



Membership Website – Branch Processing Guide

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Command**

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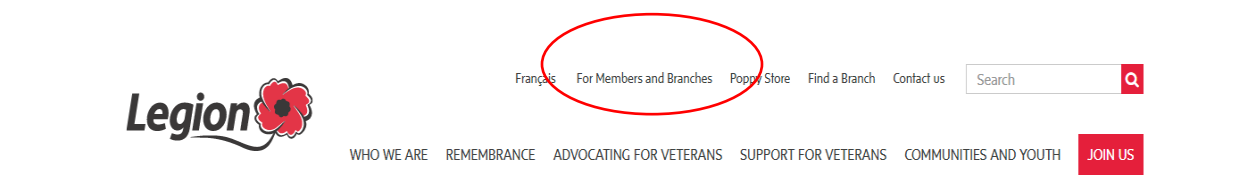
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Internet Service Recommendations

Basic Internet service is required and Internet browsers (Internet Explorer, Firefox, Chrome, etc.) browsers should be up to date with updates from their providers.

How to Login to your Branch

Go to www.Legion.ca



Click on For Members and Branches on the top navigation menu



Enter the username and password supplied to your branch.

If you have not received your username and password, contact Dominion Command.

Username or Membership Number

Password

☒ Remember me on this computer

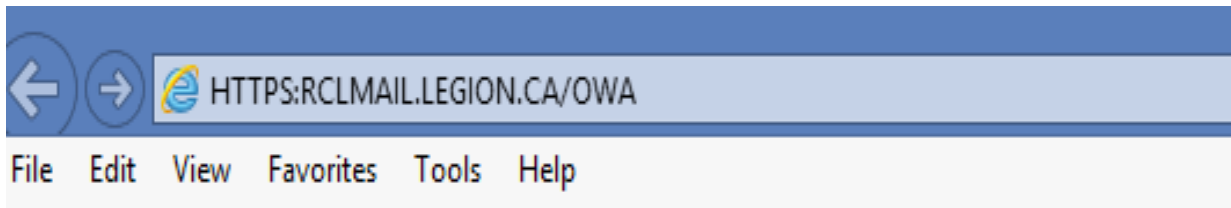
[Forgot your password?](#)

Select Login

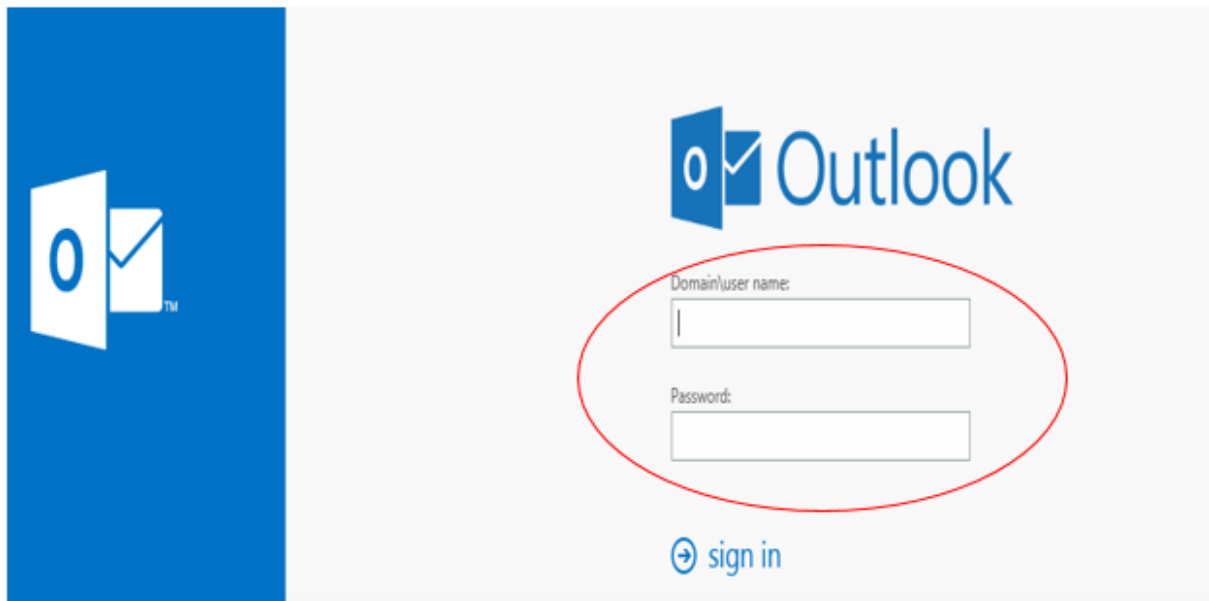
Accessing Your New Legion.ca Email

To access your new legion.ca email select the link below.

<HTTPS://RCLMAIL.LEGION.CA/OWA>



Enter your username and password supplied by Dominion Command and select sign in



All branches have a legion.ca email. This email is set up to receive; password reset requests, updates to membership profiles, online renewals and more. Please check your email regularly for updates.

Forgot Your Password?

Email received in your branch legion.ca inbox:

Forgot your password?

You sent a request to reset your password to **ablack@legion.ca** Please use the link provided in your email to reset the password for your account.

Dear AMANDA WHITE, we received a request for password change for username 20270554 at RCLDev. [Go to this page](#) to set your new password. The link will be active for one hour.

Regards,
The Legion Portal team

- IN THIS SECTION
- Registration

Join the Legion

Membership Eligibility

Login

Web Mail

Member Web Store

Supply Catalogue

New password

Confirm password

Submit

Enter your new password

Confirm Password

Submit

Navigating the Website:

Under “IN THIS SECTION” on the left side column, select “Home” for branch communications and incentives:

#1- HOME

IN THIS SECTION

▸ Home

Profile

Payment Information

Create/View Branch Members

Branch Rates

Previous Transactions

Membership Processing

Membership Since Date Calculator

Data Change Form

Reports

Help

Branch and Command Resources

[Log out](#)

Welcome to the Membership Processing Website.

Please select from the menu on the left to proceed.

Enter your branch rate to give your members the option to renew online. Each branch will receive a cheque from Dominion Command for any member who renews on line. Cheques are mailed once a month. Thank you!

NEW! Your Branch can win \$2,500 in VIA Rail tickets!

Submit your Branch rate in the Member Services Website on or before June 29, 2018 to be entered into a draw for a voucher for up to \$2,500 in VIA Rail travel. You can use the voucher in a raffle to raise funds for your Branch! The winning Branch will be selected and contacted by July 6.

Commands, branches and sections of The Royal Canadian Legion are invited to assemble their delegates in Winnipeg, MB for the 47th Dominion Convention. Click here: [2018 Convention Call](#)

Branch Transfer Report

Effective January 01, 2018 the Branch Transfer Report will only be available on line. We will no longer be mailing a hard copy to branches on a monthly basis. The Transfer Report can be found under the Reports menu.

Membership Website – Branch Processing Guide

Step by Step instructions on using the membership website!

[Download the Guide](#)

#2- PROFILE

Below “IN THIS SECTION” select “Profile” to update your branch contact details. Dominion Command will provide all branch correspondence in your preferred language.

IN THIS SECTION

- Home
- Profile
- Payment Information
- Create/View Branch Members
- Branch Rates
- Previous Transactions
- Membership Processing
- Reports
- Help
- Branch and Command Resources
- Log out

Profile Main Address Branch Photo

Branch Name: 13-013 DOMINION BRANCH

Branch Number: 13-013

Parent Account: 13 RCL DOMINION COMMAND

Date of Charter:

Main Phone: 855-330-3344

Primary Email: memberhelpdesk@legion.ca

Phone 2:

Secondary Email: memberhelpdesk@legion.ca

Preferred Language: English

Fax:

Website: http://www.legion.ca

Submit

Select “Main Address” to update your branch address.

IN THIS SECTION

- Home
- Profile
- Payment Information
- Create/View Branch Members
- Branch Rates
- Previous Transactions
- Membership Processing
- Reports
- Help
- Branch and Command Resources
- Log out

Profile Main Address Branch Photo

Address

Street 1: 86 AIRD PLACE

Province / State: ON

Street 2:

Postal Code: K2L 0A1

Street 3:

Country: Canada

City: OTTAWA

Bad Address: No

Incomplete Address: No

Submit

Select “Branch Photo” and upload a photo.

The screenshot shows a web interface with a sidebar on the left and a main content area. The sidebar, titled "IN THIS SECTION", contains links: Home, Profile, Payment Information, Create/View Branch Members, Branch Rates, Previous Transactions, Membership Processing, Reports, Help, Branch and Command Resources, and Log out. The "Home" link is circled in red. The main content area has three tabs: Profile, Main Address, and Branch Photo. The "Branch Photo" tab is selected and circled in red. Below the tabs, the "Branch Photo" section is displayed. It includes a "Branch Profile Photo" label, a placeholder image of a red flower, a "Choose file" button circled in red, and a note: "The photo should be less than 5MB and be square to avoid being cut off." A "Submit" button is at the bottom of the section.

#3- PAYMENT INFORMATION

Branches have two payment options:

Option#1: Credit Card Payments (subject to Provincial Command regulations) see steps below. No paperwork is required if the branch pays by credit card.

Option #2: Cheque payment – mail the printed transmittal and the cheque to Dominion Command

Credit Card Payments: Enter the Credit Card information and Save.

The screenshot shows a web interface with a sidebar on the left and a main content area. The sidebar, titled "IN THIS SECTION", contains links: Home, Profile, Payment Information, Create/View branch Members, Branch Rates, Previous Transactions, Membership Processing, Reports, Help, Branch and Command Resources, and Log out. The "Payment Information" link is circled in red. The main content area has a heading: "If your Branch has a credit card that can be used to pay online for your membership fees, please enter the information below." Below this, it states "Visa and Mastercard are accepted." A form is displayed with the following fields: Card Number, Exp. Date (MM YY), First Name, Middle Initial, Last Name, Default Credit Card (checkbox), Street Address, City, State/Province, Zip/Postal Code, Country, Phone (with country code), and Email. A "Save" button is at the bottom right of the form.

Once saved, proceed to the Member Processing section to process the membership years.

#4- CREATE/VIEW BRANCH MEMBERS

Below “IN THIS SECTION” select “Create/View Branch Members” add new member enrollments and to search existing members. Create/View Branch Member section also includes; view a Branch Summary, view Branch Members and export a Branch membership list (branch register) in excel.

Create a “NEW” member profile

To avoid duplicate accounts, first verify that the member number does not exist within your branch records. See “search a member profile” or if the member is reinstating from another branch, verify with Dominion Command the member does not have an existing membership number.

Enrolling a new member is a two-step process. Step one: go to the Create/View Branch Members section to create the member profile. Step two: process the year(s) paid in the Membership Processing section.

The screenshot displays the 'IN THIS SECTION' menu on the left, with 'Create/View Branch Members' highlighted by a red circle. The main content area shows instructions for starting a new member and finding existing members. Below the instructions, there are summary boxes for 'Active Members' (1332), 'Last Year Members' (1459), and 'Branch Account Balance' (1179.1). At the bottom, the 'Members' section features a grid with an 'Add New' button circled in red. The grid has columns for 'Membership ID', 'Name', 'Type', and 'Max Year Paid'.

IN THIS SECTION

- Home
- Profile
- Payment Information
- Create/View Branch Members
- Branch Rates
- Previous Transactions
- Membership Processing
- Reports
- Help
- Branch and Command Resources
- Log out

To start a new member:

1. Click the ADD NEW button in the grid below
2. Add the member information
3. Click Update
4. Now Record the new Membership ID assigned. Click Close
5. Now proceed to **MEMBERSHIP PROCESSING** to process the enrollment with the new membership number.

To find existing members, enter your search criteria in the box above the column in the grid below and click on the button next to it to select the method you would like to search by.

Active Members: 1332

Last Year Members: 1459

Branch Account Balance: 1179.1

Members

Membership ID	Name	Type	Max Year Paid

Create 'New':

Select the ADD NEW button in the grid below

Add the member information

Select Update

“Record” the new Membership ID assigned, you will need it to process the membership in step two. Select Close

Proceed to MEMBERSHIP PROCESSING to process the membership year(s)

Branch Summary View:

Active Members

1293

Last Year Members

1459


Branch Account Balance

1129.11

‘Search’ a Member Profile:

Enter your search criteria in the box above the column to search, click on the button next to it to select the method you would like to search.

In the example below – select the “Name” field the text entered is “Amanda W” and the drop down selected is “Contains”.

Name
 

[Français](#)
[For Members and Branches](#)
[Poppy Store](#)
[Find a Branch](#)
[Contact Us](#)

[HOW WE ARE](#)
[REMEMBRANCE](#)
[ADVOCATING FOR VETERANS](#)
[HOW WE ADVOCATE](#)
[ADVOCATING FOR CHANGE](#)
[COMMUNITIES AND YOUTH](#)
[JOIN US](#)

To find existing members, select the method you would like to search by.

Active Members: 1294

Branch Account Balance: 1129.11

Members

Add New

Membership ID: Name: Type: Max Year Paid:

Membership ID	Name	Type	Max Year Paid
30028982	Amanda West	Associate	2017
20270554	AMANDA WHITE	Associate	2016

'Edit' a Member Profile

Click on the pencil beside the membership number and a new window will open. This window has four tabs: Profile, Additional Information, Membership Information and Military Service.

[Membership Processing](#)
[Membership Since Date Calculator](#)
[Data Change Form](#)
[Reports](#)
[Help](#)
[Branch and Command Resources](#)
[Log out](#)

To find existing members, select the method you would like to search by.

Active Members: 1485

Branch Account Balance: 1179.1

Last Year Members: 1460

Members

Add New

Membership ID: Name: Type: Max Year Paid:

Membership ID	Name	Type	Max Year Paid
30028982	Amanda West	Associate	2017
30034350	Amanda Meehan	Ordinary	2018
20270554	AMANDA WHITE	Associate	2016
30030849	Amanda Black	Associate	0

Member Details:

This section includes Member Profile, Additional Information, Membership Information and Military service tabs

Member Profile

Update contact details and select “Update”

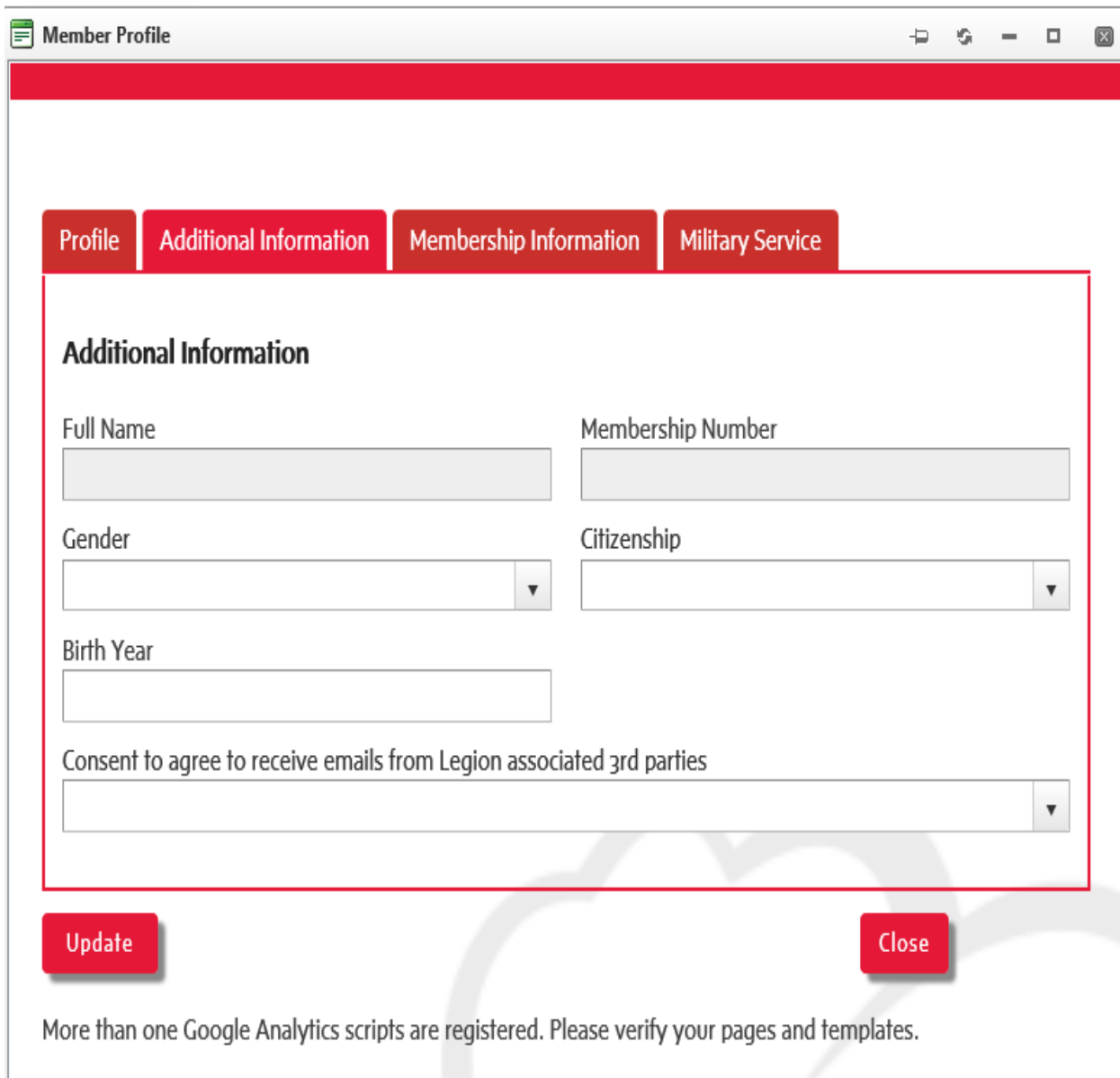
****New**** –branches can now update deceased members in real time

The screenshot shows a web form for updating member details. At the top are four tabs: 'Profile' (selected), 'Additional Information', 'Membership Information', and 'Military Service'. The form is divided into two columns. The left column contains fields for 'First Name*' (AMANDA), 'Last Name*' (BLACK), 'Salutation' (dropdown), 'Middle Name', 'Preferred Language*' (English), 'Membership Status' (Dormant), and an 'Address' section with 'Street 1*' (49 JAMES LEWIS AVE), 'Street 2', 'Street 3', 'City*' (OTTAWA), 'Bad Address' (No), and 'Incomplete Address' (No). The right column contains 'Membership Type*' (Associate), 'Membership Number' (20270554), 'Primary Email' (ablack@legion.ca), 'Home Phone' (6135555555), 'Mobile Phone', and 'Deceased' status with radio buttons for 'Yes' and 'No' (selected). A red circle highlights the 'Deceased' section. At the bottom left, a red 'Update' button is circled in red. At the bottom right is a red 'Close' button.

Profile	Additional Information	Membership Information	Military Service
First Name* AMANDA		Membership Type* Associate	
Last Name* BLACK		Membership Number 20270554	
Salutation ▼		Primary Email ablack@legion.ca	
Middle Name 		Home Phone 6135555555	
Preferred Language* English ▼		Mobile Phone 	
Membership Status Dormant		Deceased <input type="radio"/> Yes <input checked="" type="radio"/> No	
Address			
Street 1* 49 JAMES LEWIS AVE		Province / State ON ▼	
Street 2 		Postal Code* K2S 1K3	
Street 3 		Country* Canada ▼	
City* OTTAWA			
Bad Address No		Incomplete Address No	
Update		Close	

Additional Information:

Gender, citizenship, birth year and consent to receive emails from Legion associated 3rd parties



The screenshot shows a web browser window titled "Member Profile". It features four tabs: "Profile", "Additional Information", "Membership Information", and "Military Service". The "Additional Information" tab is selected and highlighted with a red border. Inside this tab, there are several form fields: "Full Name" and "Membership Number" (text inputs), "Gender" and "Citizenship" (dropdown menus), "Birth Year" (text input), and "Consent to agree to receive emails from Legion associated 3rd parties" (checkbox). At the bottom of the tab, there are two red buttons: "Update" and "Close". Below the tab area, a message states: "More than one Google Analytics scripts are registered. Please verify your pages and templates."

Member Profile

Profile Additional Information Membership Information Military Service

Additional Information

Full Name Membership Number

Gender Citizenship

Birth Year

Consent to agree to receive emails from Legion associated 3rd parties

Update Close

More than one Google Analytics scripts are registered. Please verify your pages and templates.

Membership Information:

View a Member Transmittal and Transaction History

Sort by clicking on each header

Click on link to view transmittal

Note: To view and Print a Transmittal- See Previous Transactions

Membership Information

Full Name: AMANDA WHITE

Membership Number: 20270554

Membership Year: 2016

Member Since: 01/01/15 0:00:00

Years of Service: 3

Membership Years

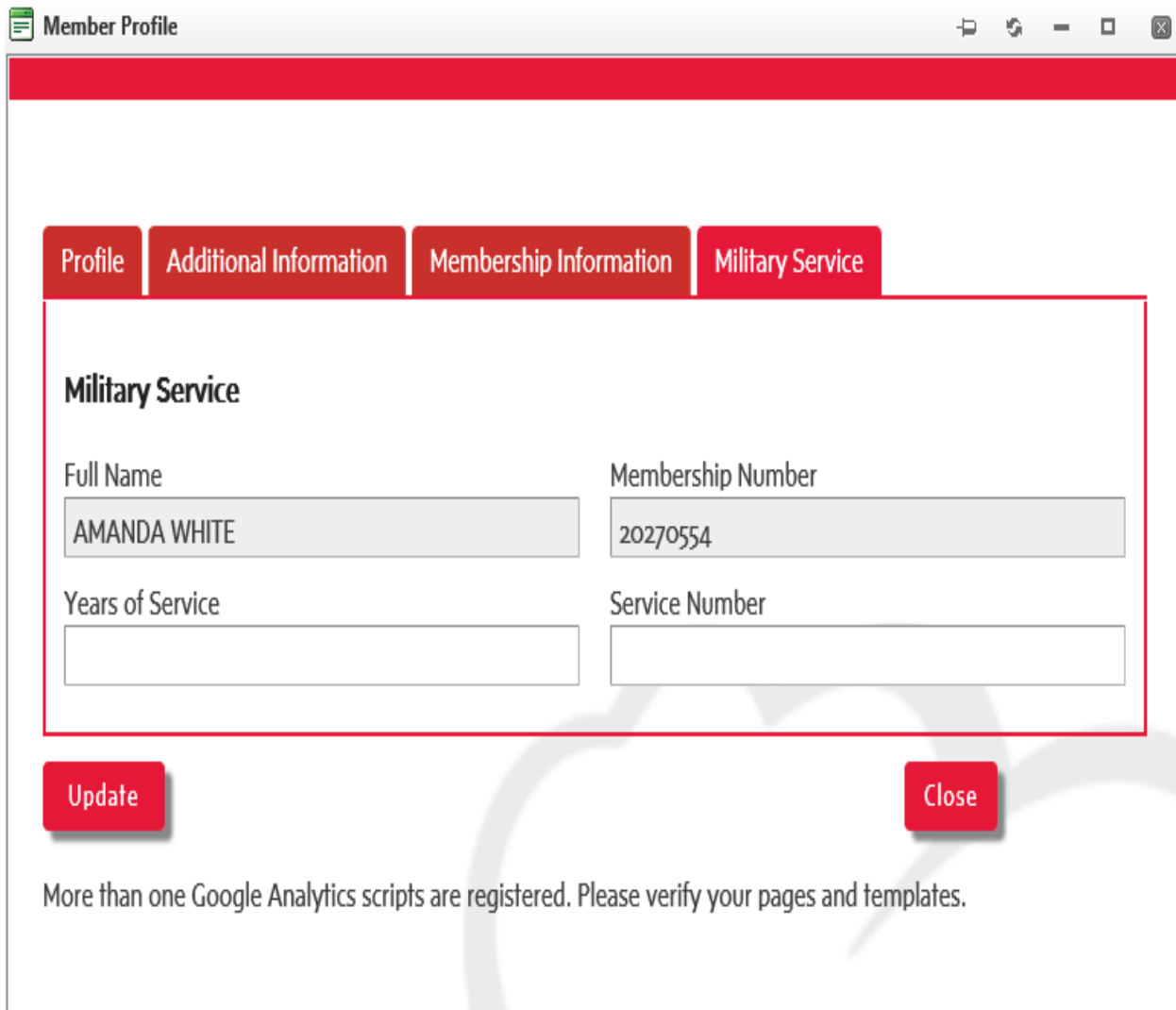
	Membership Year	Y of S	Type	Document	Transaction Date	Transmittal #
View Transmittal	2016	3	Associate	WB01858	3/15/2016 12:00:00 AM	13-013-40204288
View Transmittal	2015	2	Associate	WB01055	10/29/2014 12:00:00 AM	13-013-40203557
View Transmittal	2014	1	Associate	WB00724	4/18/2014 12:00:00 AM	13-013-40203236

Military Service:

Enter the number of years served and the service number

Select Update

Select Close



The screenshot shows a web browser window titled "Member Profile". The window has a red header bar. Below the header, there are four red tabs: "Profile", "Additional Information", "Membership Information", and "Military Service". The "Military Service" tab is selected. The content area is titled "Military Service" and contains four input fields arranged in a 2x2 grid. The first row has "Full Name" with the value "AMANDA WHITE" and "Membership Number" with the value "20270554". The second row has "Years of Service" and "Service Number", both of which are empty. Below the input fields, there are two red buttons: "Update" and "Close". At the bottom of the window, there is a message: "More than one Google Analytics scripts are registered. Please verify your pages and templates."

Military Service	
Full Name	Membership Number
AMANDA WHITE	20270554
Years of Service	Service Number

Update **Close**

More than one Google Analytics scripts are registered. Please verify your pages and templates.

Branch Register - Export Membership List in Excel:

Select the 'Export Branch Members' button and wait for the Excel sheet to load, once loaded, the excel sheet will populate on the bottom left of the screen, select open.

Note: Members paid for the current year and the last two previous years will be included on the list. Note: deceased members are not included.

Members

Add New

Membership ID	Name	Type	Max Year Paid
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
30028982	Amanda West	Associate	2017
20270554	AMANDA WHITE	Associate	2016

Export Branch Members

Branch Membershi...xls

Select Enable Editing

Select Export Branch Members and Save Worksheet

Branch Membership Portal Export (1) [Protected View] - Excel

File Home Insert Page Layout Formulas Data Review View Power Pivot Tell me what you want to do...

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

A1

Report Date: 2017.10.31

13 RCL DOMINION COMMAND

THE ROYAL CANADIAN LEGION

BRANCH MEMBERSHIP REGISTER

13-013 DOMINION BRANCH

Page No. 1

Membership Type	Member Number	Surname, Given Name	Street Address	City Province	Postal Code Country	Language	Max Year Paid	Incomplete Address	Bad Address	Send Magazine	Years Of Service	Email Address	Phone	Auto Renewal
-----------------	---------------	---------------------	----------------	---------------	---------------------	----------	---------------	--------------------	-------------	---------------	------------------	---------------	-------	--------------

#5 – PRINT MEMBER LABELS

- Export members and save the excel file to your Desktop
- Open Word, choose file > New > Blank Document
- Start with the Mailings (tab)
- On the Mailings Tab, in the start mail merge group, choose Start Mail Merge
- Select - Step by Step Mail Merge Wizard
- Select Labels on the far right column of the page
- Step 1 of 6 - Select Next starting document
- Select label options
- Label Information – Label Vendors: Select Avery US Letter from the dropdown list
- Under Product Number: Scroll down to select 5162 Easy Peep Address Labels and select OK
- Step 2 of 6 – Select Next select recipients
- Click on Browse- Select your document from the desktop
- Step 3 of 6 – Select Next Arrange your labels
- Click on More Items
- Select the first field you would like to see on your label i.e. First Name select Insert and close click space and select last name on the same line
- Select the next line and click More Items select address 1
- Select the next line and select City
- Select More items on the same line as City and select State/Province and close
- On the next line item - More items and select ZIP
- Click on the button UPDATE ALL LABELS
- Step 4 of 6 – Next: Preview your labels
- Step 5 of 6 – Next: Complete the Merge
- Step 6 of 6 - Edit Individual Labels (double check that labels are formatted correctly)
- Select – ALL and OK
- Save file
- Enter labels into printer and Print.

#6- BRANCH RATES:

Below “IN THIS SECTION” select Branch Rates. For members to renew their membership on line, “Full” branch rates for both the current year (2018) and next year (2019) must be entered into this section.

The amount you enter for your Branch Rate is the amount your branch collects from the member and retains. It does not include the Dominion per capita tax portion. For example, if you remit \$37 Per Capita tax to Dominion Command and your members pay a total of \$50 to your branch, then your Branch Rate to enter in this field is \$13.

When a member has processed online, an email notification is emailed to both the member and to the Branch @legion.ca email address provided by Dominion Command.

Dominion Command will remit the branch portion via cheque monthly to the local branch, and will include a paper transmittal report.

Branch Payables For 13-013

Data From: 9/1/2017 To: 9/30/2017

Date: 10/3/2017
2:30:02 PM

Member	Member ID	Renewal Year	# of Transactions	# Additional Years	Payable Amount
Amanda White	20270554	Next Year	1	0	\$10.89
Total -->			1		\$10.89



Add a Branch Rate

Select the Branch Rate Tab and Add New

IN THIS SECTION

- Home
- Profile
- Payment Information
- Create/View Branch Members
 - Branch Rates
- Previous Transactions
- Membership Processing
- Reports
- Help
- Branch and Command Resources
- Log out

PLEASE NOTE: The amount you enter for your Branch Rate is the amount your branch collects from your member and retains. It does not include the Dominion per capita portion. When your member pays online, the amount you enter in this field will be returned to you by Dominion Command.

For example, if you remit \$37 to Dominion Command and your members pay a total of \$50, then your Branch Rate would be \$13.

Branch Rates | Provincial Rates

Active Members: 1332 | Last Year Members: 1459

Membership Balance: 1179.1

Rates

Add New

Type	Year	Rate	Proration Type

Rates

Add New

Type	Year	Rate	Proration Type
	2018		
Branch	2018	0.0000	Full

Type - select "Branch"

Year - Enter 2018 (current year) and select the button beside the year and selecting "Contains" and Submit.

Rate: Enter your branch rate

Proration Type: select "Full"

Rates

Please fill out all of the fields and click Submit to enter your Branch Rate. The Proration Type is for new members who pay for either half or one third of their first year. Please enter only one year per rate in YYYY format.

Type: Branch
Year: 2018
Rate: \$13.00
Proration Type: Full

Submit

Once the (current year 2018 and next year 2019) rates are entered members can then renew on line once they have registered and logged into the portal.

If you need assistance to enter your branch rate, please contact Member Services 1-855-330-3344.

Edit a Branch Rate

Click on the pencil beside branch to edit the branch rate, branches are to update branch rates in the portal when changes occur.

Rates

Add New

Type

Branch

#7- PREVIOUS TRANSACTIONS

Below “IN THIS SECTION” select Previous Transactions. Select various criteria in the boxes below by selecting the ‘filter’ button beside the column where you have entered text.

- Enter Process Date
- Select Contains
- View your branch transactions for the date entered

The screenshot shows a web application interface. On the left is a sidebar with a section titled "IN THIS SECTION" containing links: Home, Profile, Payment Information, Create/View Branch Members, Branch Rates, Previous Transactions (circled in red), Membership Processing, Reports, Help, Branch and Command Resources, and Log out. The main content area has fields for "Branch Name" (13-013 DOMINION BRANCH) and "Branch Number" (13-013). Below these is the "Previous Transactions" section. It features a table with columns: Transmittal #, Process Date, Amount, Cheque #, and # of Transactions. The "Process Date" field is circled in red and contains the date "10/31/2017". A dropdown menu is open for the "Process Date" column, showing filter options: NoFilter, Contains (circled in red), DoesNotContain, StartsWith, EndsWith, EqualTo, NotEqualTo, GreaterThan, LessThan, GreaterThanOrEqualTo, LessThanOrEqualTo, IsNull, and NotIsNull. The table shows one entry with Transmittal # 13-013-40363603, Process Date 10/31/2017 8:12:00, Amount CC, and # of Transactions 2.

View and Print a Transmittal

To review the complete transmittal click on the pencil beside the transmittal number and Print transmittal

IN THIS SECTION

Home

Profile

Payment Information

Create/View Branch Members

Branch Rates

Previous Transactions

Membership Processing

Membership Since Date Calculator

Data Change Form

Reports

Help

Branch and Command Resources

[Log out](#)

Branch Name

13-013 DOMINION BRANCH

Branch Number

13-013

Previous Transactions

Transmittal #	Process Date	Invoice Number	Invoice Amount	Cheque #	# of Transactions
13-013-40204288	3/15/2016 12:00:00 AM		249.9500		5

View Details

Branch

13-013 DOMINION BRANCH

Process Date

15/03/2016

Transmittal #

13-013-40204288

Payment Amount

249.95

Invoice Number

Invoice Amount

249.95

Transactions

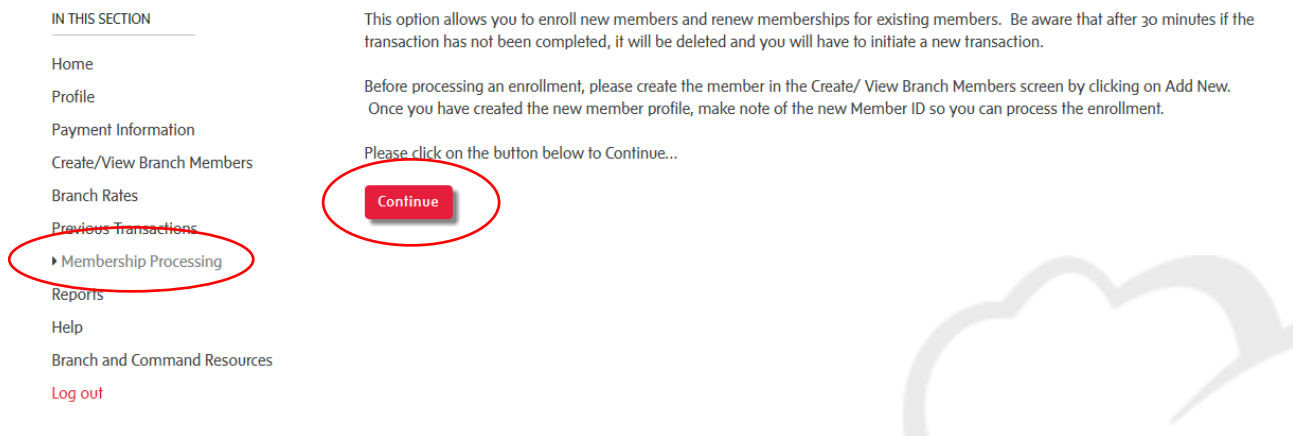
Process Type	Member ID	Member	+ Years	# of Transact	Renewal Yea	Enrollment C	Back Years	Lifetime Yea
Renewal	10214700	MICHAEL COLLACUTT		1	Current Year	Current Year	No	
Enrollment	10254199	LORRAINE MORROW		1	Current Year	Current Year	No	
Renewal	20270554	AMANDA WHITE		1	Current Year	Current Year	No	
Renewal	7891642	KEVIN DONOVAN		1	Current Year	Current Year	No	
Renewal	7891642	KEVIN DONOVAN		1	Current Year	Current Year	No	

Print Transmittal

More than one Google Analytics scripts are registered. Please verify your pages and templates.

#8- Membership Processing

Below “IN THIS SECTION” select Membership Processing



Select the Continue button to begin the process.

The Processing Details window will open. Please take the time to review notes.

Note: Life Members are auto-renewed in the system and do not require annual processing.

Processing Examples:

See examples below for processing Enrollments, Renewals (current year and next year), Buy Back Years and multiple transactions for a member.

Note: Additional Years are processed as future years 2019 and above and Buyback years processed as previous years.

Example #1 – Enrollment:

In this Example: The Member is enrolling for the current year (2018) and next year (2019) and the membership number noted from the previous step.

Before processing an enrollment, please create the member in the “Create/ View Branch Members” section on the left column, Click on “Add New”. Once you have created the new member profile, make note of the new Member ID so you can process the enrollment in this section.

Membership Processing

Membership Since Date Calculator

Data Change Form

Reports

Help

Branch and Command Resources

Log out

Branch

13-013 DOMINION BRANCH

Transmittal #

13-013-40380526

Invoice Number

Cheque Number

Process Date

31/01/2018

Payment Amount

Invoice Amount

Cheque Amount

Transactions

Add New

Member	Process Type	Additional Years	Renewal Year	Start Enrollment On	Already Paid
Currently there are no records that match your criteria.					

Processing Details

Select the Process Type and the screen will automatically update to provide all the required fields. Please make a selection and enter the appropriate information in all the fields shown on the screen after you select your process type. Enter the **Membership Number**, then select the **renewal year** or **enrollment year**. After you click **Save**, the Member's Name field will populate - letting you know that the record saved correctly.

Once you have saved the record, enter in any additional years or buy back years then click **Close**. If you do not have any additional years or buy back years, you can leave those fields blank and click **Close**.

The Renewal Year is based on the current calendar year date. If you are processing additional years you must first choose the Renewal Year.

Reinstatements are processed as Renewals.

Process Type

Membership Number

Member

Buy Back Years?
☐ Yes ☒ No

Save **Close**

Process Type

Enrollment

Enrollment

Renewal

Buy Back Years

Enter Membership number and Save

Process Type
Enrollment

Membership Number
20270554

Member

Start Enrollment On
Current Year

Buy Back Years?
☐ Yes ☒ No

Additional Years
+ 1 Year

Save

Close

The current year was selected (2018) and additional years (2019) +1 Year is also selected.

Click on Save.

The members name will then appear in the Members Field

Select Close

Select "Add New" for each additional member you would like to process.

Transactions

Add New

Member	Process Type	Additional Years	Renewal Year	Start Enrollment On	Already Paid
Currently there are no records that match your criteria.					

See page #22 [Completing Transactions](#) for further instructions on completing this process.

Example #2 - Renewal Current Year

Select Add New

Transactions



Member	Process Type	Additional Years	Renewal Year	Start Enrollment On	Already Paid
Currently there are no records that match your criteria.					

In this example: the member is renewing for the current year (2018)

Select the Process Type and the screen will automatically update to provide all the required fields. Please make a selection and enter the appropriate information in all the fields shown on the screen after you select your process type. Enter the **Membership Number**, then select the **renewal year** or **enrollment year**. After you click **Save**, the Member's Name field will populate - letting you know that the record saved correctly.

Once you have saved the record, enter in any additional years or buy back years then click **Close**. If you do not have any additional years or buy back years, you can leave those fields blank and click **Close**.

The Renewal Year is based on the current calendar year date. If you are processing additional years you must first choose the Renewal Year.

Reinstatements are processed as Renewals.

Process Type

Renewal ▼

Membership Number

20270554

Member

Renewal Year

Current Year ▼

Buy Back Years?

☐ Yes ☒ No

Additional Years

| ▼

Save

Close

Click on Save and Close window.

Add members, one at a time by clicking on Add New.



See [Completing Transactions](#) for further instructions on completing this process.

Example #3 - Renewal Next Year

In this example: the member is renewing for the next year (2019)

Reinstatements are processed as Renewals.

A screenshot of a 'Renewal' form. The 'Process Type' dropdown is set to 'Renewal' and is circled in red. To the right of the form is a search button, also circled in red. The form includes fields for 'Membership Number' (20270554), 'Renewal Year' (Next Year), 'Additional Years', and 'Buy Back Years?' (Yes/No). There are 'Save' and 'Close' buttons at the bottom. A large, faint 'M' watermark is visible in the background.

Click on Save and Close window.

Add members, one at a time by clicking on Add New.



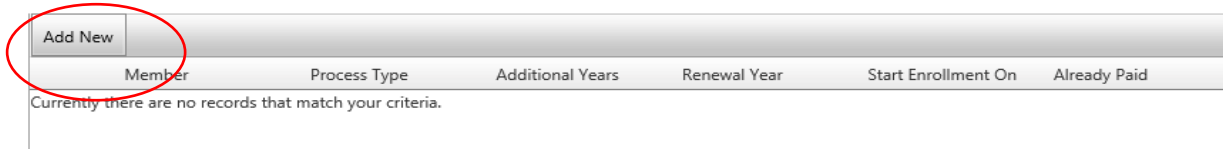
See [Completing Transactions](#) for further instructions on completing this process.

Example #4 - Buy Back Years

Note: 2017 is processed as a buy back year as of Feb 1st, 2018

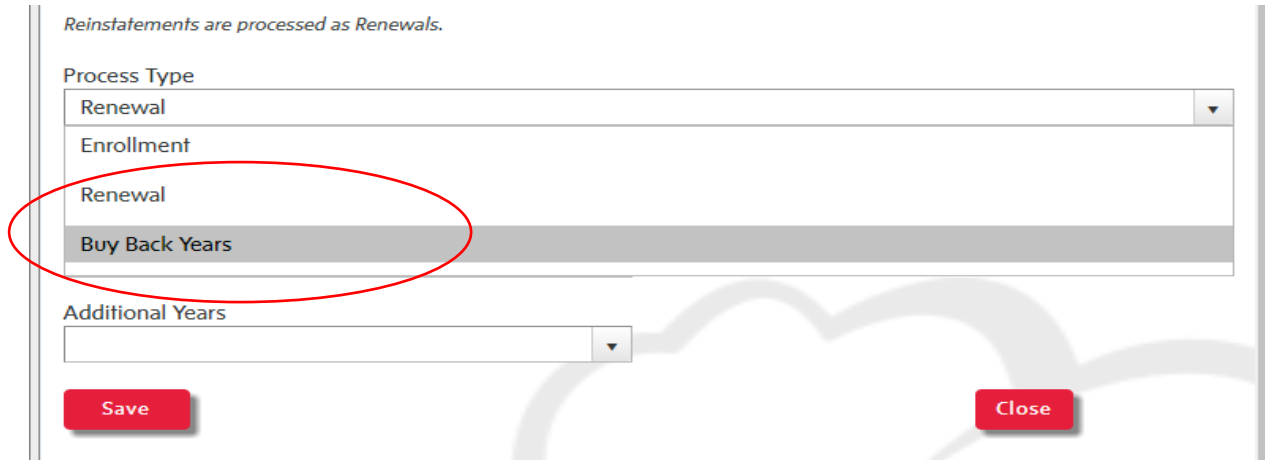
Add members, one at a time by clicking on Add New.

Transactions



The screenshot shows a table titled "Transactions". The "Add New" button in the top left corner is circled in red. The table has columns: Member, Process Type, Additional Years, Renewal Year, Start Enrollment On, and Already Paid. Below the table, a message states: "Currently there are no records that match your criteria."

In this example: The member is buying back one year.



The screenshot shows a form titled "Reinstatements are processed as Renewals." The "Process Type" dropdown menu is open, showing options: Renewal, Enrollment, Renewal, and Buy Back Years. The "Buy Back Years" option is circled in red. Below the dropdown is the "Additional Years" field. At the bottom are "Save" and "Close" buttons.

Enter the membership number and SAVE

The member name will auto-populate

Select Buyback Years – “yes”

Reinstatements are processed as Renewals.

Process Type

Buy Back Years

Membership Number

20270554

Member

AMANDA WHITE

Buy Back Years?

☒ Yes ☐ No

Add New

Year

Currently there are no records that match your criteria.

Select Save and enter the year you would like to buy back and select Add New

Reinstatements are processed as Renewals.

Process Type

Buy Back Years

Membership Number

20270554

Member

AMANDA WHITE

Buy Back Years?

☒ Yes ☐ No

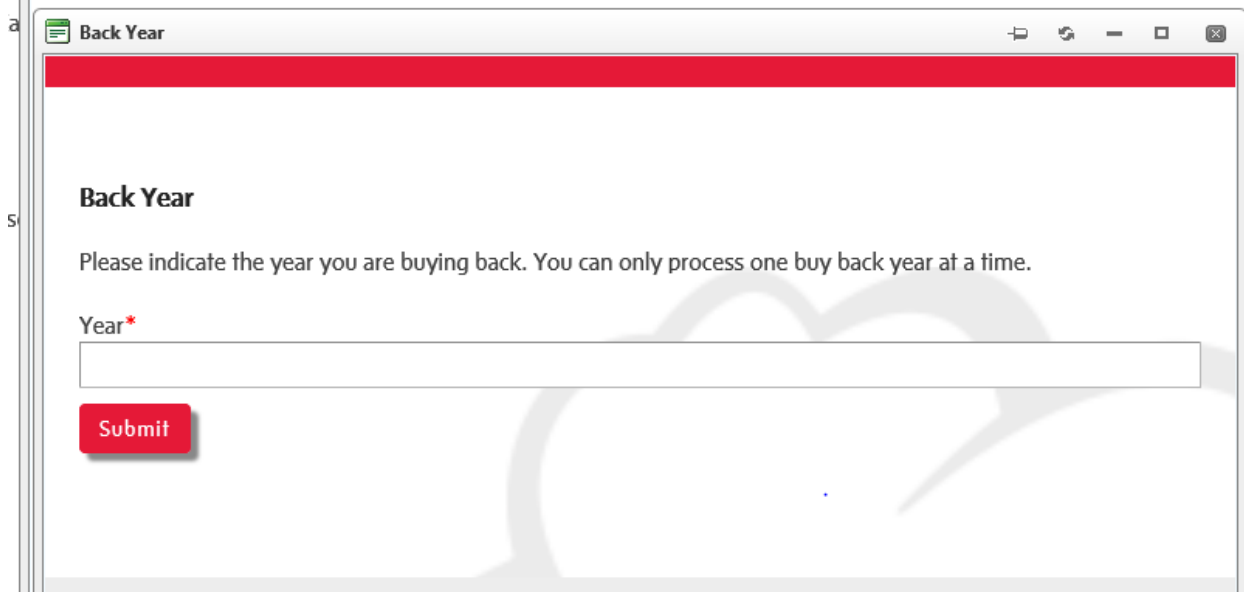
Add New

Year

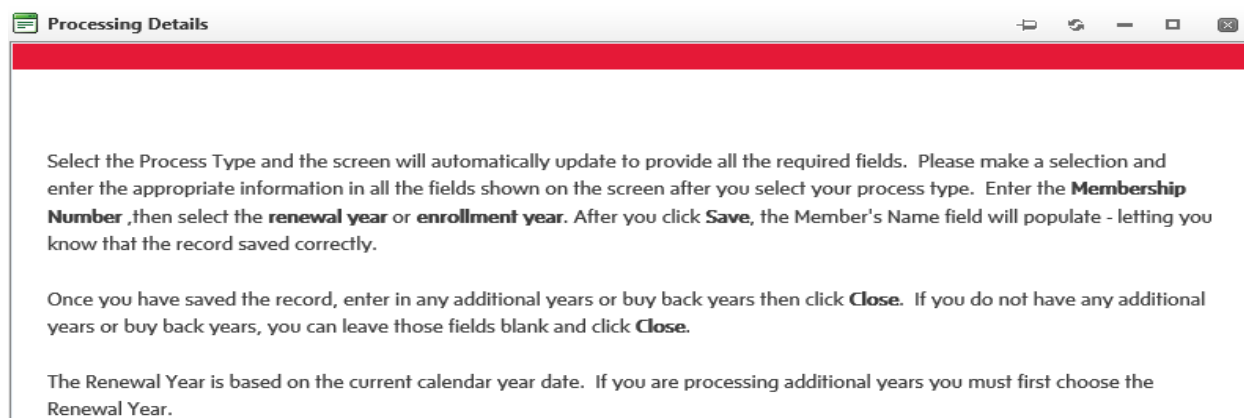
Currently there are no records that match your criteria.

Once you have saved the record, enter in any additional years or buy back years then click **Close**. If you do not have any additional years or buy back years, you can leave those fields blank and click **Close**.

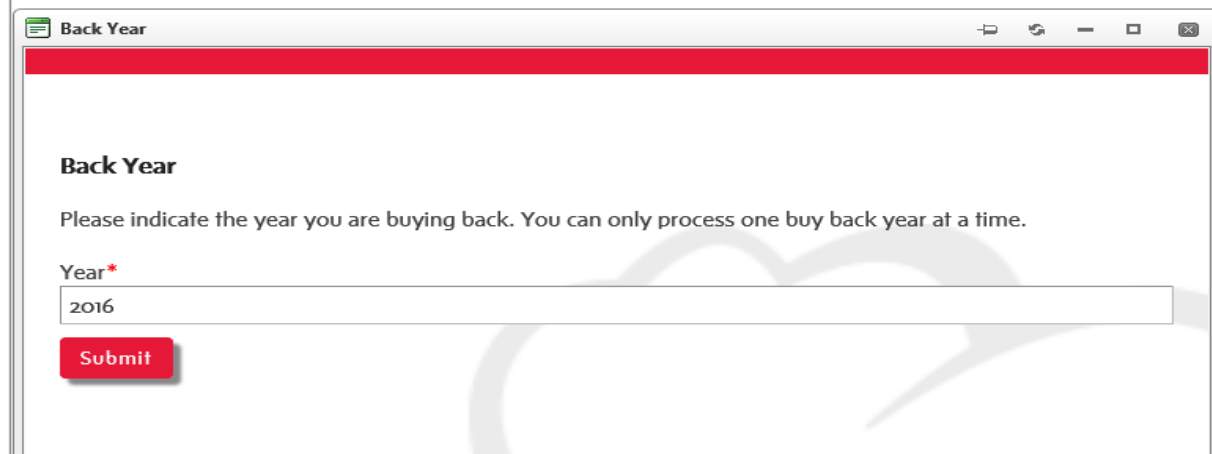
The Renewal Year is based on the current calendar year date. If you are processing additional years you must first choose the Renewal Year.



The screenshot shows a web browser window titled "Back Year". The page has a red header bar. Below the header, the title "Back Year" is displayed. The main text reads: "Please indicate the year you are buying back. You can only process one buy back year at a time." Below this text is a text input field labeled "Year*" with a red asterisk. The input field is empty. Below the input field is a red "Submit" button.



The screenshot shows a web browser window titled "Processing Details". The page has a red header bar. Below the header, the title "Processing Details" is displayed. The main text reads: "Select the Process Type and the screen will automatically update to provide all the required fields. Please make a selection and enter the appropriate information in all the fields shown on the screen after you select your process type. Enter the **Membership Number**, then select the **renewal year** or **enrollment year**. After you click **Save**, the Member's Name field will populate - letting you know that the record saved correctly." Below this text is another paragraph: "Once you have saved the record, enter in any additional years or buy back years then click **Close**. If you do not have any additional years or buy back years, you can leave those fields blank and click **Close**." Below that is a third paragraph: "The Renewal Year is based on the current calendar year date. If you are processing additional years you must first choose the Renewal Year."



This screenshot shows the "Back Year" form window again, but now the "Year*" input field contains the text "2016". The "Submit" button remains red and is positioned below the input field.

* Buy Back Years require you to click Submit. If processing multiple buy back years enter one year at a time by selecting Add New.

See [Completing Transactions](#) for further instructions on completing this process.

Example #5 - Multiple Processing for one member

Renewal- In this example the member is paying for the next year 2019 and 3 additional years 2020, 2021 and 2022

Note: If a member would like to prepay (2020 and above), but has already paid for the next year (2019). Call membership services to assist with processing. 1-855-330-3344 (the next year 2019 is has to be refunded by Dominion Command before additional years can be processed)

Select the Process Type and the screen will automatically update to provide all the required fields. Please make a selection and enter the appropriate information in all the fields shown on the screen after you select your process type. Enter the **Membership Number**, then select the **renewal year** or **enrollment year**. After you click **Save**, the Member's Name field will populate - letting you know that the record saved correctly.

Once you have saved the record, enter in any additional years or buy back years then click **Close**. If you do not have any additional years or buy back years, you can leave those fields blank and click **Close**.

The Renewal Year is based on the current calendar year date. If you are processing additional years you must first choose the Renewal Year.

Reinstatements are processed as Renewals.

Process Type
Renewal

Membership Number
20270554

Member

Renewal Year
Next Year

Buy Back Years?
☒ Yes ☐ No

Additional Years
+ 3 Years

Save Close

Click Save

Back Year

Please indicate the year you are buying back. You can only process one buy back year at a time.

Year*
2016

Submit

Click on Submit.

Add members, one at a time that you would like to process by clicking on Add New.

See [Completing Transactions](#) for further instructions on completing this process.

Completing Transactions:

Once you have added all the member transactions, select a method of payment Check or Credit Card.

Note: If you choose to pay by credit card, you will need to set up your Payment Information, before processing any transactions. Once your method of payment has been selected click on Calculate Payment.

If you do not immediately see the Invoice Amount, please “refresh” your screen by clicking the “F5” button on your keyboard.

To change or add any transactions after selecting calculating payment, click on Edit Transactions before advancing to Process Payment.

If you choose to pay by cheque, please enter the Cheque Number and Cheque Amount in the fields provided.

**** Select the method of payment on the bottom of each page.**

If you choose to pay by cheque, please print the Transmittal, attach the cheque to it, and mail it to Dominion Command.

The processing is now complete and you may log out of the system if you have nothing further to do.

Dominion Command mails all membership cards to the branch. Please allow 4 weeks for shipping.

Refunds and Processing Errors:

Please contact Dominion Command to process all refunds and/or to correct processing errors.

#9- Data Change Form

The Data Change Form is a newly added option in our portal. Please enter changes to submit for Dominion Command Processing. Please note: Processing Data Changes may take up to five business days to update.

-Transfers

-Deceased Members- (Can be updated on a Member profile in real time, see pg. 12)

-Replacement Card Request

-Legion Magazine Delivery Updates

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Please select from the drop down list below and enter the necessary information.

Select a choice

Deceased Member ▼

Member Name

Membership Number

Additional Comments

Submit

*****Transfers*****

-A replacement card is processed, if the member is transferring and has paid for the current year.

-If the member has not paid for the current year and is transferred into your branch. Please submit per capita tax for 2018 and request a replacement card at the same time as transfers do not automatically print cards when transferred.

#10- Reports

Please select the report you would like to view and select Generate Report to open.

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📄 Export as pdf document

📄 Generate Report

ReportName
Membership - Branch Register
Membership - Branch Statement
Branch Membership Register - Deceased
Branch Membership Register - New Members
Branch Membership Register - Bad or Incomplete Addresses
Branch Transfers Past 6 Months
Statistics - Deceased Membership by Branch
Statistics - New Membership by Branch
Statistics - Paid Membership by Branch
Statistics - Renewal Membership by Branch
Statistics - Deceased Membership Summary
Statistics - New Membership Summary
Statistics - Paid Membership Summary
Statistics - Renewal Membership Summary
Statistics - Deceased Membership Zone and District Summary
Statistics - New Membership Zone and District Summary
Statistics - Paid Membership Zone and District Summary

- Branch register in .pdf format
- Branch statement (suspense) as of July 22, 2016:
- Deceased Member Report
- New/Reinstated members
- Bad or Incomplete addresses
- Transfer Report (6 months)
- Monthly branch and zone reports

#11- Help

Below “IN THIS SECTION” select ‘Help’ this section includes training guides, training videos and FAQ’s .

Training Guides



Membership Website for Branches

Training Videos

Hover over a video to see the title and click on it to play. You can make the videos full screen by clicking on the icon on the bottom right of the video.



Frequently Asked Questions (FAQ)

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Frequently Asked Questions (FAQs)

- How do you enroll a new member?
 - First, go to **Branch Members** and click on Add New. Fill out the fields in the Member Profile and click Update. Write down the new Membership ID number. Go to **Membership Processing** and select Enrollment in the process type. Enter the new Membership ID and click Save. If you have any additional years or buy back years, add them now or click on Close to finish.
- How does the branch receive their money if a member renews on line?
 - Branches will receive their portion of the fees regularly from DC via cheque
- How will a branch know when a member has renewed on line?
 - An email notification will be sent to the branch immediately. A paper transmittal and membership card will be mailed to the branch per the standard procedures.
- When a member renews on line is the card still sent to the branch?
 - Yes
- Is paperwork still required if a branch uses the website?
 - Only if the Branch is paying by cheque, then the Transmittal will need to be printed and attached to the cheque and mailed to Dominion Command.
- How does the website help reduce mistakes?
 - By automatically calculating the totals for the processing records entered and by preventing duplicate payments for the same members.
- What kind of training will be available for branches?
 - On line Training videos and training guides will be available on this website.
- Can members still pay at the branch?
 - Yes
- What kind of Internet service is required.....dial up?
 - Basic Internet service is required and Internet browsers (Internet Explorer, Firefox, Chrome, etc.) should be kept up to date with updates from their providers.

#12- Branch and Command Resources

IN THIS SECTION

Membership
Bylaws and Branch Management
All Branch Emails
Marketing and Public Relations
Service Bureau
Poppy and Remembrance
Rituals, Awards and Protocol

Membership

The information and resources in this section assists Branches with membership administration. For questions or assistance, please contact Dominion Command Member Services. We will be happy to help!

Toll Free: 855-330-3344
Fax: 613-591-8462
Email: Membership@Legion.ca

Member Services Hours of Operation

Member Services is open Mon-Fri, 8:30 – 4:00 p.m. EST

Publications, Guides and manuals

- **Membership Manual**
- **Membership Form Processing Guide**
- **Membership Website – Branch Processing Guide**

Forms

- [Application for Membership](#) [800293]
- [Application for Life Member Award](#) [800282]
- [Graduating Cadet Application](#)
- [Declaration of Legion Service](#)
- [Declaration of Ladies Auxiliary Service](#)
- [Transfer Application](#) [800792]
- [Member Master Card](#) [800148]

Member Retention Resources

- [Letter for New Members](#) [800815]
- [Member Renewal Letter](#) [800395]
- [Early Bird Poster](#) [800684]
- [Early Bird Letter](#) [800711]
- [Branch Hospitality Program](#)

Per Capita Tax

1205. Each branch shall: a. remit at least monthly to Dominion Command a per capita tax payment of all tax collected during the preceding month;

- [Per Capita Tax Rate](#)

Additional Resources

- [Member benefit partners](#)
- [Membership Matters](#)

Monthly Membership and Year End Reports

Monthly Membership Statistics / Year End Reports

[Click here to view](#)

Bylaws and Branch Management

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Rituals, Awards and Protocol

Member Sports

Leadership Development

Dominion Convention

Supply Department

Member Programs

[Return to Membership Portal Home](#)
[Log out](#)

Bylaws and Branch Management

The information and resources in this section assists Branches and Members with Legion Bylaws and Branch management. For questions or additional assistance, please [contact your Provincial Command](#).

Publications, Guides, and Manuals

- [Act to Incorporate](#)
- [General By-laws \(amended January 2018\)](#)
- [Rules of Procedure \(July 2017\)](#)
- [Branch Leadership Manual \(For historical reference\)](#)
- [Real Property Development Handbook](#)

Forms

- [Complaint Form](#)



All Branch Emails

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All Branch Emails

Stay up to date on national updates, activities, policies, programs, and helpful resources for your Branch.

We are moving towards sending correspondence by email to reduce operating expenses and create efficiencies. Please ensure that your primary branch email, phone and mailing address are up-to-date in our database. Update your Branch profile on the Member Services Website or email Member Services at membership@legion.ca.

[Click to view All-Branch Emails](#)



**** See the menu on the left for many other useful resources.**

#13- Log Out

Questions: If you have questions regarding your account or technical, issues please call: 1-855-330-3344 or email memberhelpdesk@legion.ca