

Back of House Support Guide 15-05

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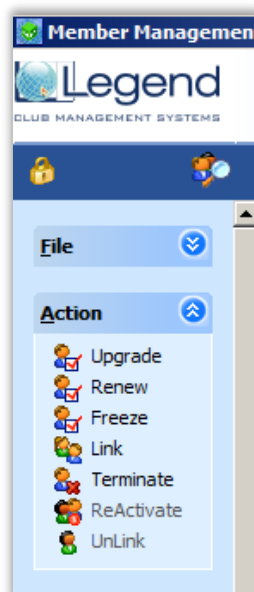
1. MEMBERSHIP MANAGEMENT

There are 2 ways to open this application.

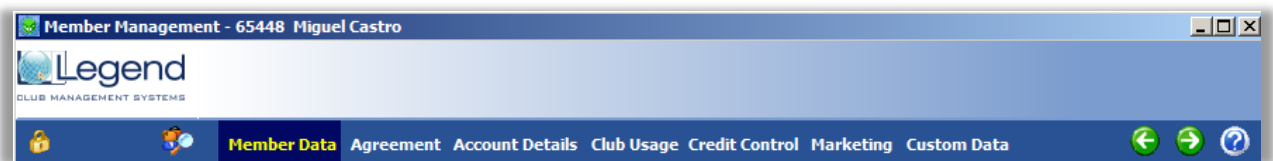
1. From your Legend desktop open the Legend Membership Management icon.
2. When you have a member in your passport in Front of House you will have the option in the passport for "Member Admin", this loads the current member directly into Membership Management.

1.1. OVERVIEW

To the left of this application is the function bar, any action relating to a member can be found in this column.



Along the top you have various tabs, by default you will always start on the 'Member Data' tab, you will click through these tabs to see various information about the member.



At the top left of this application you will see a gold padlock icon, when you click this you are in edit mode, this allows you to change certain member details such as home address, phone numbers etc. While in this mode you can click the padlock again to undo any changes or the green save icon that appears to save your changes.



Along the bottom you will have several key bits of information such as the member balance, member status, member issues and the current user that is logged into Legend.

Balance: £0.00

Active

No Issues

JBarlow

The white box with the magnifying glass is the search field, this works in the same way as Front of House and accepts the members name (surname first), member number or barcode number.

1.2. MEMBERSHIP MANAGEMENT TABS

1.2.1. MEMBER DATA

This tab allows you to view / edit basic member details such as their name & contact details, you can also update medical preferences using the 'Medical Info' button towards the bottom right. Please note that you should not change the 'Status' as this will automatically change depending on any agreement actions that occur.

1.2.2. AGREEMENT

Agreement Detail:

From here you will be see the agreement the member is currently on and any historical agreements. You can use the small green/yellow icon to see the full details of the agreement the member is on and you can use the red/green arrow icon to see any historical agreements.

Agreement Information:

Here you can see all of the current agreement dates, the Last Use Date determines when the membership will lapse if they're a paid-in-full member, direct debit memberships will not lapse until you use the termination wizard to manually lapse them.

Payment Information:

Shows the payment dates, payment cycle and type and the autobill option.

If autobill is ticked then the membership will NOT lapse unless you use the termination wizard, this is usually selected by default for direct debit & casual memberships.

Fees:

The only fee you should change here is the Periodic Payment, this is the cycle fee.

Contract Dates:

Signed date – Is the date the member 'signed' their agreement contract.

Termination Date – This will show the date the agreement is due to or previously has lapsed, if you wish to cancel a future lapse you can use the edit button (padlock) and then delete the date from this field. If the member is already lapsed then you should use the ReActivate wizard and then the Upgrade wizard.

Termination Reason – The selected reason for lapsing the agreement.

1.2.3. ACCOUNT DETAILS

Bank Details:

This where you will be able to create/add a new bank account for a member's DD.

Payment Information:

Will display the Cycle Fee (How Much the member is paying a month), Payment Type (DD or Paid In Full), Final Payment Date (When their final payment is), Next Payment Due (When their next payment is gone be due), Total Next Payment (How much they have to pay on their next payment) and you have a Collect All option which allows you to collect all the outstanding money from the member if they are on a DD.

Freeze History:

This will show you if the member has any current or future freezes on their account. Here you can delete a freeze, change the end and start date of the freeze and a tick box to Prevent Use to your centre for the freeze period.

Account Activity:

From here you will be able to see a statement showing you the Activity on the member account.

1.2.3.1. ADD NEW BANK DETAILS

To add new bank details to a member please follow these instructions:

- Make sure you have the correct member in Membership Management > Select the Account Details tab > Click the edit button (padlock).
- Select 'Create New Account', this will automatically generate a new bank reference and will change the BACS code to '00 – New not Valid'.
- Enter the account details > Select 'Verify Branch Account' > Select the save button (next to the padlock).
- It is important that you do not manually change the BACS code, it will update accordingly automatically.

Bank Detail		Payment Information		Freeze History	
Name:	<input type="text"/>	Cycle:	Monthly	<input type="text"/>	
Account No:	<input type="text"/>	Payment Type:	Pay in Full	Reason:	<input type="text"/>
Sort Code:	<input type="text"/> - <input type="text"/> - <input type="text"/>	P O S Limit:	£0.00	Start:	<input type="text"/>
Verify Branch Account?	<input type="checkbox"/>	Final Payment Date:	<input type="text"/>	End:	<input type="text"/>
Ref:	<input type="text"/>	Next Payment Due:	N/A	Prevent Use:	<input type="checkbox"/>
Code:	00 - New not Valid	Total Next Payment:	£0.00	Cancel Freeze ?	<input type="checkbox"/>
Create New Account		Collect All:	<input type="checkbox"/>		

Account Activity							
Date	Analysis	Description	Method	Debit	Credit	Balance	0/Standing
18/06/2012	122	Administration Fee	Pay in Full	25.00		£25.00	
18/06/2012	101	1-Other Monthly	Pay in Full	37.00		£62.00	
18/06/2012	111	1-Pro Rata Fees	Pay in Full	16.03		£78.03	
18/06/2012		246924 - POS Payment	Cheque		78.03	£0.00	
18/06/2012	00-001	246939 - Guest Pass 12 for 10	POS Item	7.50		£7.50	
18/06/2012		246939 - POS Payment	Cash		7.50	£0.00	
18/06/2012	00-001	246940 - Gym Usage	POS Item			£0.00	
18/06/2012		246940 - POS Payment	Voucher			£0.00	
18/06/2012	00-001	246941 - Gym Usage	POS Item			£0.00	
18/06/2012		246941 - POS Payment	Voucher			£0.00	

All Dates: From: 21/03/2012 Balance: £0.00

1.2.4. CLUB USAGE

When a member swipes their membership card (including manual swipes) at Front of House or any gates / turnstiles connected to Legend then you can view these swipes on this tab.

The screenshot shows the 'Club Usage' interface. It features a monthly calendar for the year 2012, with navigation arrows for 2011 and 2013. The calendar shows a '1' in the June 2012 cell. To the right, the 'Recent Visits' section displays a single entry: 'Chelmsford - 18/06/2012 12:06:48'. Below this, there is an 'Override' section with dropdown menus for 'Access' (set to 'N/A'), 'Date', and 'Fees' (set to 'N/A'). At the bottom left, a 'Total' row shows '1' for 2012 and '0' for 2011.

1.2.5. CREDIT CONTROL

This will detail if a member has a debt against their account and how long it has been outstanding.

The screenshot displays the 'Credit Control' interface, divided into three main sections: 'Create Event', 'Payment History', and 'Customer Balance'.
- **Create Event:** Includes a 'Category' dropdown set to 'All' and a 'Type' text input field. A 'Create New Event' button is located at the bottom.
- **Payment History:** Shows a 'Status - None' dropdown, 'Num Failures (Yr)' (0), 'Total Failures' (0), 'Current Failures' (None), and 'Next Action Date' (N/A).
- **Customer Balance:** Features an 'Ageing as of' dropdown set to '21/06/2012'. Below it, a table shows ageing periods and their corresponding balances:

1 to 29 Days	£0.00
30 to 59 Days	£0.00
60 to 89 Days	£0.00
90 + Days	£0.00
Credits	£0.00
Ageing Balance	£0.00

At the bottom, an 'Issues' table is visible with columns for Club, Date, Code, Description, and Notes.

1.2.6. MARKETING

This screen populates the information given in the new member wizard the goals and interest of the member. You can edit any of these using the edit (padlock) button.

Member Category	
Member Category	Value
Type1	

Member Interests	
	Interest Description
<input type="checkbox"/>	Beauty
<input type="checkbox"/>	Boxing
<input type="checkbox"/>	Cafe Bar
<input type="checkbox"/>	Cardio
<input type="checkbox"/>	Classes
<input type="checkbox"/>	Creche
<input type="checkbox"/>	Hair Salon
<input type="checkbox"/>	Jacuzzi
<input type="checkbox"/>	Pro Health
<input type="checkbox"/>	PT
<input type="checkbox"/>	Running

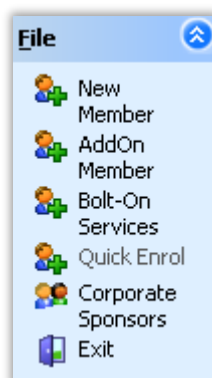
Member Eligibilities	
	Description

Member Goals	
	Goal Description
<input type="checkbox"/>	Gain weight/muscle
<input checked="" type="checkbox"/>	Improve Fitness
<input type="checkbox"/>	Improve Flexibility
<input type="checkbox"/>	Increase Energy
<input type="checkbox"/>	Lose Weight
<input type="checkbox"/>	N/A
<input type="checkbox"/>	Reduce Stress
<input type="checkbox"/>	Rehab
<input type="checkbox"/>	Relaxation
<input type="checkbox"/>	Social
<input type="checkbox"/>	Swimming

1.3. ADDING NEW MEMBERS

New (Head) Member

- To add a new member to Legend > Click on 'File' (located on the left in the function bar) > Select 'New Member' and then follow the instructions below:



- Click next on the first step and on the second step you can select the member's home club.
- Click next once home club has been selected.

- On the next step you will then enter the member's Card Number, Title, Forename and Surname in. The Membership number will be automatically created once filled in then click next.
- The next step is where you will enter the member Personal Details in as Date of Birth, Ethnic Origin etc, click next once completed.
- The following step will ask you to enter the member's Contact Details, you can enter the Postcode in and click on the search button which will show the address's to choose from, click next when done.
- The next step will involve you entering in the Marketing Information, click Next when filled in.
- The following step will ask you to enter in the Medical Information of the member, click next when done.
- On the next step you need to fill in the Membership Agreement Details i.e. Contract Sign Date, Member completed Medical Questionnaire, if the member was referred by another member you will enter the Referring Member number in, then click next. The following step is where you will be asked the Agreement Type, Agreement Pricing and the Payment Method the member is going onto. The Agreement Period is automatically generated for you but this can be changed if required, click next when done.
- The next step will show Eligibilities for the member if any Eligibility has been setup for that agreement, if not it will just be blank; you can just click next on this step.
- If there are any Bolt On Services as towels or locker you will have the option to select the Bolt On if the member requires them, click next when done.
- The next step is where the charges are being created automatically for the agreement i.e. Admin fee, Prorate, Up Front Cycle Fee and Cancellation fee. All these charges can be overwritten if the user has the correct security token. Prorate is automatically calculated, you can just click next on this step.
- The following step is just a confirmation of the member details and the agreement, click next.
- On the next step you have the option to print off the agreement document, to preview the agreement document (if these are configured in your Legend system); you also have a tick box to check if the member has signed the membership form, it is important that you tick this so that the members status is set to Active, click next when done.
- Then on the final step you will be presented with a Final Summary, click on the FINISH tab once reviewed.

Once you have completed the New Member Wizard the members details will automatically populate Membership Management.

You can then search for the member in Front of House and pay off any membership fees that they might have outstanding.

Add On Members

If you use add on members it's important that you create the head member first:

- Search for the head member / head payer using the search box at the bottom of membership management > Click on 'File' (if it's not already expanded) > Select 'AddOn Member'.
- This will open a wizard very similar to the one used to create the head member, you will see that it has already pre-selected 'Add to existing membership...' and has populated who will be paying for the membership.


New Member Wizard

Create new membership or add to existing membership

Please specify if this prospective member is intended to be a part of an existing membership, such as a family membership.

New Membership - Single member or head of a group / family membership.

Add to existing membership - Add to an existing group / family membership.

This membership will be paid by: 

Barlow, Jon

Select Membership

Cancel < Previous Next > Finish

- Click 'Select Membership' > The box below will open > Pick the applicable option from the top drop down menu > Make sure the agreement pricing is correct > Billing Method will always be the same as the head payer.

The screenshot shows a 'Select Membership' dialog box with the following fields and values:

- Options: Select Membership (dropdown menu)
- Agreement Type: Link to the Head Membership (dropdown menu)
- Agreement Pricing: (empty dropdown menu)
- Billing Method: Direct Debit (dropdown menu)
- Cycle Fee: £0.00 (text input field)

Buttons: OK, Cancel

- You can then continue the New Member Wizard to add this member to the head payer.

1.4. AGREEMENT ACTIONS

There are various other wizards in Membership Management that allow you to perform actions to members agreements, these are all located in the function bar under the 'Actions' header and are explained in greater detail in the next section.

Upgrade

Think of the upgrade wizard more of a change wizard in that you can upgrade, downgrade or even renew your membership. Please note that you can only use this action on active members (reactivating members is covered later in this section).

The upgrade wizard works in exactly the same way as the new member wizard that we have already covered, the difference is that it will take you almost straight to the agreement selection screen where you can pick a new agreement for the member.

Once you have completed this action the member will be immediately changed unless you specified a future start date in the wizard. It will also add any outstanding charges to the members account.

Renew

This wizard works in the same way as the upgrade wizard described above but will only start the new membership after the end of the current membership contract. Mainly used for paid-in-full agreements.

Freeze

The freeze wizard allows you to freeze memberships for a specified amount of time, if the member pays by direct debit you will also have a choice to charge the member a smaller monthly fee. These functions vary per site configuration.

Link

If you wish to link existing members together you should use this wizard, useful when you're creating an add on member but they already exist on the system.

Terminate

Use this wizard to lapse members, if you leave the lapse date as today then they will lapse once you complete the wizard and if you select a future date it will lapse at midnight the day before.

ReActivate

A very quick way of reactivating a lapsed / terminated member, please make sure you use the upgrade wizard afterwards to upgrade / change / renew their membership.

UnLink

This will unlink the selected member from the head member and will automatically lapse the agreement.

1.5. UPGRADE WIZARD

To change a members agreement (upgrade or downgrade) you should use the Upgrade Wizard.

- First load the member you wish to change into Membership Management.
- From the action bar on the left side of the application select 'Upgrade'.
- Click next through the wizard, you will notice this is the same process as the new member wizard except that it skips a few steps.
- Once you reach the agreement screen you can change the members agreement and start date for the new agreement.
- If you do not change the date and leave it as todays date, then the change will take effect as soon as you finish the wizard.
- You will have an option to review the fees and override them if you have the relevant security token.

1.6. RENEW WIZARD

To renew a members agreement (if using the same billing method such as paid in full > paid in full) you should use the Renew Wizard.

- First load the member you wish to renew into Membership Management.
- From the action bar on the left side of the application select 'Renew'.
- Click next through the wizard, you will notice this is the same process as the new member wizard except that it skips a few steps.
- Once you reach the agreement screen you can change the members agreement and start date for the new agreement.

- If you do not change the date and leave it as today's date, then the change will take effect as soon as you finish the wizard.
- You will have an option to review the fees and override them if you have the relevant security token.

1.7. FREEZE WIZARD

Legend offers the ability to freeze a membership for a set period of time. This is primarily used for freezing direct debit membership payments to a set cycle fee.

Please bare in mind that you cannot freeze a member that has any outstanding debt or is pending / lapsed / terminated.

- From the action bar on the left side of the application select 'Freeze'.
- This wizard will ask for a freeze reason and a freeze type.
- Next it will ask for how long you wish to freeze the member (in months), it will ask for a cycle fee to be entered (depending on configuration this might already be pre-set).
- You have the option to allow or deny access to the club during freeze, if you allow access to the club while frozen, no message will appear when the member swipes in through FOH. If they are not allowed access then a message will appear on the Member Control screen in FOH and they will be denied access through any gates / turnstiles.

For a direct debit payer you can see if you freeze has been actioned correctly by selecting 'Fwd Billing' under the Accounts tab located to the left side of the application. It will show you which months have been effected and what the cycle fee has been changed to.

To cancel a freeze go to the Freeze History section on the Account Details tab and click Cancel Freeze, press the cross on the top left hand side and you can then chose a date a reason why you're cancelling the freeze.

Freeze History

Reason:

Start:

End:

Prevent Use:

Cancel Freeze ?

1.8. LINK WIZARD

The Link Wizard will be used to Link two membership accounts together. Within the wizard you will have two different options, Add On and Linked.

Add On - You will use this option to Link two members together, both members can be on separate agreements and you will have the head member paying for both agreements.

Linked - This option will be used to once again Link two member accounts together but the difference is that both members will need to be on the same agreement, the head member will be paying for both agreements

1.9. TERMINATION WIZARD

The Termination Wizard will allow you to lapse a member immediately or on a future date of your choice.

- From the action bar on the left side of the application select 'Terminate'.
- Click through the wizard to select a termination reason & termination date.
- You will be asked if you wish to lapse the member or terminate, best practice is to leave this option set at the default setting of 'lapse'.

1.10. REACTIVATE WIZARD

The ReActivate wizard will allow you to reactivate a lapsed, cancelled or terminated member.

- From the action bar on the left side of the application select 'ReActivate'.
- This is a very simple wizard where all you are required to do is click next and then finish.
- Once you have reactivated a member it's important to remember to then upgrade or renew their membership.

1.11. UNLINK WIZARD

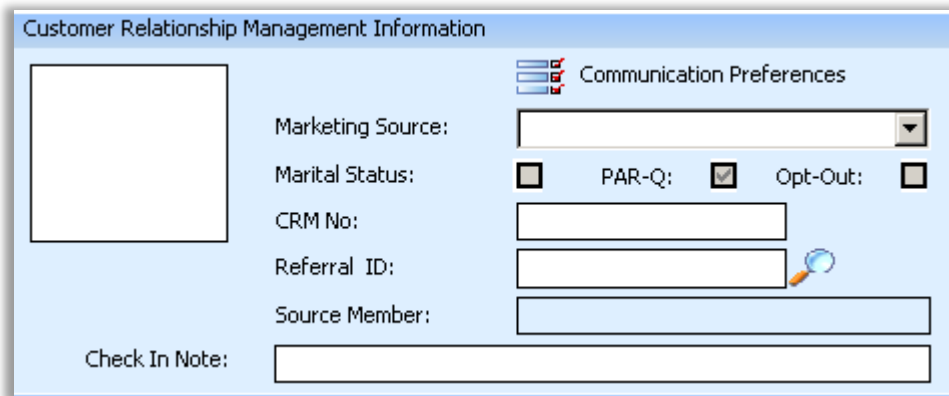
The Unlink wizard will allow you to unlink an add on or linked member from the head member.

- From the action bar on the left side of the application select 'Unlink'.
- It is important that you make sure you have the member you wish to unlink already loaded in membership management, if you wish to double check you will see the membership number and member name along the top bar of the Membership Management application.
- This is yet again a very simple wizard where all you're required to do is click next and finish to confirm the unlink.

1.12. OTHER NOTEABLE MEMBERSHIP MANAGEMENT FUNCTIONS

1.12.1. CHECK IN NOTE

If you wish to add a permanent note to a members account you can use the padlock to unlock the various fields and you can enter a note into the Check In Note box. This will appear on the Member Control screen of Front of House until it is removed from this field. Remember to click the save icon once you've entered / edited your note.

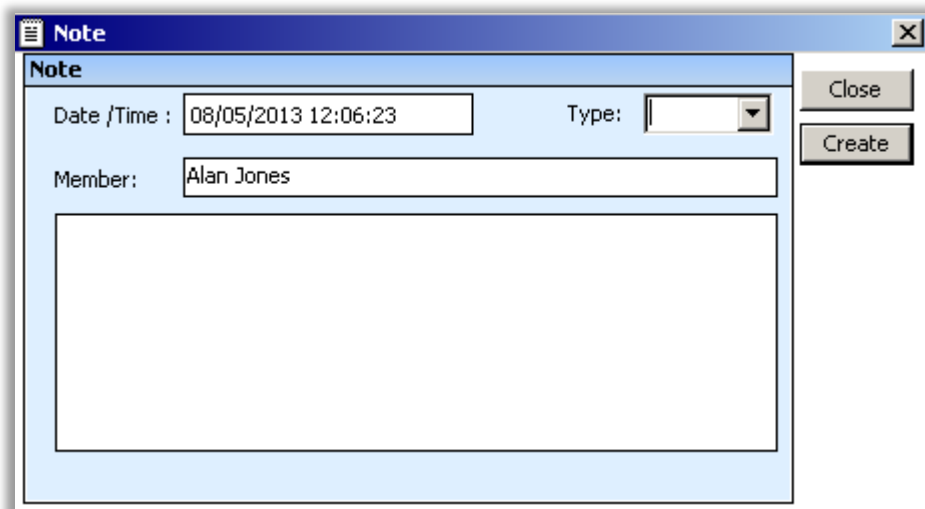


The screenshot shows a window titled "Customer Relationship Management Information". On the left is a large empty rectangular box. To its right are several fields: "Marketing Source:" with a dropdown menu; "Marital Status:" with a checkbox; "PAR-Q:" with a checked checkbox; "Opt-Out:" with an unchecked checkbox; "CRM No:" with a text input field; "Referral ID:" with a text input field and a magnifying glass icon; and "Source Member:" with a text input field. At the bottom left is a "Check In Note:" label followed by a wide text input field. In the top right corner, there is a "Communication Preferences" section with a small icon.

1.12.2. ADDING A NOTE

You can add a note to a members account that can only be seen within Membership Management. These appear under Comms > Events.

To add this Select Comms > Note > Enter your note and click Create.



The screenshot shows a dialog box titled "Note". It has a "Date /Time" field containing "08/05/2013 12:06:23" and a "Type" dropdown menu. Below these is a "Member:" field containing "Alan Jones". A large empty text area is provided for entering the note. On the right side of the dialog, there are "Close" and "Create" buttons.

Another way to add a note is to simply put the page into edit mode and then add a note under the agreement tab. However, this wont date stamp or be traceable if someone changes or deletes it.

1.12.3. EVENTS

Comms > Events

Here you can see any event that has occurred on a members account such as a member swipe, change of agreement, booking made. It can all be seen in this area. You can also double click an event line and it will provide more details such as which user performed the action, at what time and date.

Events are also searchable on the criteria below:

- Resolved / unresolved
- Specific time frame
- By category – bookings / billing / system / communication / other

1.12.4. CLEAR DEBT

If for any reason you need to clear a members debt for membership fees, booking / course charges you can select Accounts > Payments.

- Simply select the line/s you wish to clear debt for, these will then be highlighted in blue and you'll notice that the 'Amount' section will automatically populate.
- Don't change the 'Type' field.
- You may change the 'Analysis' field, when you clear a debt it will be cleared against this GL / Nominal code so that you can report on it.
- Type in a note to say why you're clearing the debt.
- Click 'Apply Payment'

The screenshot shows a software window titled 'Payments' with a menu bar containing 'Payment', 'Credit', 'Refund', and 'UnAllocated Credits'. The main area is divided into two panes. The left pane has tabs for 'Member Charges', 'Booking Charges', 'Course Charges', and 'Group Activity Charges'. Under 'Member Charges', there is a table titled 'Transactions' with the following data:

InvNo	Sale Date	Description	Invoice	Total	Balance
25246	26/04/2013	Memberships		£34.52	£34.52

The right pane is titled 'Payment' and has a sub-tab 'Credit Card'. It contains several input fields: 'Amount' (set to £34.52), 'Type' (set to 'Account'), 'Date' (set to 09/05/2013), and 'Analysis' (set to 'Membership Fee Payment 12-002'). Below these are 'Open Credits' (£0.00) and 'Current Balance' (£34.52). There is a 'Ref:' text box and two buttons: 'Point-of-Sale' and 'Apply Payment'. A 'Close' button is located at the bottom right of the window.

1.12.5. RAISE A CHARGE

If you wish to raise a charge against a members account select Comms > Charges

- Type in a note as to why you're raising a charge (this will be logged in events).
- Enter an amount.
- Choose an Analysis code to set the debt against.
- Select 'Apply Charge'.
- You will now see this debt in Front of House and can pay for it there.

If you were to select 'Apply Charge and Pay' it will apply the charge and then open the Payment window to clear the debt.

The screenshot shows a software window titled "Raise a Charge". The window is divided into two main sections: "Membership Details" and "Charge".

Membership Details:

- Number: 008211
- Name: 008211 - Jones, Alan
- Agreement: (empty field)
- Account Balance: £34.52

Charge:

- Note: (empty text area)
- Amount: 00.00
- Analysis: (dropdown menu)

On the right side of the window, there are three buttons: "Close", "Apply Charge", and "Apply Charge and Pay". A "Help" button is located at the bottom right of the window.

1.12.6. STATEMENT

The statement can be found by selecting Accounts > Statement.

In here you can view a history of:

- Membership Fees
- Secondary Spend
- Bookings
- Credit Notes

You also have the option to print a page of the statement if required.

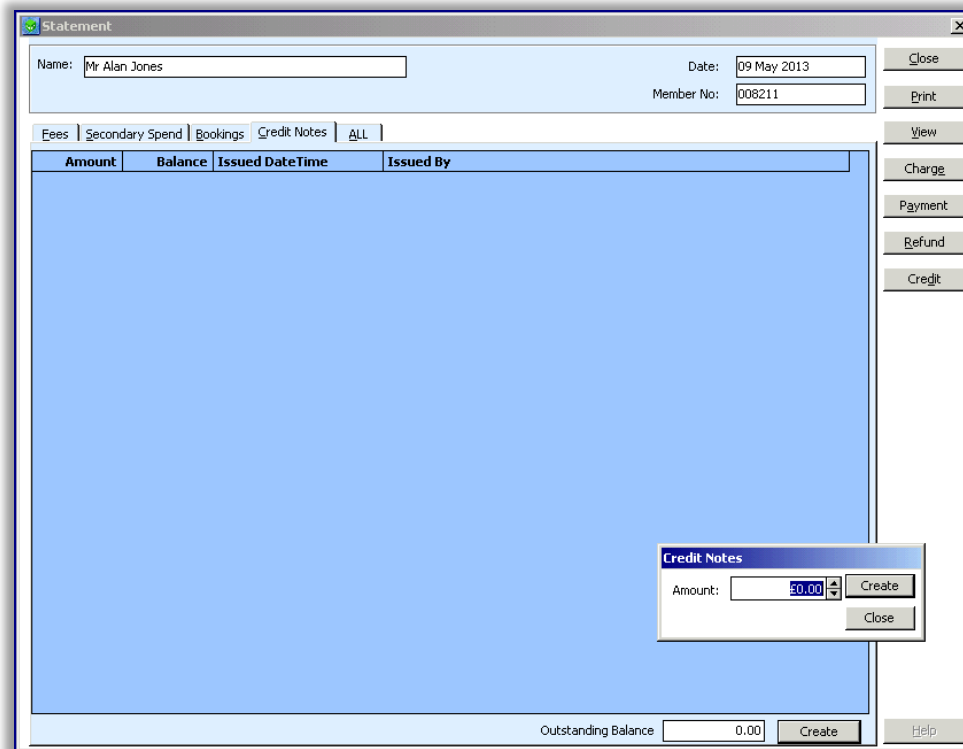
Please note it is not advised to use the 'Credit' or 'Refund' buttons. There are better ways of doing this as described in previous sections.

1.12.7. CREATE A CREDIT NOTE

When in the members Statement > Select 'Credit Notes' tab > Click 'Create' that's located towards the bottom right.

A box will appear asking for an amount and a reason (if reasons are configured in your Legend system), enter your amount and click create.

To clear a credit note simply click the credit note line that has been created, on the popup box select 'Clear'.



1.12.8. ACCOUNT SEARCH

Accounts > Acc Search

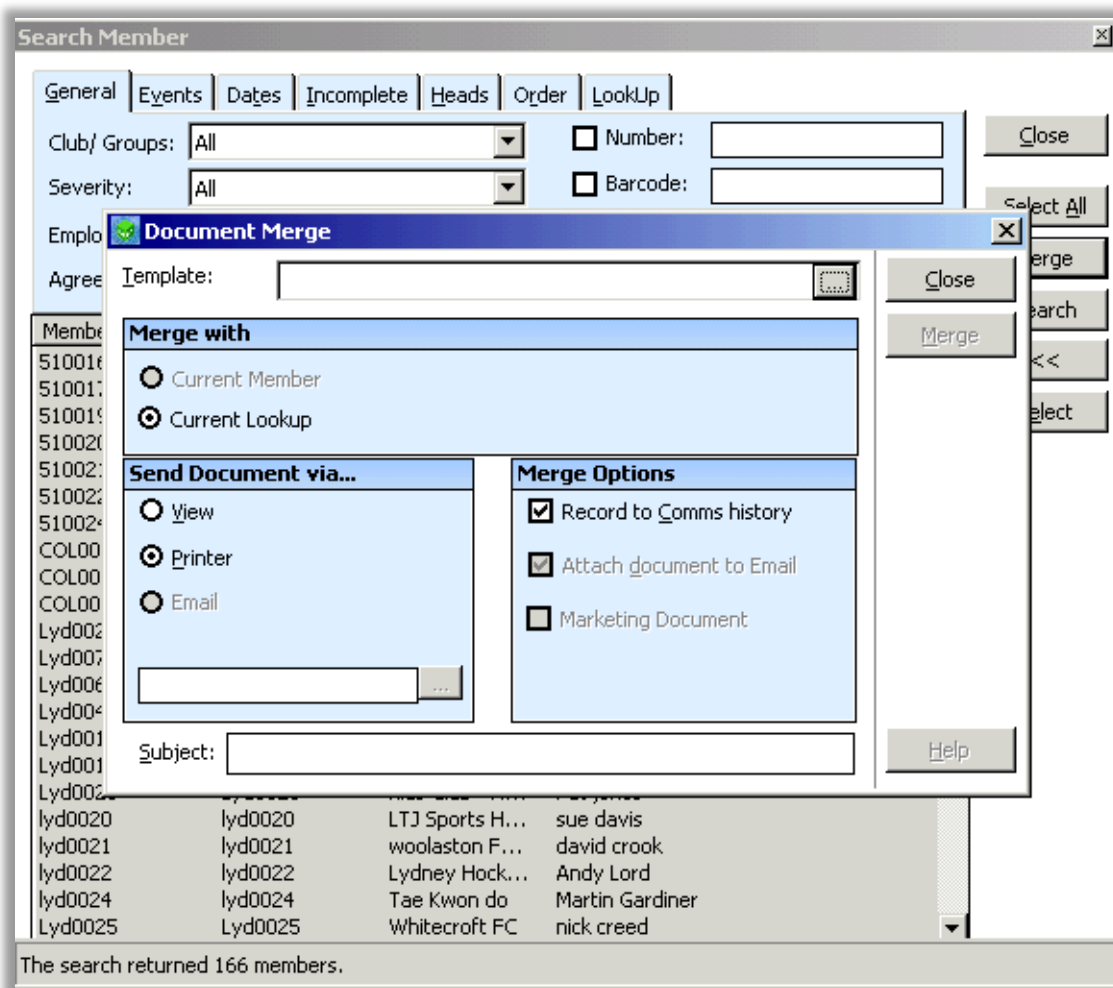
This allows you to search for members that use specific bank details, used mainly to check for duplicate accounts.

1.12.9. ADVANCED SEARCH AND MAIL MERGING

The little man icon holding the magnifying glass at the top of the screen in Member Management allows you to perform an advanced search for members.

Mail Merge can also be done from the advanced search. In order to do this input your search criteria and click on search, you must then click on select all and then merge.

Once the mail merge box has opened choose the template you wish to use by clicking on the template box with the three little dots. You can then either view the documents or print them. If you tick to 'Record to Comms history' then the letter will be recorded for future audit purposes within Events.



1.12.10. DIRECT DEBIT FUTURE PAYMENTS

Accounts > FWD Billing

Only used for direct debit payers, it will show the next 2 years of monthly billing, very useful if you have applied a freeze to a members account and you wish to see if you have applied it correctly or even to print and give to the member.

1.12.11. ONLINE ADMIN

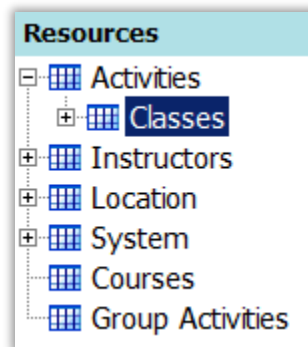
If you take advantage of Legend Online Services then you'll be able to link or unlink an email address to a members account and reset their password.

2. LEGEND BOOKINGS

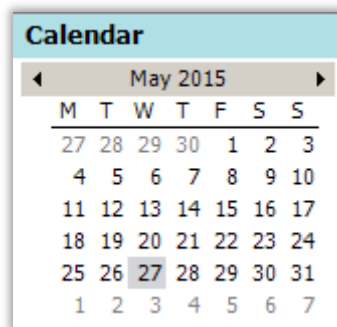
2.1. OVERVIEW

The Legend Bookings application is where you can schedule & configure classes, activities & courses.

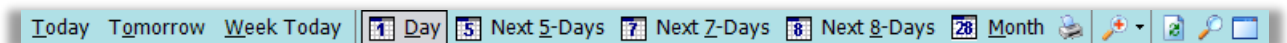
The Resources section represents the booking structure that will be viewed in Front of House Bookings, for example Classes will always be under Activities > Classes and your Ad-Hoc activities will always be bookable directly into the location.



You will also notice the calendar, this is the quickest way to navigate to a specific date.



Along the top of the booking timetable you can change your timetable view.



2.2. CLASSES

2.2.1. SCHEDULE A CLASS

Navigate in the Resources section to Activities > Classes > Select a class.

You'll notice that when you select a class that the timetable will no longer be grey and will be highlighted in orange. If the time table is ever grey it means that either the time is in the past or the class is setup not to be bookable on that day at that time.

Reservation: AbBlast - 13/07/2015 16:00

Reservation Name:

Resource:

Resource Notes:

Reservation Notes:

Start Time:

Duration: minutes

Reference No: [HideDetails](#)

Linked Resources:

Status:

Bookings Recurrence Waiting List Advanced

None
 Daily
 Selected Dates

Daily
 Every day(s)

Range of recurrence
 End After: occurrence(s)

Course Attendee Locked Group Activity Attendee * Online Booking

OK Cancel

2.2.3. AMENDING A CLASS

21/02/2012 (Today)	
11:15	
11:30	
11:45	
12:00	
12:15	
12:30	
12:45	
13:00	13:00-13:45 Zumba (0/22)
13:15	
13:30	
13:45	
14:00	
14:15	
14:30	
14:45	
15:00	
15:15	
15:30	
15:45	
16:00	

Once the booking has been created it will appear on the booking sheet.

You can amend the time, date, duration, capacity and inventory item by double clicking on the booking.

Make any changes then click onto the 'Advanced' tab, here you will see that you can then apply these changes to just this booking, X amount of bookings or all future instances.

Make your choice then click OK to apply the changes.

2.2.4. RECALLOCATING A BOOKING

If you need to change a location of a booking or an instructor right click on the booking and select 'Reallocate Booking'. You can then change to the required area or instructor. This can be applied for only this one instance, all future instances or for a certain number of instances.

Select Update to confirm your changes.

Please note that you can only update one line at a time.

Re-allocate

Linked Resource: Change to: Update

Primary Resource: Change to: Update

Recurrence Options

Only this Instance

All future instances (Event only)

instance(s) (Event only)

Total Instances: 51
Total Event Instances:
Current Instance: 23
Current Event Instance:

Close

2.2.5. CANCELLING A CLASS

- Double click on the class you wish to cancel (or the first instance if cancelling multiple).
- Change the Status box to Cancelled.
- Select the Advanced tab.
- Choose if you wish to cancel just this instance, X number of classes or all future instances.
- Select OK.
- You will receive a prompt asking if you've informed anyone booked onto the class that you're cancelling it, select Yes.
- Another prompt will appear to make sure you definitely want to cancel, select Yes.

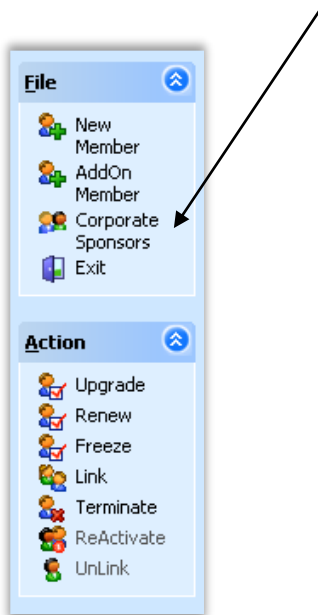
2.3. BLOCK BOOKINGS

2.3.1. CREATE A BLOCK BOOKING MEMBER (CORPORATE SPONSOR)

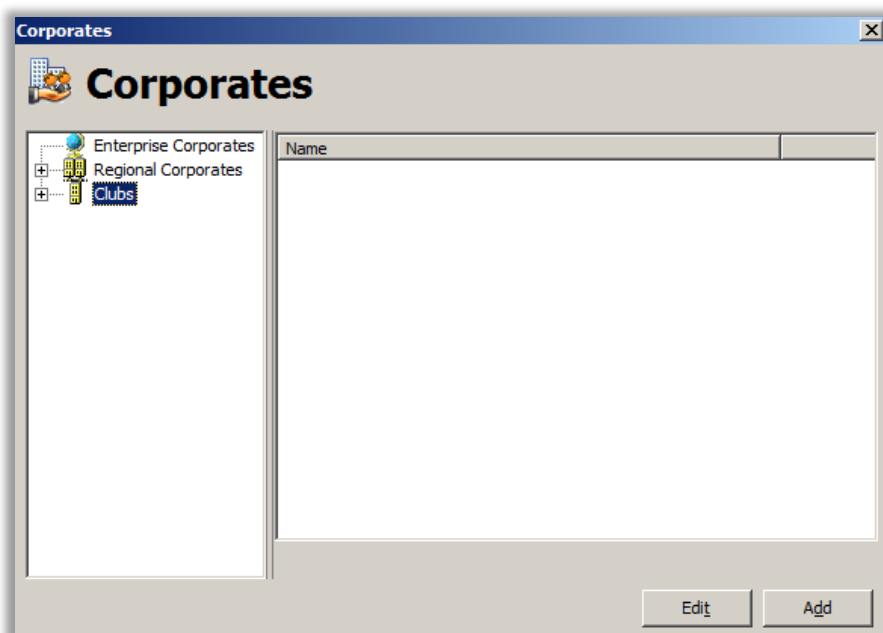
Before creating a block booking you must have a block booking member, this is usually the name of the group that would be making the booking such as Manchester Swim Club etc.

To create a new Block Booking member:

- Open Membership Management
- Select File > Corporate Sponsors



- Here you will see any existing Block Booking members, by default you will view the Enterprise members, you can select to view the regional or club specific members using the tree on the left.



- Select 'Add' to create a new member.

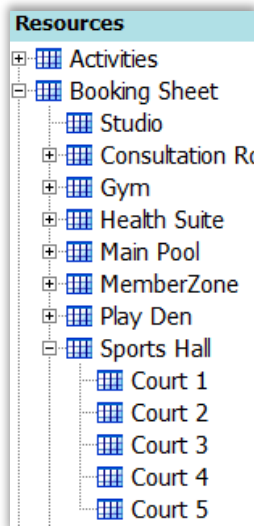
- Enter a Name and Alt Code, the Alt Code is usually the same as the name however can be used for anything you wish.
- ALWAYS tick Booking Corporate, if you do not do this then you will not be able to use this member for a Block Booking.
- Fill out the details on the Contact Details tab.
- Click OK.

It's usually best practice to prefix the Name field with "BB –" when you search for this member you can simply then just type in BB and all of your block bookers will appear first in the search.

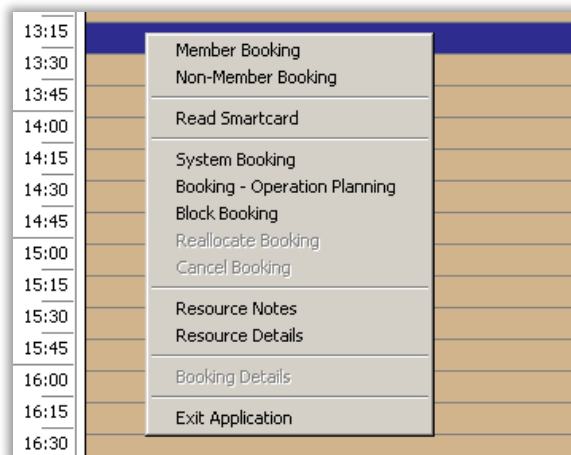
2.3.2. CREATE A BLOCK BOOKING

You can make a block booking for anything that isn't a class, such as badminton in a sports hall or a spa treatment with a therapist.

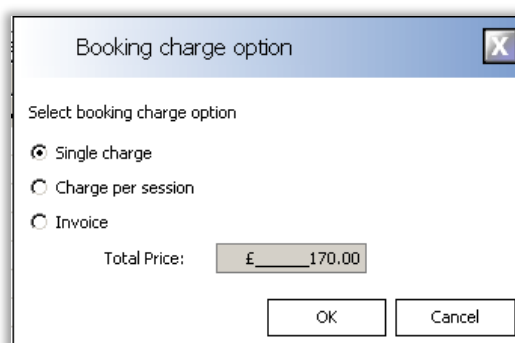
- In Legend Bookings browse in the resource tab to 'Location' or 'Booking Sheet' (some clubs have this named differently).
- When you expand this tree you will see all of the physical resources available at your club, if you expand if further you will see the specific areas of those physical resources.



- You can click on the header or an individual area to load the booking sheet for that specific resource.
- **RIGHT CLICK** on the time you wish to book select **BLOCK BOOKING** and a member search will appear, ONLY your Block Booking members will appear in this search, if normal members appear then you haven't right clicked and selected block booking.



- Select the member you wish to make a booking for and the usual booking screen will appear.
- Select the 'Recurrence' tab and enter the duration of the booking.
- Click OK once you have completed your selections.
- If there is a cost associated with the inventory item linked to the activity then a pop up box will appear asking how to charge the member, you will have 3 options.



- Single Charge – This will total up the whole cost of the booking and add a lump sum of this debt to the members account.
- Charge Per Session – Will split the cost into a price per session.
- Invoice – This will not invoice the member, it is used to override the price of a booking. For example, if you're creating a 10 week booking and enter £100 into the Invoice field, it will divide this amount by however many sessions that you're booking, in this case it would charge the member £10 per week.
- Click OK, once you've made your selections and Yes to any further prompts to create & confirm the booking.

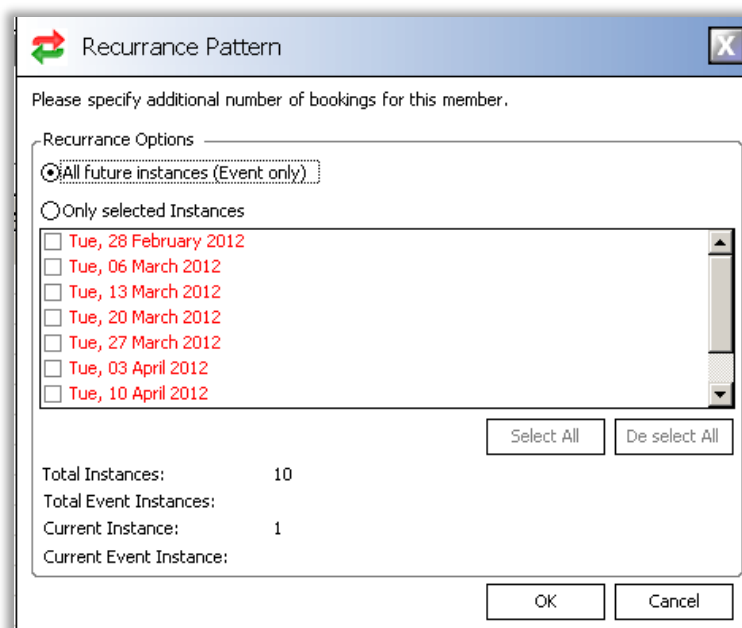
If you have created your booking correctly it will display the Corp icon and look like below.



2.3.3. CANCELLING A BLOCK BOOKING

Cancelling a block booking differs slightly from cancelling a class or normal activity.

- Double click on the first instance of the booking you wish to cancel.
- Select the member that is booked in.
- Select 'Cancel Booking'.
- A popup will appear asking which sessions you wish to cancel. Make your choice and then Click OK.



- You'll notice that the member is no longer in the booking and the status has changed to Cancelled, click OK to confirm you wish to cancel and yes to any further prompts.
- If you do not cancel a block booking this way it might leave the debt on the account.

2.3.4. PAYING A DEBT

Paying a members debt for a block booker is the same as paying debt for any member.

- Open Legend Front of House.
- Search for the block booking member.
- In the member passport select 'Member Info'.
- The screen below will appear, select the green 'Billing' icon on the left side to display any outstanding debt the member owes.

Billings (22)		Refunds (0)	Future Billings (0)	Invoices (0)	Future Invoices (0)
	Description	Invoice	Method	Date Posted	Balance
<input checked="" type="checkbox"/>	R9327, General Gym Use Booking Date: Tuesday, 27 Nov 2012 19:00 Gymnasium Hire.		Booking	25/11/2012	£19.75
<input type="checkbox"/>	R9327, General Gym Use Booking Date: Tuesday, 19 Dec 2012 19:00 Gymnasium Hire.		Booking	02/12/2012	£11.52
<input type="checkbox"/>	R9327, General Gym Use Booking Date: Tuesday, 22 Jan 2013 19:00 Gymnasium Hire.		Booking	28/12/2012	£34.55
<input type="checkbox"/>	R9327, General Gym Use Booking Date: Tuesday, 23 Apr 2013 19:00 Gymnasium Hire.		Booking	10/03/2013	£34.55
<input type="checkbox"/>	R9327, General Gym Use Booking Date: Tuesday, 30 Apr 2013 19:00 Gymnasium Hire.		Booking	10/03/2013	£34.55
<input type="checkbox"/>	R9327, General Gym Use Booking Date: Tuesday, 07 May 2013 19:00 Gymnasium Hire.		Booking	10/03/2013	£34.55
<input type="checkbox"/>	R9327, General Gym Use Booking Date: Tuesday, 14 May 2013 19:00 Gymnasium Hire.		Booking	10/03/2013	£34.55
<input type="checkbox"/>	R9327, General Gym Use Booking Date: Tuesday, 21 May 2013 19:00 Gymnasium Hire.		Booking	10/03/2013	£34.55
<input type="checkbox"/>	R9327, General Gym Use Booking Date: Tuesday, 28 May 2013 19:00 Gymnasium Hire.		Booking	10/03/2013	£34.55
<input type="checkbox"/>	R9327, General Gym Use Booking Date: Tuesday, 04 Jun 2013 19:00 Gymnasium Hire.		Booking	10/03/2013	£34.55
<input type="checkbox"/>	R9327, General Gym Use Booking Date: Tuesday, 11 Jun 2013 19:00 Gymnasium Hire.		Booking	10/03/2013	£34.55
<input type="checkbox"/>	R9327, General Gym Use Booking Date: Tuesday, 18 Jun 2013 19:00 Gymnasium Hire.		Booking	10/03/2013	£34.55
<input type="checkbox"/>	R9327, General Gym Use Booking Date: Tuesday, 25 Jun 2013 19:00 Gymnasium Hire.		Booking	10/03/2013	£34.55
<input type="checkbox"/>	R9327, General Gym Use Booking Date: Tuesday, 02 Jul 2013 19:00 Gymnasium Hire.		Booking	10/03/2013	£34.55
<input type="checkbox"/>	R9327, General Gym Use Booking Date: Tuesday, 09 Jul 2013 19:00 Gymnasium Hire.		Booking	10/03/2013	£34.55
<input type="checkbox"/>	R9327, General Gym Use Booking Date: Tuesday, 16 Jul 2013 19:00 Gymnasium Hire.		Booking	10/03/2013	£34.55
<input type="checkbox"/>	R9327, General Gym Use Booking Date: Tuesday, 23 Jul 2013 19:00 Gymnasium Hire.		Booking	10/03/2013	£34.55
<input type="checkbox"/>	R9327, General Gym Use Booking Date: Tuesday, 30 Jul 2013 19:00 Gymnasium Hire.		Booking	10/03/2013	£34.55
<input type="checkbox"/>	R9327, General Gym Use Booking Date: Tuesday, 06 Aug 2013 19:00 Gymnasium Hire.		Booking	10/03/2013	£34.55
<input type="checkbox"/>	R9327, General Gym Use Booking Date: Tuesday, 13 Aug 2013 19:00 Gymnasium Hire.		Booking	10/03/2013	£34.55
<input type="checkbox"/>	R9327, General Gym Use Booking Date: Tuesday, 20 Aug 2013 19:00 Gymnasium Hire.		Booking	10/03/2013	£34.55
<input type="checkbox"/>	R9327, General Gym Use Booking Date: Tuesday, 27 Aug 2013 19:00 Gymnasium Hire.		Booking	10/03/2013	£34.55

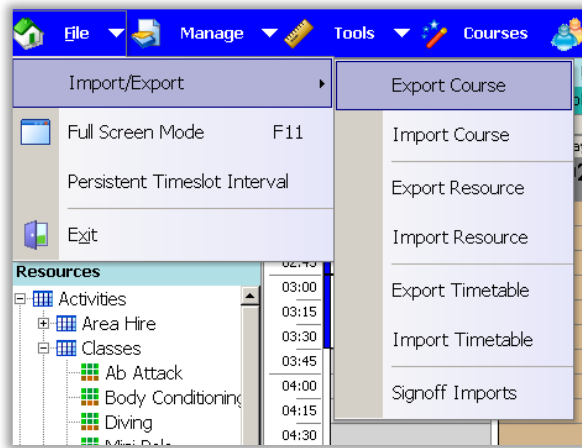
- Select the debt you wish to pay for and make your payment option to the right, you can part pay, pay or pay all.
- This will add the debt to the basket for you to pay off like any other transaction.

2.4. EXPORTING & IMPORTING COURSES

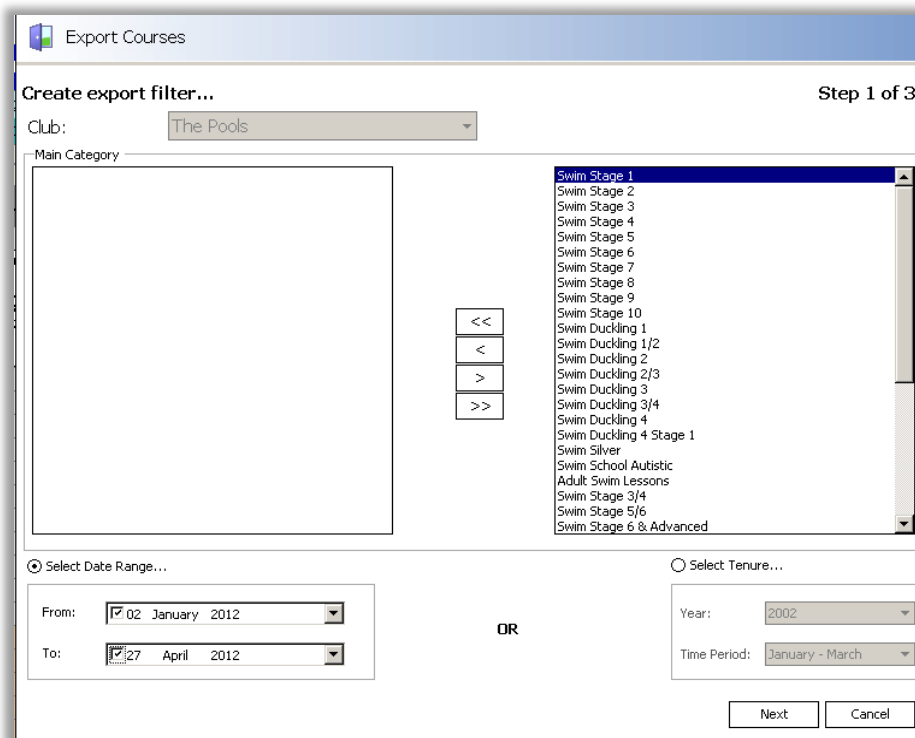
2.4.1. EXPORTING COURSES

Before we can create a new term for a course we must export them in order to create a template.

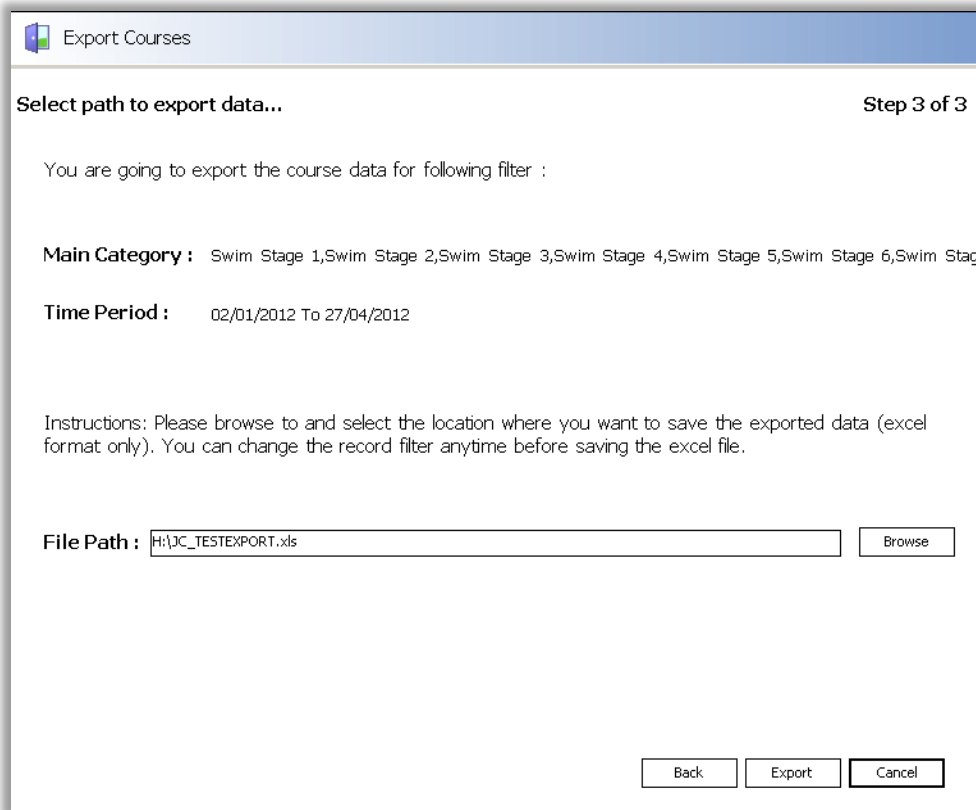
- Open Legend Bookings
- Select File > Import/Export > Export Course



- Add the courses you wish to export to the right hand box using either the > icon or >> to move all.
- Adjust the dates to capture the data from the previous courses in that date period.



- Select Next .
- The file path is asking you where you wish to save the file, you can save this onto the I:\ drive within Legend. Select Browse and choose the folder you wish to save it then name your export file.
- Select Export.



- You should now minimise Legend Bookings so that you're on the Legend desktop.
- Open the 'Computer' icon and browse to the location you saved the file to open it up.

Course Term	Event	Resource	Linked Resources	Dr
Term 1 2012	15:30 Stage 1	10m Pool 1	Unknown Instructor;	Sw
Term 1 2012	17:00 Stage 1	10m Pool 1	Unknown Instructor;	Sw
Term 1 2012	16:30 Stage 1	10m Pool 1	Unknown Instructor;	Sw
Term 1 2012	15:30 Stage 1	10m Pool 1	Unknown Instructor;	Sw
Term 1 2012	16:30 Stage 1	10m Pool 1	Unknown Instructor;	Sw
Term 1 2012	17:30 Stage 1	10m Pool 1	Unknown Instructor;	Sw
Term 1 2012	13:30 Stage 1	10m Pool 1	Unknown Instructor;	Sw
Term 1 2012	16:00 Stage 1	10m Pool 1	Unknown Instructor;	Sw
Term 1 2012	10:00 Stage 1	10m Pool 1	Unknown Instructor;	Sw
Term 1 2012	09:00 Stage 1	10m Pool 1	Unknown Instructor;	Sw
Term 1 2012	16:00 Stage 2	10m Pool 1	Unknown Instructor;	Sw
Term 1 2012	16:30 Stage 2	20m Pool 1	Unknown Instructor;	Sw
Term 1 2012	17:30 Stage 2	10m Pool 1	Unknown Instructor;	Sw
Term 1 2012	13:00 Stage 2	10m Pool 1	Unknown Instructor;	Sw
Term 1 2012	16:00 Stage 2	10m Pool 1	Unknown Instructor;	Sw
Term 1 2012	17:00 Stage 2	10m Pool 1	Unknown Instructor;	Sw
Term 1 2012	16:00 Stage 2	10m Pool 1	Unknown Instructor;	Sw
Term 1 2012	17:00 Stage 2	10m Pool 1	Unknown Instructor;	Sw

- Here you can change various details such as the name of the course, term, linked instructors, inventory item etc.

- To prepare the document for importing the start date of the terms must be changed to the new term dates.

Start Date
09-Apr-12
09-Apr-12
09-Apr-12
10-Apr-12
10-Apr-12
10-Apr-12
11-Apr-12
11-Apr-12

- Make sure you delete any lines that you don't wish to import then Save & close the file.

2.4.2. IMPORTING COURSES

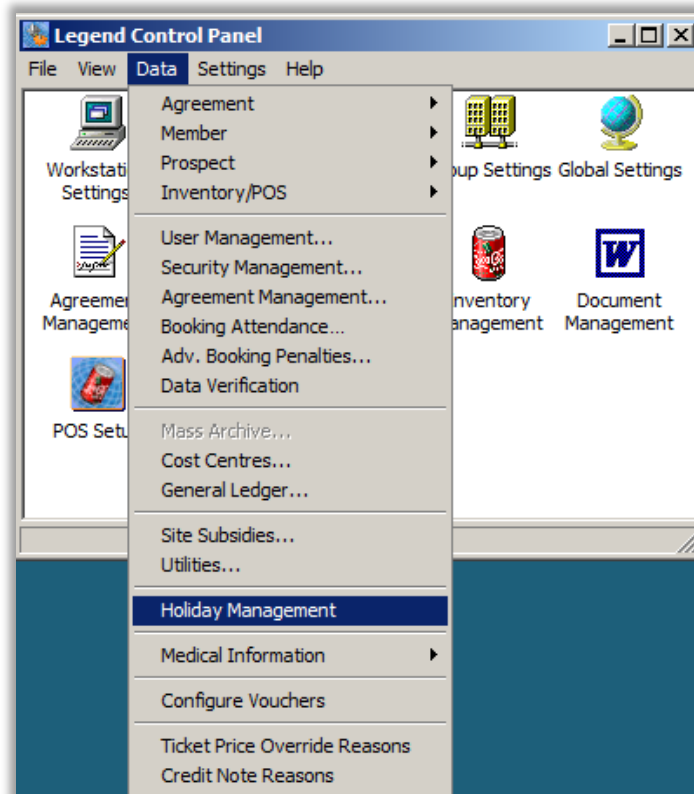
- Open Legend Bookings
- Select File > Import/Export > Import Course
- Use the Browse button to find the template that you have just completed.
- Select 'Next' then Select 'Process'.
- This will now check for any errors, a message will appear in green to say the file has been successfully processed if there are no issues, if there are issues it will tell you which line the error is on so that you can go back to your excel template and correct the mistake.
- If your file was processed successfully click 'Next' and then select 'Finish'.

If you attempt to double book a physical resource or instructor a message will appear to inform you the specific resource, date and time so that you may go correct this.

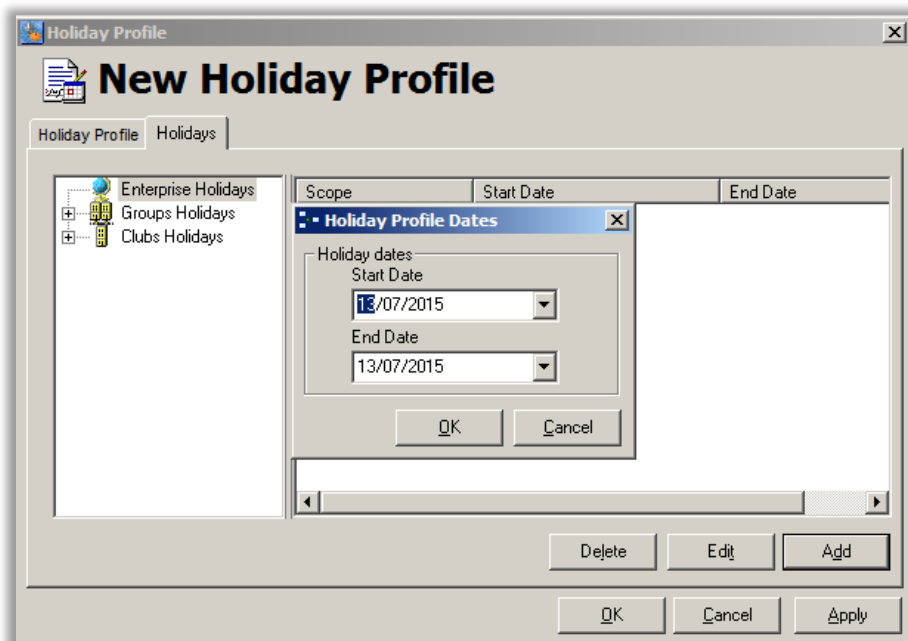
2.5. HOLIDAY MANAGEMENT

Holiday Management allows you to remove selected day from being bookable for days you are closed such as Christmas day.

- Open Legend Control Panel.
- Select 'Data' > Holiday Management.



- Select New to create a new holiday profile.
- Give the profile a name then select the 'Holidays' tab.



- You can now add in dates on an Enterprise, Group (region) or Club specific level.
- Once all of your dates have been added click OK.
- You might need to close and reopen Legend Bookings to see the changes.

3. REPORTING

Legend Reports presents in a tree-view format with category folders and sub-folders of report types and reports. This ensures that you can quickly find a report despite there being many to choose from. There is also a 'My Reports' folder where you can save the reports that you most commonly run.

3.1. RUN A REPORT

To generate a report, simply follow the steps below:

- Open the Legend Reports application. To do this, select the Reports Icon on your desk-top view.
- Select the category that you want by selecting the relevant folder; for instance, if you want to find a Problem Swipe Report, then select the folder OPERATIONS.
- Select the sub-category or report type that you want by selecting the appropriate description within the list in the folder. For instance under OPERATIONS, you may select *DAILY REPORTS*.
- Select the report folder type that you want, for instance OPERATIONS/*DAILY REPORTS/Problem Swipes*.
- Either select 'Run' for a standard daily report, or be specific with the range [for example, selecting only those members who pay by Direct Debit].
- You can also select selection parameters that you want, using the selection tab. For instance you may want to run the report for a date range, or for yesterday, or for a future date. Similarly, you may want it to include new fields or data. Select [Run].
- The report will be generated in an Excel view. If you want to work on it further then select the Excel Write option [located on the toolbar], which converts it to a standard Excel document for you to save, print or format.

3.2. SAVE A REPORT (MY REPORTS)

If you have several reports that you use on a regular basis, you can save these under My Reports, thus eliminating the need to navigate and alter the parameters every time.

- Prepare your report as normal (selecting those parameters you require)
- There is no need to run the report, simply go to **File > Save**, you will then be asked to specify a name for this report.
- Enter a relevant name for the report and hit **Save**
- The report is now accessible every time you log on to reports underneath My Reports (the first tree in left hand frame)

3.3. CUSTOMISING EXISTING REPORTS

Legend Reports enables you to include the specified columns you would prefer to see in your report.

To include customized columns

- Select the report you wish to run.
- Open the **Tools** menu and click **Customise Columns**. This is also the best way to see what is included inside a report.
- You will be presented with a dialogue box. On the left you will be able to view all the columns available to be included in your report. The right will display columns already included.
- To select additional columns, select the **name of the column** on the left and then select the [Add] button.
- Click [Ok] and run your report as normal.

By using new Range and Selection Parameters, many new reports can be generated from existing reports.

EXAMPLE: RUNNING A PROBLEM SWIPES REPORT

- Open application by selecting Legend Reports icon on desktop
- Select Operations Folder and select Problem Swipe sub-folder from the list on the left.
- Select 'RUN' if you are happy with the range and selection parameters defaulted [most often the report will be ready to run].
- Alternatively, select the Range and Selection parameters yourself. First select the Range tab at the top of the screen. Then choose the range in the dialogue box that appears (for example, you could choose only bronze members)
- Then select the Selection tab at the top of the screen. Select the parameters you want from the dialogues (for example, you could specify only male members)
- Select 'Run' once you have made your selections.

The completed report is produced. If you wish to convert it to Excel Worksheet for printing, or formatting or saving, then select the Excel icon which can be found on the toolbar at the top of the screen.

3.4. RUN A REPORT FOR MAIL MERGE

- Prepare your report as usual and select the **Run** button.
- Select **Run for Merge** from the **Reports** menu.
- You will be presented with a **Reports Merge Wizard**. Select ALL by selecting the 'Merge All' check box at the bottom of the screen. Alternatively, highlight the specific members in the list to be included in the merge. Click [Next]
- Select the **Template** to merge to, insert a **Regarding** (to be displayed in member communications) and then select either to **View, Print, Email** or **Save** the file.
- Select the **Merge** button and the records will be merged to the required template.

3.5. SCHEDULE REPORTS

Legend Reports enables you to schedule reports to run automatically at pre-planned intervals. The reports can either be saved to a central folder or alternatively the reports can be emailed automatically to a predefined list of recipients.

To schedule a report to run automatically

- Prepare your report as normal but rather than selecting **Run** do the following:
- Select **Schedule** from the **Special** menu.
- You will be presented with a **Schedule Reports** dialogue box from which you can edit current scheduled reports or add new reports
- Select Add New
- Give the scheduled report a name and tick the **Enable Schedule** box
- Select the other criteria according to your requirements and choose a location on the server in which to copy the folder to
- Windows scheduler now needs to be configured to set up the tasks (you can define such settings as the day, frequency, duration and desired output)
- When you are happy with the scheduled report, click [Ok] to save it

Popular Reports are:

- Category Summary Report – allows you to look banking for certain days
Standard – POS Reports – Category Summary
- Income Journal – Allows you to look at the banking for certain time period under different categories
Standard – Financial Report – Income Journal
- Active member List

standard – memberships – member list report – member status – active members

- Ex Member List

Active member List standard – memberships – member list report – member status – cancelled members

We also have further documentation on income reporting & more common reports available from www.legendreleases.co.uk