12:44 PM 7/14/2021

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

Group Profile

mylegion.org/PersonifyEbusiness/Group

MY VIEWS

MEMBERSHIP PROCESSING

Process Membership

Transmittal History

MEMBERS

View Members

Reports / Labels

Global Member Search

GROUP INFORMATION

Group Attributes / Services

Group Message

Contact Information

Publish Newsletter

MATERIALS

Documents

Officer Manuals

Brochures

Suggested Speeches

My Account My Groups MN Post 0045

Need Help? View MyLegion.org Help Documentation

Thank you for your patience as we complete our migration. Please review known issues and their status.

ATTACHMENTS

Upload newsletter or other files.

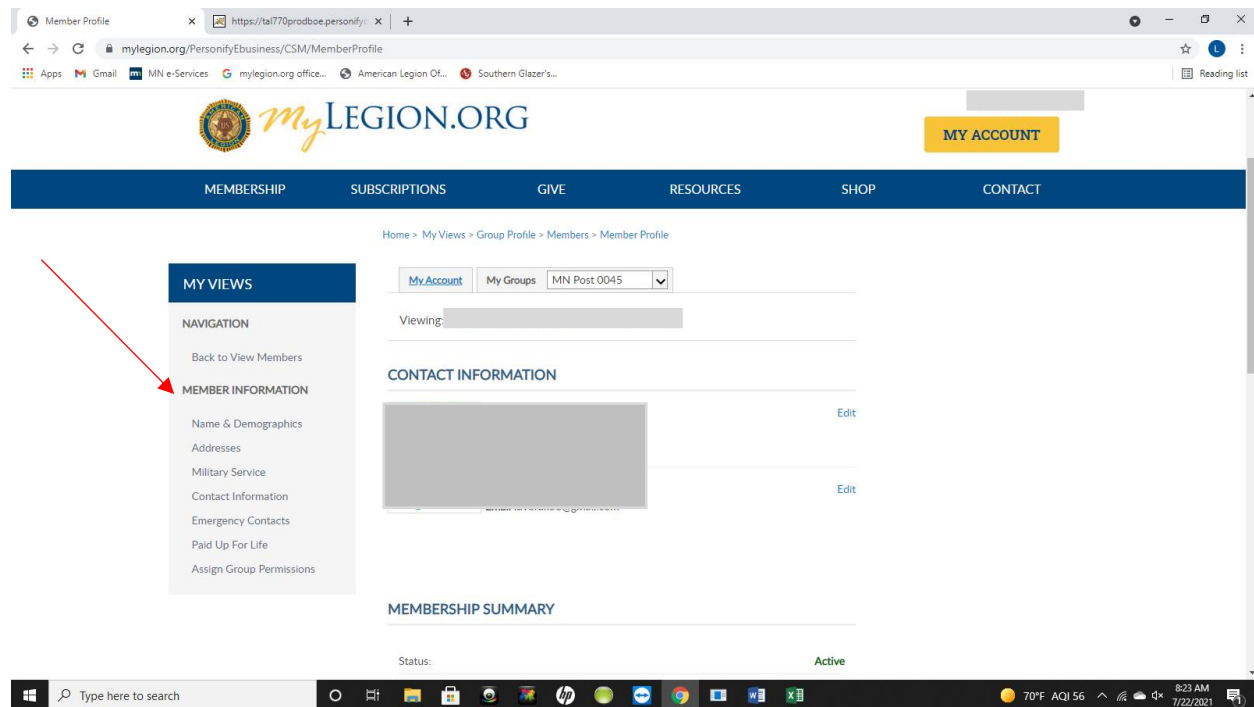
No records to display.

Add New Attachment

7:28 AM 7/22/2021

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

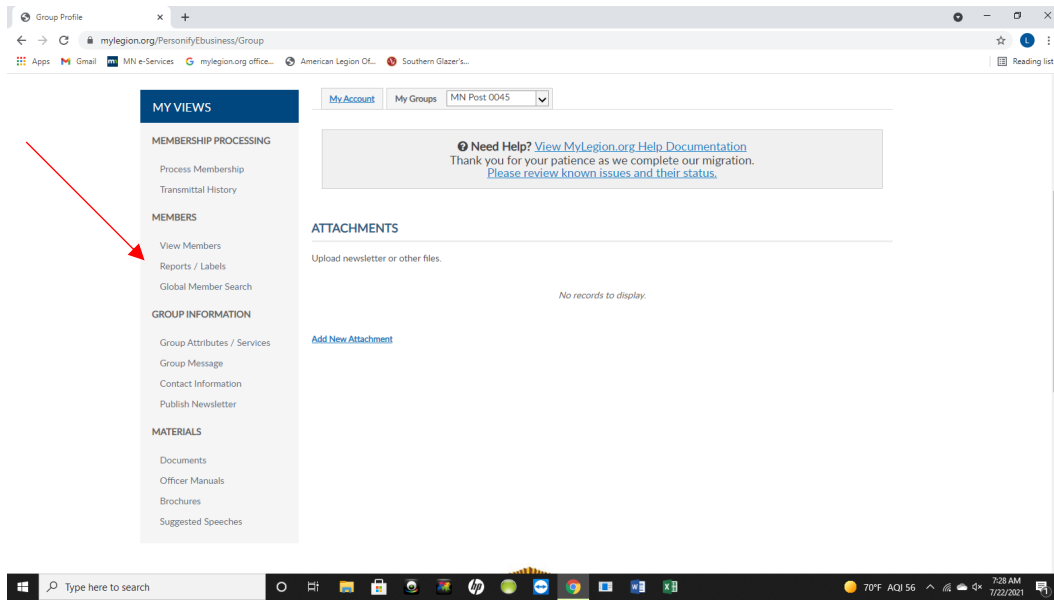
Committees – This lists all Past and Present Committees and Positions at the Post, District, Department or National level.

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.

https://mylegion.org/PersonifyEi: x +

mylegion.org/PersonifyEbusiness/Reports/Legion-3-10-Labels

My LEGION.ORG

MEMBERSHIP SUBSCRIPTIONS GIVE RESOURCES SHOP CONTACT

Home > My Views > Group Profile > Reports / Labels > Legion 3x10 Labels

LEGION 3X10 LABELS

LGN 3x10 PRINT frm PDF - Labels

Last Paid Year: 2022,2021

Sort: Name

1 of 2 ?

Page Width

Print

Find | Next

View Report

Redacted text: Re [redacted] ek
2 [redacted] e

Windows taskbar: 85°F Sunny 5:48 PM 7/22/2021

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.

https://mylegion.org/PersonifyEi: x +

mylegion.org/PersonifyEbusiness/Reports/Find-Members

My LEGION.ORG

MEMBERSHIP SUBSCRIPTIONS GIVE RESOURCES SHOP CONTACT

Home > My Views > Group Profile > Reports / Labels > Find Members in my Area

FIND MEMBERS IN MY AREA

Find Members in My Area - Zip Listing

Zip Codes: 56071

Last Paid Year: 2022,2021,2020

1 of 1

Page Width

Print

Find | Next

View Report

Find Members in My Area

Paid	MemberID	LastName	FirstName	Address	City	ST	ZIP	Phone	Email	War Era	BOS	Post
2020	2056	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	2_AD
2021	2056	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	2_AD
2021	2056	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	2_AD
2021	2012	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	2_AD
2022	2051	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	2

Windows taskbar: 85°F AQI 73 6:04 PM 7/22/2021

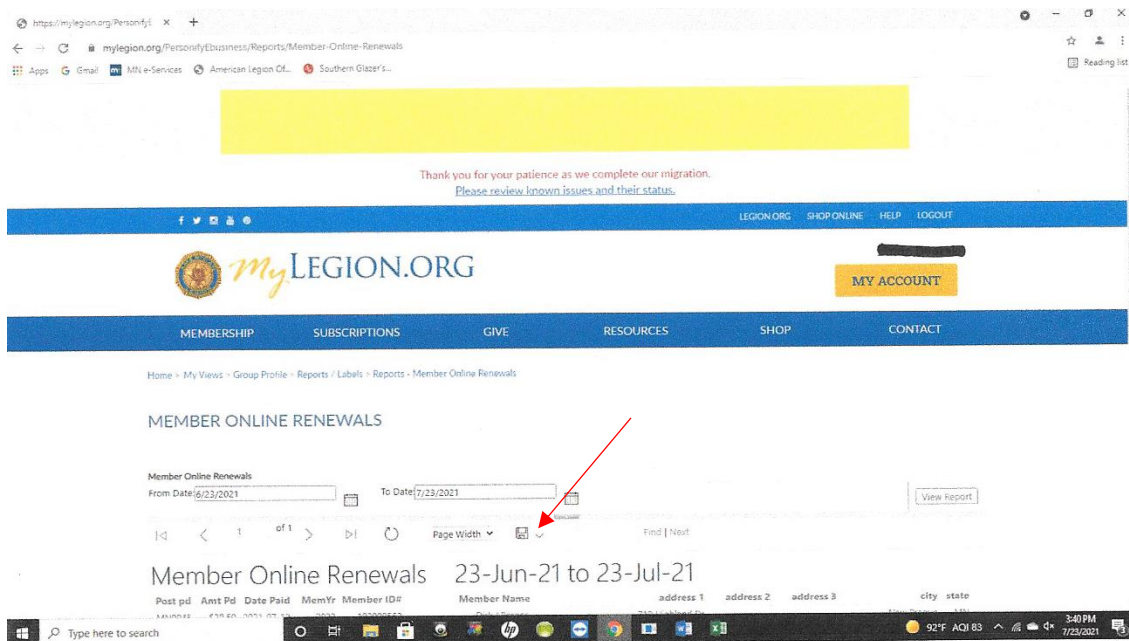
Enter the Zip Code you are interested in (you can select more than one), wait for the data to download (the little circle will stop spinning) select the last year paid and View Report. This report gives you name, address, email, phone number. Contact these members and see if they would like to transfer. 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.

The screenshot displays the 'MEMBER DUES HISTORY' page on mylegion.org. It includes a search form with 'MemberID' and 'Organization' (set to 'TAL') fields, and a 'View Report' button. Below the form is a navigation bar with a print icon highlighted by a red arrow. The main content is a table titled 'Payment History for' with the following data:

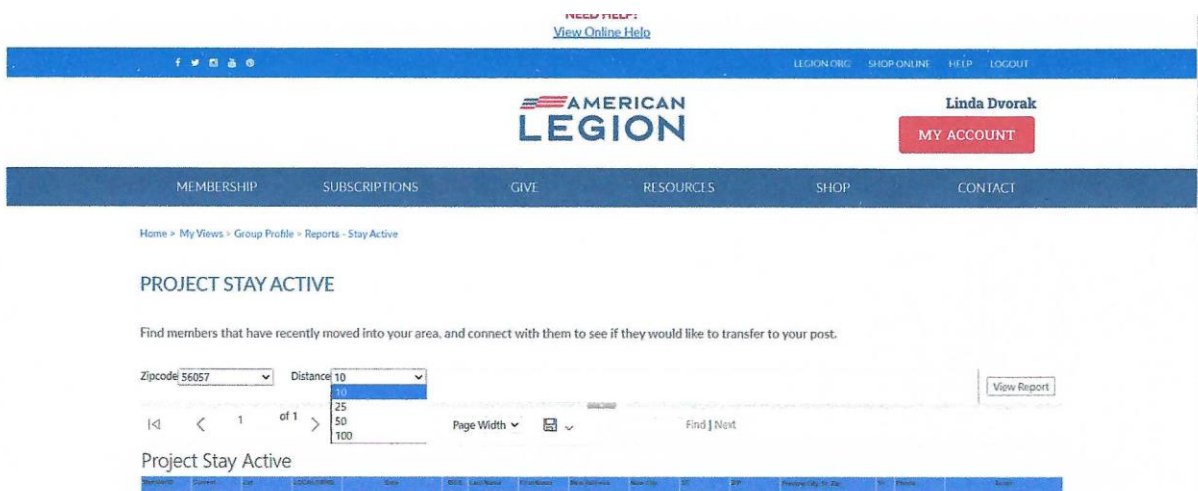
Member ID	Member Name	Membership Year	Membership type	Status	Order Date	ORDER NO	Post	Begin Date	End Date
	V	2023	1 year membership	Active	10/10/2022	1506420056	MN0045	01/01/2023	12/31/2023
		2022	1 year membership	Active	09/13/2021	1503124296	MN0045	01/01/2022	12/31/2022
		2021	1 year membership	Expired	10/05/2020	1003178761	MN0045	01/01/2021	12/31/2021
	T	2020	1 year membership	Expired	09/19/2019	1003178760	MN0045	01/01/2020	12/31/2020
		2019	1 year membership	Expired	10/02/2018	1003178759	MN0045	01/01/2019	12/31/2019
		2018	1 year membership	Expired	10/03/2017	1003178758	MN0045	01/01/2018	12/31/2018
		2017	1 year membership	Expired	09/15/2016	1003178757	MN0045	01/01/2017	12/31/2017
		2016	1 year	Expired	09/28/2015	1003178756	MN0045	01/01/2016	12/31/2016

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.



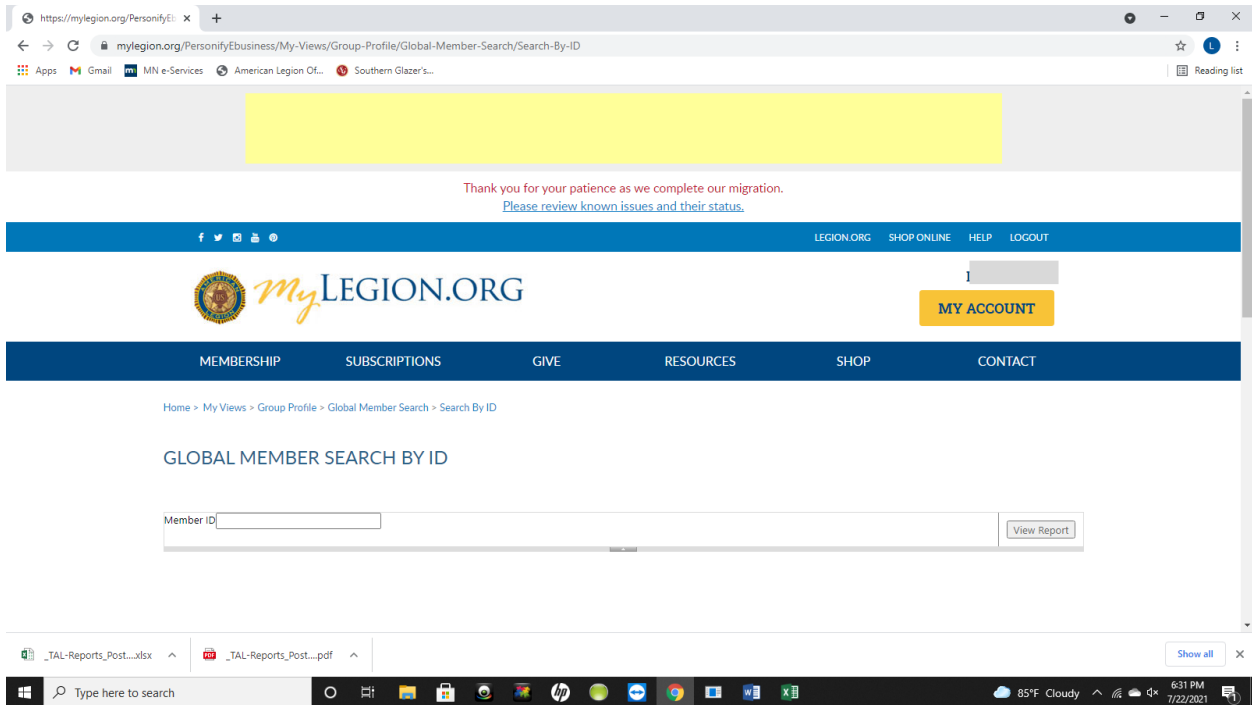
Post Current Roster – This is a roster of the Post Members. Select the last year paid, then the Status (Active or Deceased) and mailing status (deliverable or Undeliverable), then View Report

The screenshot shows a web browser window with the URL <https://mylegion.org/PersonifyE/PersonifyEbusiness/Reports/Post-Current-Roster>. The page header includes the My Legion.org logo and a "MY ACCOUNT" button. A navigation bar contains links for MEMBERSHIP, SUBSCRIPTIONS, GIVE, RESOURCES, SHOP, and CONTACT. The breadcrumb trail reads: Home > My Views > Group Profile > Reports / Labels > Post Current Roster. The main heading is "POST CURRENT ROSTER". Below it, a form titled "Post Current Roster - Listing" contains three dropdown menus: "Last Paid Year" (set to 2022), "Status" (set to Active), and "Mailing Status" (set to Deliverable, Undeliverable). A "View Report" button is positioned to the right of the dropdowns. The browser's taskbar at the bottom shows two open files: "_TAL-Reports_Post....xlsx" and "_TAL-Reports_Post....pdf". The system tray on the right indicates a temperature of 85°F, Cloudy weather, and the time 6:19 PM on 7/22/2021.

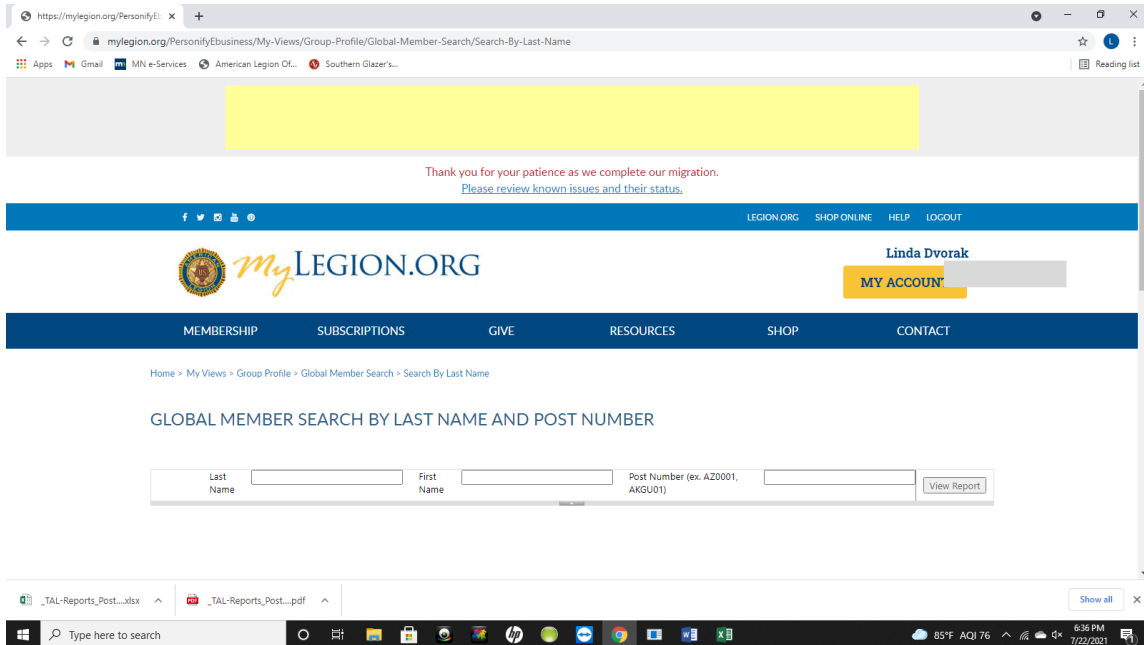
To Print the report, Select the little disk and choose the format you wish the report to (I prefer Excel). The report will download to your computer.

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 (State/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 (State/Zip Code) Type of Membership (Individual, PUFL, etc) Last Transaction, Last Year Paid

Group Information

The Group Information is self-explanatory

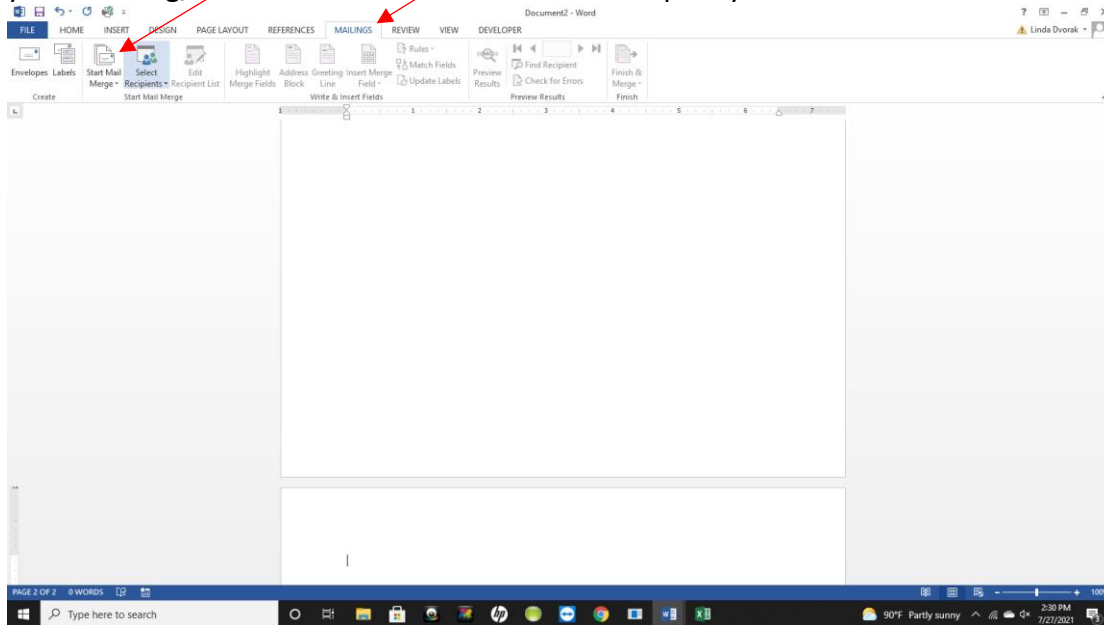
Materials

The Materials area is self-explanatory

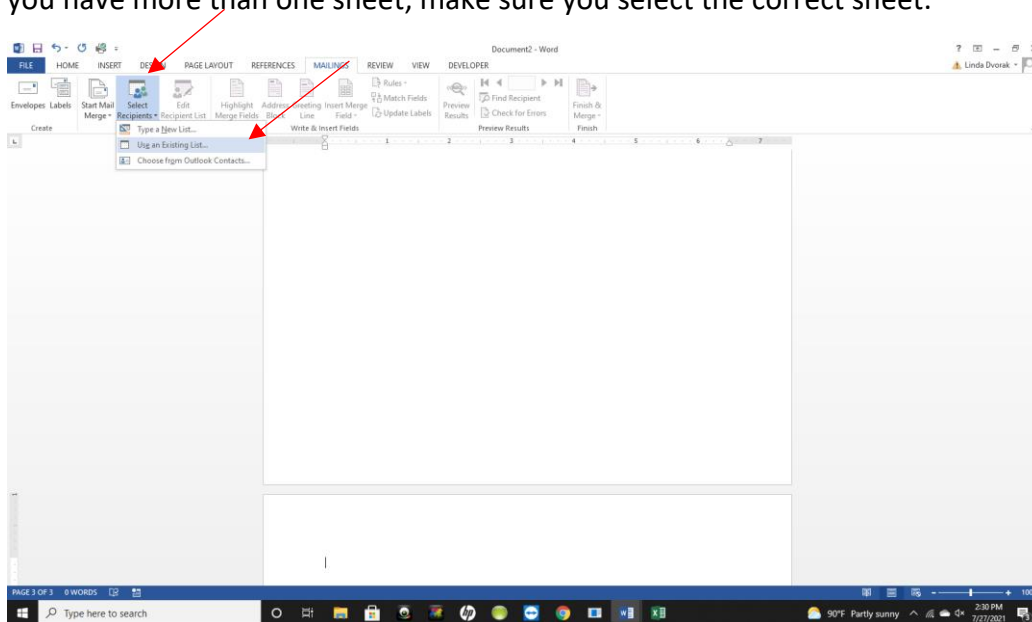
Mail Merge (Labels)

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.

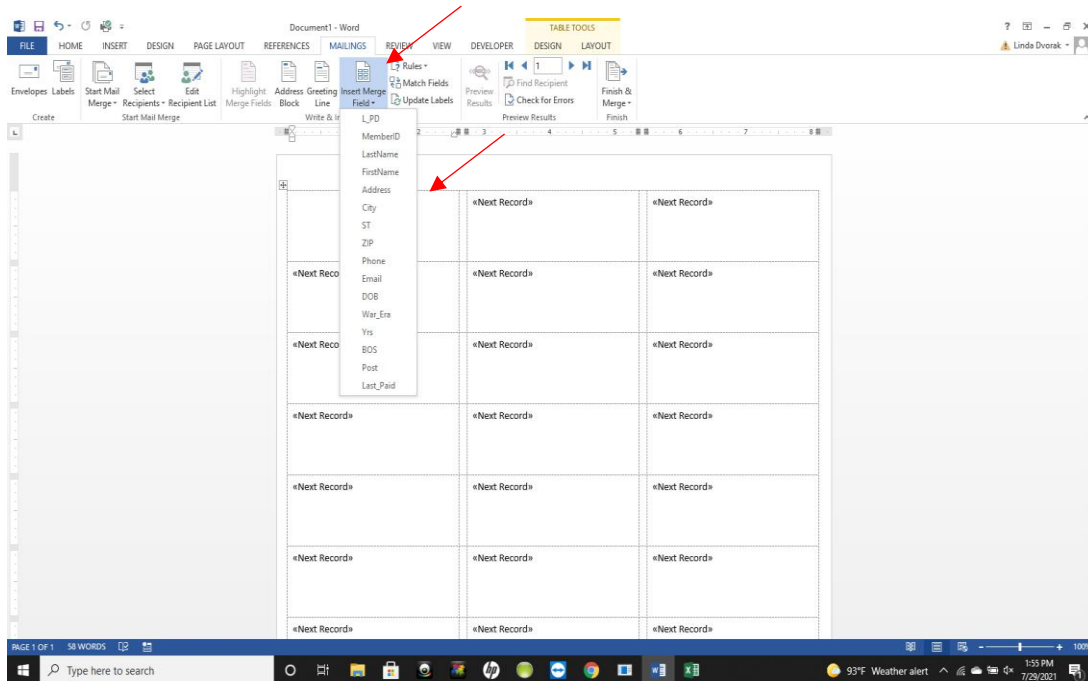
Open a Word document, click on Mailings, Start Mail Merge and select Labels. Select the labels you are using, once selected the labels will come up on your screen.



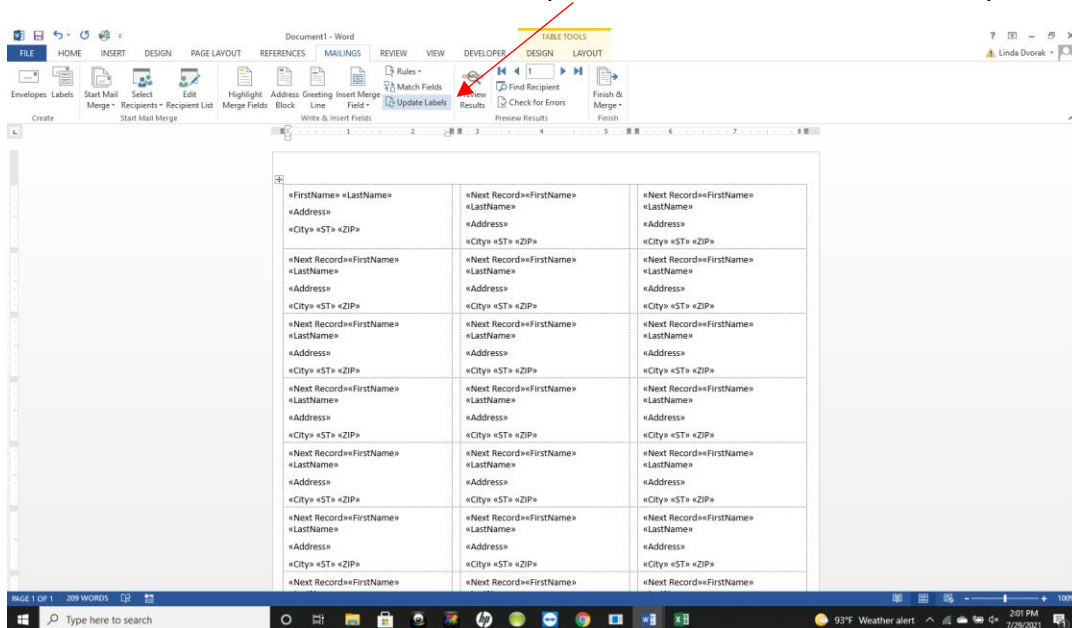
Click on “Select Recipients” then “Use and Existing List” and locate the Excel Spreadsheet with the information you want on the labels. You will get a pop-up window asking what page of the spreadsheet you want to use. If you only have one sheet in your spreadsheet, just click ok. If you have more than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

