Front Of House Support Guide

Last Updated:	10th November 2017
Prepared by:	Jonathan Barlow

CONTENTS

1. FRONT OF HOUSE BASICS

1.1. OPENING FRONT OF HOUSE

Once you have logged into Legend you will then need to double click on the 'Legend Front of House' icon on the Legend desktop to open the application.

1.2. OPENING A SHIFT

When you first open Legend Front of House (FOH) you will be prompted to open a shift, a shift is required to process transactions through the till.

- When asked if you wish to open a shift select "Yes", the following screen will then appear.

- Usually there will just be one shift titled "All Day", this shift can be opened / closed multiple times throughout the day.
- Click on the "Authenticate" button and type in your Legend username and password, once you click ok you will then notice that your name & user name appear in the owner box, do not click authenticate again otherwise you will have to type your username and password again.
- Once your name & username appear in the owner box simply click 'OK'.
- Another popup will appear that asks if you wish to add a float into the till, if you select yes then a box will appear asking you how much you wish to add, once this is added the integrated till drawer will open and a receipt will print out to confirm this.
- Your shift is now open and you're ready to take transactions.

1.3.   CREATING/EDITING SHIFT DEFINITIONS

Should you ever decide to create additional shifts for staff to sign onto you can do this by clicking onto the shift button, you will see this button located along the bottom of the POS screen. It will have a description of the shift you opened, the date and the time it was opened and will look something like the button below.
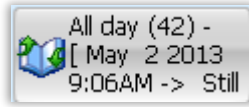
If you click on this button then more options will appear underneath, here you can create, edit, close and reconsile shifts.

1.4.   FRONT OF HOUSE BUTTONS

Along the top of Legend Front of House you will see several different buttons, each of these will be explained as this guide progresses. You can always see which button is selected as it will be highlighted in orange.

2.   POINT OF SALE (POS)

This is the main screen of the application where you can sell products to customers. You will see lots of folders & buttons which organise all of the products that you sell. Clicking on any of these buttons will add the item/product to the 'Basket'

2.1.   MEMBER PASSPORT

Underneath the POS buttons there is a blue bar, this is what we call the Member Passport.

If a member is in your passport then this is who the next transaction will be associated to, some POS buttons might require a member to be in your passport before you can complete the transaction and all bookings require a member (see section 3 for searching members).
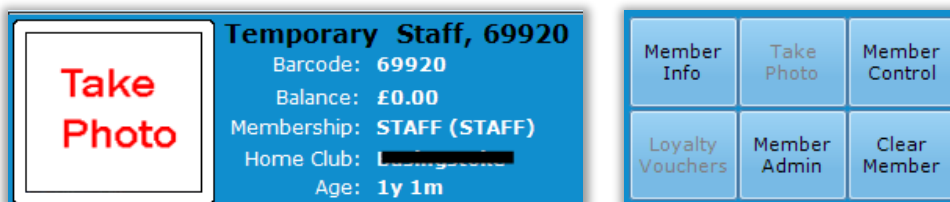
2.2.   BASKET TRANSACTIONS

In order to sell an item, the item must be added to the basket on the POS screen, simply click an item on the POS screen to add it to the basket. The basket is located on the bottom right hand side of the screen.
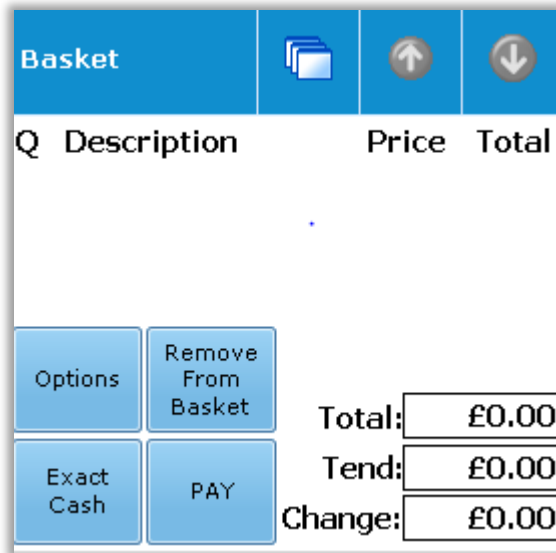
Within the basket there are four buttons that you can select (only once something has been added into the basket).

Exact Cash – This button allows for a quick transaction, the till drawer will open and a receipt will print (if these devices are integrated) and this will conclude the transaction.

PAY – Selecting PAY allows you to pay by an alternate payment method such as credit card and also allows you to perform split payments. When you click PAY the below screen will appear.
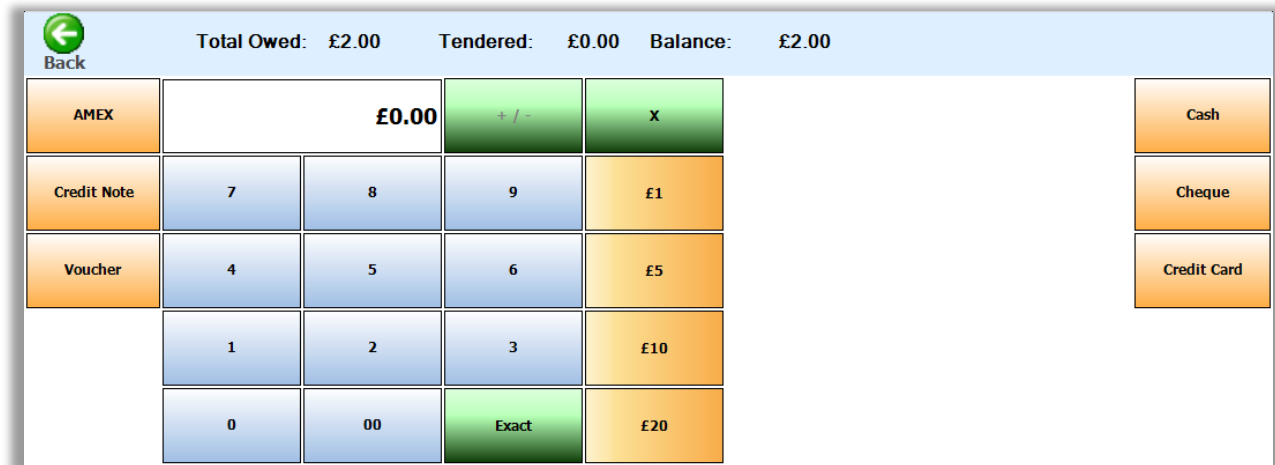
Along the top you have a Back option should you wish to go back a step, you can see the Total Owed, how much has already been tendered and the remaining Balance.

Enter the amount of money that the customer is handing you and then select the method of payment, as an example if you were to select that the customer has tendered £10 and the total owed is £2, when you select the Cash button to complete the transaction it will then show you how much change to give, this is displayed in the basket at the bottom right of the POS screen, this amount will stay here until you begin another transaction.

If you enter any amount LESS than the total owed, a box will appear asking if you wish to perform a split payment, you can then enter the remaining balance and select your alternate payment method. This is useful for when a customer would like to pay part cash, part credit card.
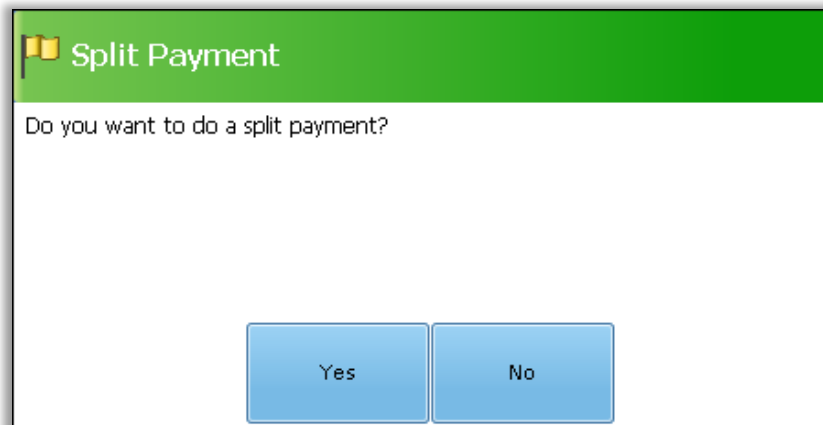
Remove From Basket – Select the item you wish to remove and click this button to remove it from the basket.

Options – When this is selected a new screen will appear, you will see your transactions listed and to the right of these there will be a column of buttons.

Up/Down: Changes the current item selection.
Remove From Basket: Will remove the selected item from the basket.
Discount: If an optional discount is configured for the selected item then you can apply it here.
Dis. All: This allows for an optional discount to be applied to all items in the basket.
Clear: Removes all items from the basket.
Layaside: Allows you to lay the basket to one side and perform another transaction.

2.3.   LAYASIDE BASKET

Legend allows you to put the contents of a basket to one side and then bring it back later on.

To lay the basket aside follow these steps:

Add items to your basket > Select "Options" > Select "Layaside"

You'll now notice that the items from your basket have been removed, you can now process another transaction.

To add the laid aside items back into the basket click on the icon with multiple windows in the Basket and select "Laidasides"
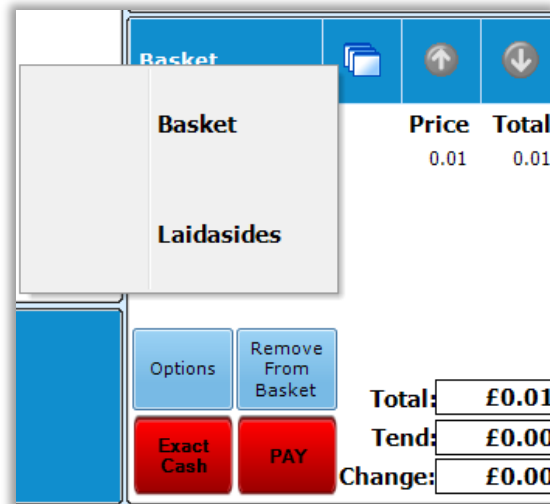
You will then see any baskets that you have laid aside.
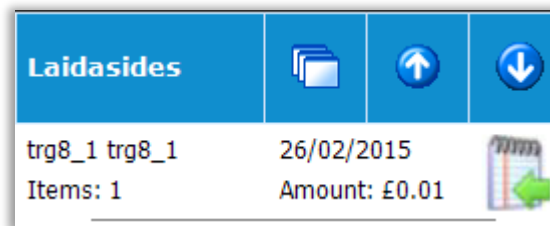
Click the notepad icon to add it back to your basket > use the multiple window icon to change back to your Basket.

If for any reason you don't come back to any laid aside baskets then this will not affect anything at all, they will simply automatically clear at the end of each day.

2.4. QUERYING PRICES

On the POS screen, near the top right hand corner (just above the POS buttons) you will see this icon:

When you click this icon it will increase in size and put a square around the icon. When this button is selected it will enable you to query a POS item's price.

Click on the Query button > Select any POS item > The price will pop up.

Make sure to click the icon again once you're finished querying so that you're able to add items to your basket again.

If this is enabled (via club settings) a barcode search icon will appear next to the [?] icon. Once this is clicked, the search bar will change to barcode mode.
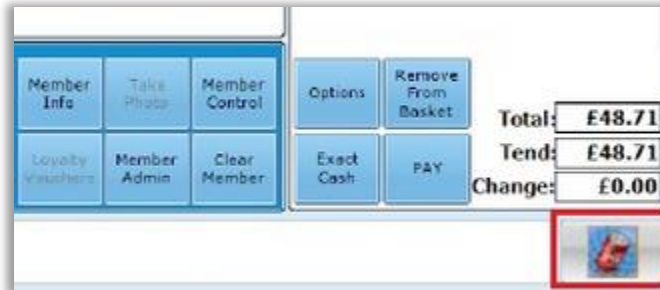
The change of icon indicates that this is in barcode mode: Enter the barcode in the search bar to search for the associated item. If multiple matches are found, they will be displayed in a list, allowing the user to choose the correct item.

2.6. AUTOMATIC DISCOUNTS

When you have a member in the passport (covered in the next section) you will notice that some items are automatically discounted when added into the basket. It is important that the member is on the correct membership/agreement so that they receive the correct automatic discounts.
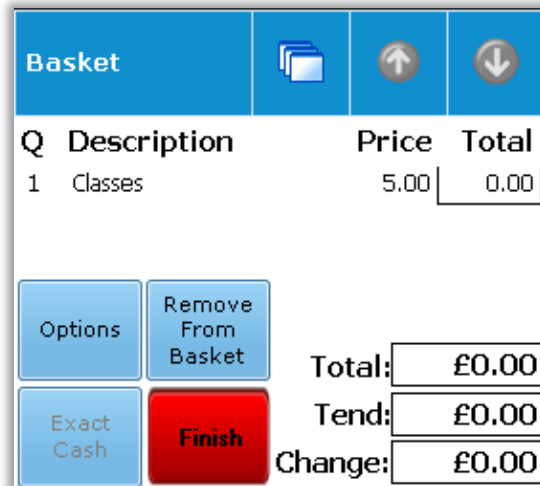
2.7. COUNTDOWN VOUCHERS

Countdown vouchers can be sold through the POS screen, all vouchers require a member to be in the passport before you can sell the item to them (it will prompt you if you don't have a member in the passport). Countdown vouchers are used to sell any number of items / bookings / sessions to a customer.

Selling the countdown voucher to a customer is exactly the same process as selling any other POS item to a customer. Just select the item to add it to your basket and pay it off.

Redeeming the voucher: Add the member to the member passport by swiping or searching > Add the item / booking / session to the basket as you usually would > A popup will appear to show how many usages of their countdown voucher the customer has remaining > Select to use the voucher > This will automatically deduct one usage from the remaining balance.

Countdown vouchers can be refunded when cancelling a booking. When refunding an extra use will be added back to the original voucher.

3. MEMBER CONTROL

3.1. SWIPING MEMBERS

To add a member to the Member Passport it is as simple as swiping or scanning their card with your integrated card reader, once a card is scanned or swiped the customers details will appear both in the Member Passport (left) and in the Member Swipes section (right) that is located at the top right of Front of House on the POS screen.

A successful swipe will always appear green, if a member has an issue on their account such as an outstanding debt or perhaps if the membership has lapsed then the swipe will appear in red and subsequently will not allow access through any integrated gates or turnstiles until the problem is resolved.
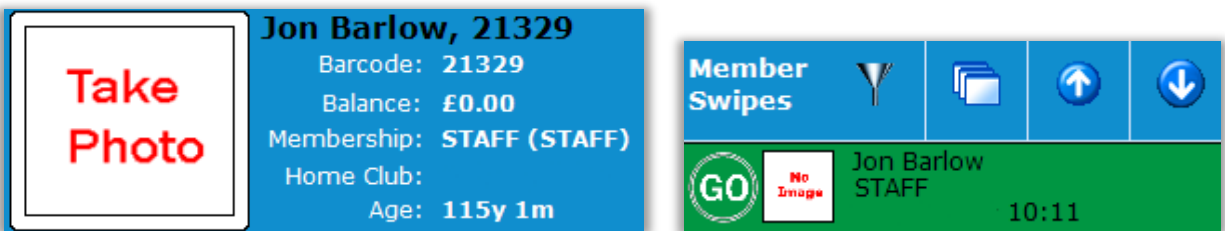
3.2. MANUALLY SEARCHING FOR MEMBERS

The quickest way to search for a member is to use the member search bar that can be located towards the bottom right hand section of Front of House.
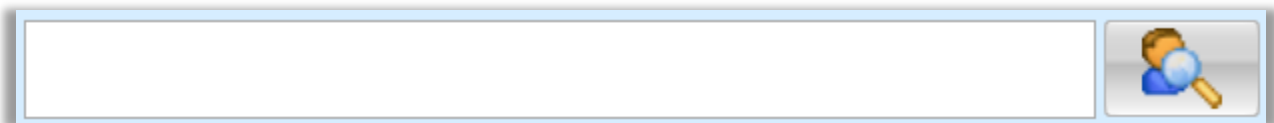
Search for a member by typing all or part of their surname first > add a space > type all or part of their first name.

If there are no other members that meet the search criteria you entered then they will load straight into the Member Passport, if there are other members with that search criteria then a list of these members with basic details will pop up for you to choose from.
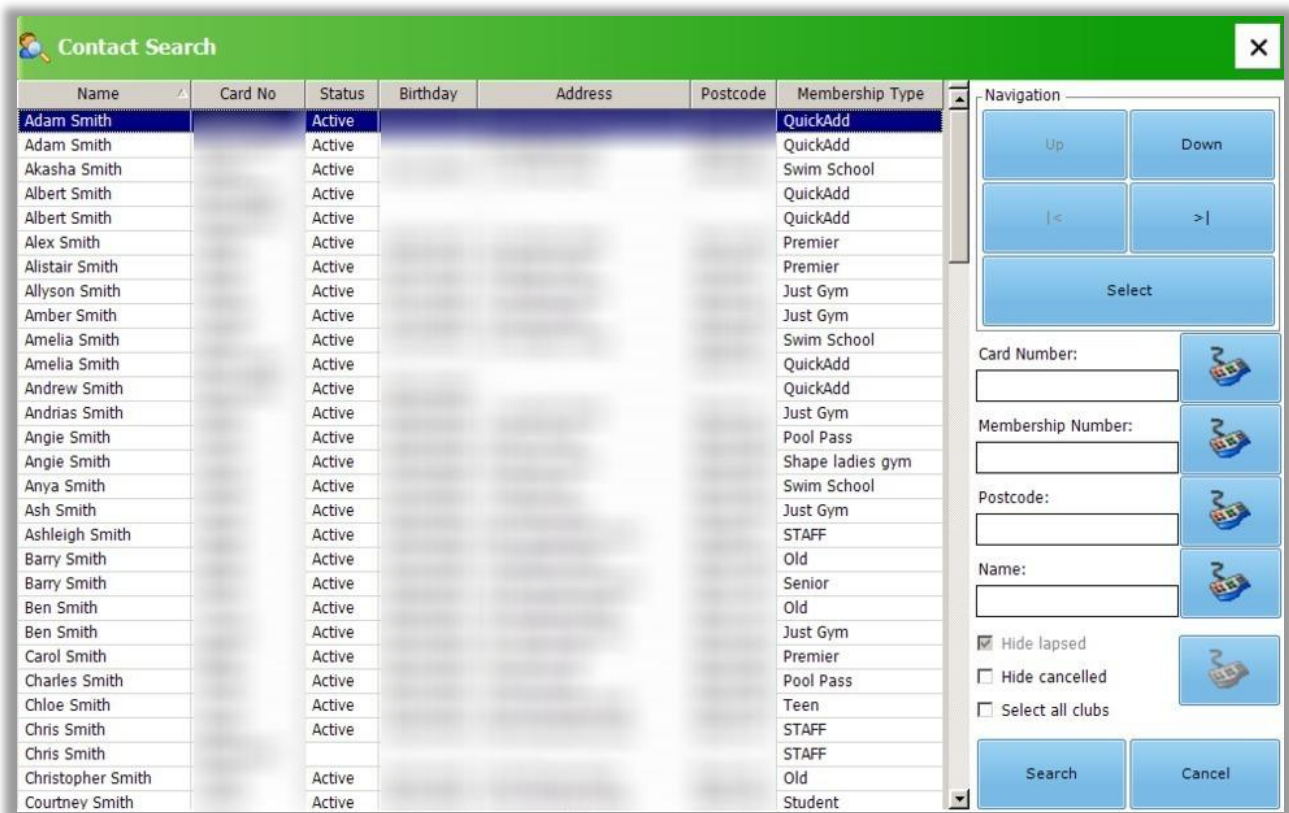
You can also type in a members card number or member number to load them directly into the passport via the member search field.

It is also possible to open contact search by clicking on the icon to the right of the member search box, by doing this you are able to broaden your search parameters.

Once you have searched for a member it is important to click into the Member Control tab (from the buttons along the top of the screen) and press the "Allow Entry" button, this will then swipe the member into the club which will automatically attend any upcoming classes / bookings they have.

3.3.   PROBLEM SWIPES

If a member swipes in and they have a problem with their account this will appear as a red coloured swipe in the member swipes box, it will also take you directly to the Member Control tab in Front of House, here you will be able to see the reason for the problem swipe.

There are many possible causes for a problem swipe including outstanding debt and lapsed agreements, both of which are covered as this guide progresses.

3.4.   PAYING FOR CHARGES

If a member has outstanding debt this will be instantly noticeable as when the member swipes or you search for the member it will load straight onto the Member Control tab where the issue is usually highlighted like the screenshot below illustrates.

To pay any outstanding amount it is just a case of clicking the basket icon to the right of the amount, this will add any charges to the basket where you can process the transaction.

3.5. RECALLING A MEMBER INTO THE MEMBER PASSPORT

Whenever you complete a transaction it will clear the member from the passport and take you to the Member Control screen, still because there is no member in the passport there will be no transaction associated to the member in Member Control.

From this screen you see a big green go button or if they're a problem member and they're in red you'll see a red circle with a white line through the middle like the screenshot in the last section. If you select this button it will add the member into the passport.

You can also double click a member in the Member Swipe section to add them into the passport.

4. MEMBER INFORMATION

When you have a member in the Member Passport you will see a set of buttons to the right hand side of this passport.
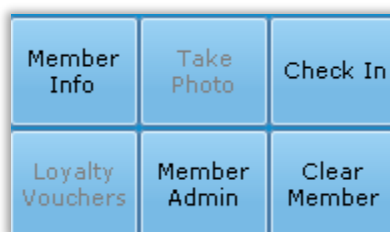
If you press Member Info another screen will appear with a set of coloured tabs along the left side of the screen:

Date	Paid By	Description	Invoice	Debit	Credit	Balance
04/04/2013		Amounts not due - Membership Fee Payment			£45.00	£0.00
25/03/2013		Memberships		£22.50		£45.00
25/02/2013		Memberships		£22.50		£22.50

4.1.   STATEMENT

This tab displays the full member statement including date, description of the transaction and how much was paid. For more detailed information please see Membership Management – Statement.

4.2.   BILLING

If a member has any outstanding charges or perhaps a block booking then the future weeks will appear in here. You can choose (tick the box) to pay multiple bookings in full, part pay bookings or even invoice them if you use the integrated Legend Invoicing module.

4.3.   BOOKINGS

There are 2 tabs in this section that will allow you to see just today's bookings or all of the members future bookings.

You can select a booking by clicking once on it, there are options to the right of this section to print the receipt for the individual booking and an option to cancel the booking.

This is the quickest way to cancel a specific member's bookings.

4.4.   GROUPS

Used for Interest Groups. Additional documentation is available.

4.5.   SPORTS COURSES

This section displays any courses that the member is currently enrolled into, you have the option to cancel a course enrolment from this screen.

4.6.   EVENTS

Events displays any changes made to a members account such as membership upgrades, change of personal details and will even show a record of when the member has swiped into Front of House. For more detailed information please see Membership Management – Events.

4.7.   VOUCHERS

This displays any vouchers a member may have on their account. How many uses they have left and when the voucher is due to expire. If you have sufficient security permissions you can also add / remove voucher usages.

4.8.   PAR-Q

This displays the online member's signup pre-activity questions and answers.

4.9.   ELIGIBILITY

Eligibilities might be setup and linked to specific POS items or bookings so that it will restrict the member from buying or booking something unless they have the correct eligibility on their account.

5.   MEMBER QUICK ADD

The Quick Add tab is used for registering 'casual' member details on the system, this only needs to be performed once for each new member.

The Legend system requires a member to be able to book onto a class or activity, buy vouchers and buy specific inventory items (if configured this way).

Typically this type of casual membership will never expire and there are no fees attached.

5.1. ADD A NEW QUICK ADD MEMBER

- Click on the cog icon to the right of the Membership No Field. This will populate next available membership number and will set the barcode as the same number (barcode can be changed later).

- Enter all mandatory fields – Usually first name, surname, date of birth and a phone number.

- If you wish to provide the 'casual' member with a card you can do so by clicking the icon to the right of the Barcode field and then swipe / scan your card.
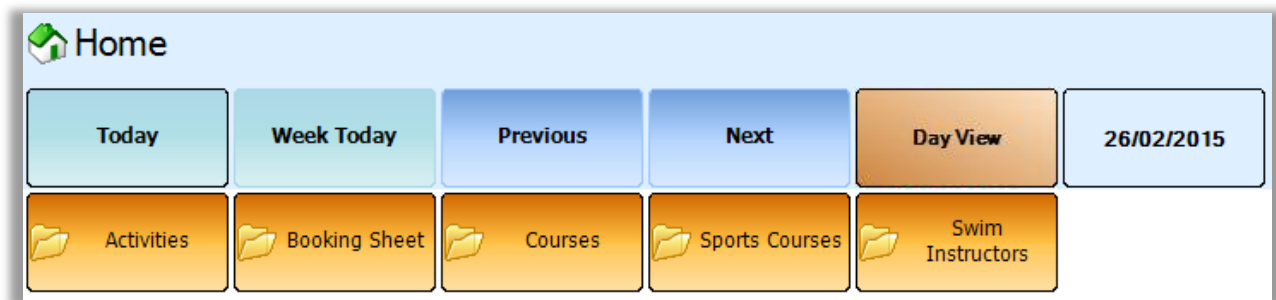
6. BOOKINGS

6.1. NAVIGATING THE BOOKINGS SHEETS

Click the Bookings tab in Front of House to access this screen, like the POS screen you will have a series of different folders which in the end will take you to a booking sheet.

The next 2 sections (6.2 & 6.3) explain how to book members onto classes and activities, before we move onto that it's important that you know how to get around the booking sheet.

Persistent buttons

If you ever want to go to the 'Home' screen of the bookings tab you can select 'Home' at any time, this is located just under the POS tab button at the top left of the application.

Today – Will always take you back to today's bookings.
Week Today – Will take you to a week today.
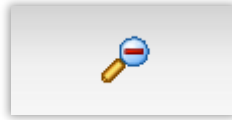Previous / Next – Will go forward or back by one day.
Day View – When this is clicked you will be given options to see 1, 5, 7 or 8 days. It is advised not to select 1 Month as it can take a minute or two to load.
Date – You can select a specific date by clicking this.

Booking sheet buttons

When looking at the booking sheet you will have this button above the time slots…

This is especially useful when looking at your physical locations such as courts, it removes all of the blank bookable spaces and just shows existing bookings.

On the right side of the booking sheet are another set of buttons…

- When the window button is clicked this will move the basket & member options from the screen until you click it again.
- The time button will allow you to navigate the booking sheet much quicker by selecting the time you wish to make a booking, especially helpful if you have short timeslots.
- The arrows are used for navigating between multiple courts or different times.

6.2.   REGISTER FOR A DROP IN CLASS

- Make sure you have a member in your passport before following these instructions.

- Classes are always located in Activities > Classes

- In the Classes folder you will see all of the classes that your site offer.

- Select a class, if nothing appears it means that there is no class scheduled for the day you have selected, its best practice to change the 'Day View button to 7 or 8 days to get a week view of the class schedule, it will look similar to the screenshot below.

- Click once on the session you wish to book your member into, a popup will appear to ask if you wish to Book & Pay Later, or simply Add to Basket to pay for the booking right away.
- If you add the booking to your basket make sure the customer pays for it to confirm the booking, if book now and pay later is selected then this will be added as a debt to the members account and will appear on the Member Control screen when they swipe in until this is paid for.

6.3.   REGISTER FOR A AD-HOC BOOKING (BADMINTON, SQUASH, 5 A SIDE)

- Make sure you have a member in your passport before following these instructions.

- Ad-Hoc bookings are always created by selecting the location you wish to book > a list of activities available in the area will then appear. In this example I am selecting Booking Sheet > Sports Hall.

- It is recommended to use a 1 Day view when looking at the bookings sheet.

- You will see a list of the physical locations you have available in the selected area.

- Select the time you wish to book and click into any of the available areas

- A screen will then appear with a list of the available bookings in the physical area at the time you selected. Depending on which activity you have selected it might be setup to use multiple areas, others might allow you to specify the area to book.

- When you have made your selection, click on Book Now & Pay Later or Add to Basket to pay for it right away and confirm the booking.

6.4. BOOKING QUERY BUTTON

Like with POS buttons there is also a Query button in the bookings tab, this works in the same way. When you click it, it enlarges and has a square around it.

Once the query button has been selected you can select any class or activity to see more details. This is how you will see the class attendance list.

6.5. PAYING FOR BOOKINGS

If you selected to book & pay later for a booking, the booking on the sheet will have a green cash symbol to show that a member or some members have an outstanding balance.

You can use the Query button and then select the booking from the booking sheet, this will open the details screen where you can select the member with the outstanding balance and select pay (covered in more detail in the next section)

6.6. BOOKING ATTENDEES LIST

To view the attendee / attendees of a class or activity follow these instructions:

Select the Query button > Browse for the booking you wish to query > Select the booking > this will open the booking detail screen.

On this screen (screenshot below) you will have a list of attendees. If you have queried a class there will most likely be a big list and if it's an Ad-Hoc activity it will only have one person in the booking.

To the right of the member list you will see a series of buttons:

Close – Will close the booking detail screen and return you to the booking sheet.

Up/Down – Will change the member selection.

Change Status – If you have the correct security permissions you can override the status of the booking, for example if a member forgets to swipe their card but did attend the class, here is where you can change the status. More detail in section 6.7.
Waiting List – Covered in section 6.8.

Print List – Will print off the attendee list to the workstations default printer.

Print Receipt – Will re-print the receipt for whichever member you have selected.

Pay Booking – If a member has an outstanding balance you can add it to the basket directly.

Cancel Booking – Will cancel the selected member from the booking.

6.7.   BOOKING STATUS

When a member books onto a class, by default that status will usually be set to 'Booked'.

Depending on how your Legend system the following status's might have an impact on the member making bookings.

Attended – By default if a member swipes their card or is manually allowed entry 2 hours before a class (this number may vary depending on how the system is configured) then the status will automatically update to this.

Non-Attended – If a member isn't automatically or manually marked as attended then the status will change to Non-Attended overnight, this will reflect on booking reports and could potentially have consequences for that

member such as a booking strike or perhaps even a charge has been added to the member for missing the class, this will vary depending on any booking penalties configuration.

Cancelled – If a member cancels the class either in-house or online they will still appear on the booking detail screen, however their space will not be counted toward the class capacity meaning that someone else can take their space.

If a class is fully booked and you try to book a member into it, a message will popup asking if you would like to add the member to the waiting list (if you have waiting lists enabled).

You can access the waiting list for classes by using the Query button > Select the class > Select Waiting Lists from the booking attendees list screen as covered in section 6.6.

In the waiting list you will see a list of member names, numbers, contact details, the time and date that they were added to the list and the communicated column. On the right you will see several options to move the member to the class, go back to the attendee list, remove the member from the list and set communication flag.

- When a space becomes free on the class you will view this waiting list screen.

- Select the member that was added to the waiting list first (usually at the top).

- Contact the member to see if they can attend the class.

- If the member can attend the class then simply select 'Move to Class'.

- If the member can't attend the class or cannot be contacted you should select 'Set Communication Flag', this will open a popup with several preconfigured communication flags.

- The purpose of the communication flags is to mark the outcome of the contact with the member, these are usually 'No Answer', 'Left Voicemail', 'Member Could Not Attend' etc.

At the bottom left corner of Front of House you will see an icon with the name of your site and a house with a green roof. When you click this button you will then have an option to change the booking club. The purpose of this is so that you can make bookings for other sites should your company permit this.

6.10.   SPORTS COURSES

On the Bookings tab you will see a folder called "Sports Courses", should your site schedule any Sports Courses then they will appear in these folders, when you select the Sports Courses folder you will first see a list of the sport categories such as swimming.

Please note that when you select this folder / category it might not load anything right away. This is because you have another set of tabs that will display the courses for Today / Current / Future, in conjunction with these you can also specify which day you wish to view or select All Days. Make sure to select one of these options in order to display courses.

To enrol a member onto a course you should first add the member to the member passport > then select the course you wish to enrol the member into and it will be highlighted in red > select "Enrol Member". When you select it the following options will appear.

You have the option (if configured this way) to enroll the member onto the whole course, all future sessions (used if the course is already several sessions in) and drop in for a one off session.

Once you have made your option the next popup will appear where you can Book & Pay Later, Add to basket, or Book & Pay Later by other member. Once you have selected one of these options the member will be enrolled onto the course.
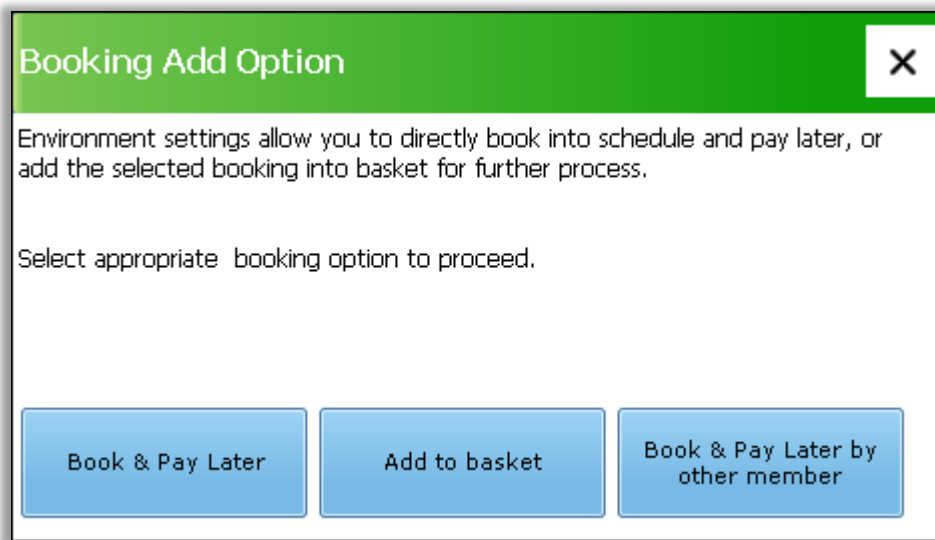
To see the course attendees is the same process as viewing any other class or activity attendees, simply select the query button and click on the course.

Once you have queried a course you will have options to Pay for the session / course for a member, unenrol and move a member between different courses.

6.11. CANCELLING BOOKINGS

If a customer wishes to cancel a booking there are two ways of cancellation:

1. Load the member into the member passport > Select member info (also in the passport) > Select Bookings tab > Choose between Today / All Future bookings > Select which booking you which to cancel > Select Cancel Booking.

2. Open the Bookings section of Front of House from the buttons along the top of the application > Find the class / activity / course you wish to cancel from > Query the booking using the query button > Select the member you wish to cancel > Select Cancel Booking.

Whichever way you choose the cancel the booking you will be presented with the following popup.

If the member hasn't paid for the booking or gets the booking free as part of their membership then only the No Refund option will be available.

If the member has paid for a booking and depending on your cancellation policy you will be able to select from Refund or Credit Note.

Credit Notes can be used in Front of House and Online towards any POS item or booking, it will appear as a tender type in Front of House when you select Pay.

7. OPTIONS

The Options are located along the top tabs in the Front of House application (not to be confused with the basket options).

7.1. GENERAL

The General section lets you:

- Open Cash Drawer – Manually open your integrated cash drawer
- Print Receipt – Reprint last transactions receipt
- Advanced Bookings – Will open the Legend Bookings application (covered in the BOH guide)
- Login / Logout Payment Device – Will log in or logout of your integrated PDQ device
- Change Barcode – Will allow you to change a members existing barcode or assign a new barcode to a member

7.2.   TRANSACTION OPTIONS

It is important to note that all of these options require you to enter your Legend username and password, it will only allow you to perform these actions if you have the relevant security permissions assigned to your user.

- Adjustment – Not used.
- PrePayment – Not used.
- Float-In/Out – Allows you to add in or take out a float.
- Petty Cash-In/Out – Allows you to add in or take out petty cash.
- Refund – To refund a POS item you must first click this button > It will ask for your username and password > Once you have entered this it looks like nothing has happened > Go back to the POS tab and add the POS item you wish to refund to the basket, you will notice the basket turns red, this means you're in refund mode > Complete the transaction as you would for selling the item to the customer. The system will only stay in refund mode for one transaction.
- Retrieving Transaction – you can configure legend to retrieve transactions for up to 28 days, in Global Settings>FOH(1). In this option you can either re-print receipt or email it to the customer.

7.3. REGISTER A PAYMENT CARD

To register a payment card for monthly scheduled credit card payments you should use the **Register Payment Card** option.

This option will only appear if you have a compatible pinpad connected to your workstation.

Upon selecting this option you will be prompted to tap, swipe or enter a card into the pinpad, this will link the credit card to the members account.

A pop up box will appear to confirm that the card has been registered.

To update a members card details, you should simply register a new payment card, it will inactivate any previous cards.

Please note: Legend does not store any credit card details in the system, it stores tokens that are generated by the payment provider.

7.4. STOCK CONTROL

Please see additional training documentation for stock control.

Allows you to access three specific reports relating to Front of House transactions without having to go to open Legend Reports.

- Category Summary - Shows all transactions processed through the till, broken down into categories, i.e.: membership fees, bookings, POS sales.
- Transaction – Will provide details of for all transactions processed through Legend.
- Transaction Detail – Will give you the most amount of detail for all transactions processed through Legend.

8. ADDITIONAL FOH>POS BUTTONS (BOTTOM OF THE SCREEN)

- Centre – This shows your current booking location and also the site that your workstation is set to.
- Messages – This module can be used to send messages to colleagues or even send messages to members, these will only be viewable by Legend users.
- Cash Management – End of day banking module, covered later in this guide.
- User – This button can be used to change the owner of the current shift or even log out of Front of House so that no transactions can be taken until another Legend user logs in.
- Shift – When you click on this icon you will receive options in the passport to create, edit, close & reconcile shifts.
- Member Name – If a member is in this box then the next transaction you process will be associated to whoever is in here.

9. 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.

9.1. OVERVIEW

To the left of this application is the function bar, any action relating to a member can be found in this column.
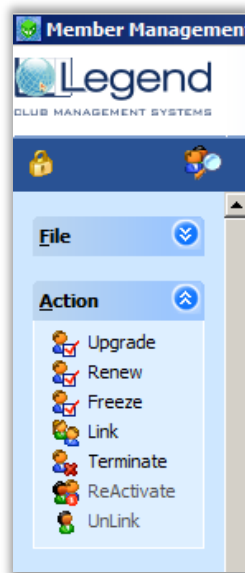
Along the top you have various tabs, by default you will always start on the 'Member Data' tab, you will click through these tabs to see various information about the member.
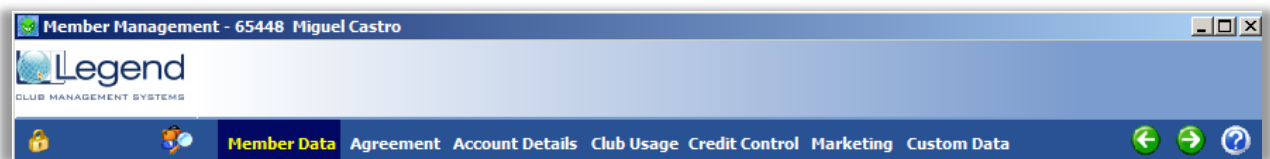
At the top left of this application you will see a gold padlock icon, when you click this you are in edit mode, this allows you to change certain member details such as home address, phone numbers etc. While in this mode you can click the padlock again to undo any changes or the green save icon that 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.

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.

9.2.   ADDING NEW MEMBER

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:
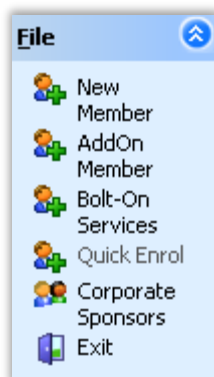
- Click next on the first step and on the second step you can select the member's home club.

- 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.

- 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.

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

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.

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.

Events

Any action that is performed to a members account such as a change of details and membership change or even when they make a booking or swipe into Front of House. All these events are logged and are viewable in this section. You can click through the different tabs to see different types of events, if you double click on an event it will give you more details such as the user who performed the action, the date & time and what action was performed.

Statement

You can view the members full statement in here and different parts of the statement on the various tabs, towards the top right of the statement you have the option to print the statement.

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.

Check In Note

If you would like to add a note that will be displayed when a member swipes into Front of House make sure you find the member first and that you're on the Member Data tab.

Select the **edit button** (top left of the screen, padlock)

Add your note to the Check In Note field and then click the **save button** (green icon next to the padlock).

NB this note is used to inform members of an action that must be completed (e.g. collect new membership card, book a refocus session in the fitness centre etc.).

Online Admin

If you use our online services then you can change the customers linked email addresses & reset their password for the online services portal.

9.5.1. 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.

9.5.2. AGREEMENT

Agreement Detail:

This is where you can see all linked / joined members and the current agreement they're on, selecting a different member in this window will load them instantly into Membership Management across all tabs.

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.
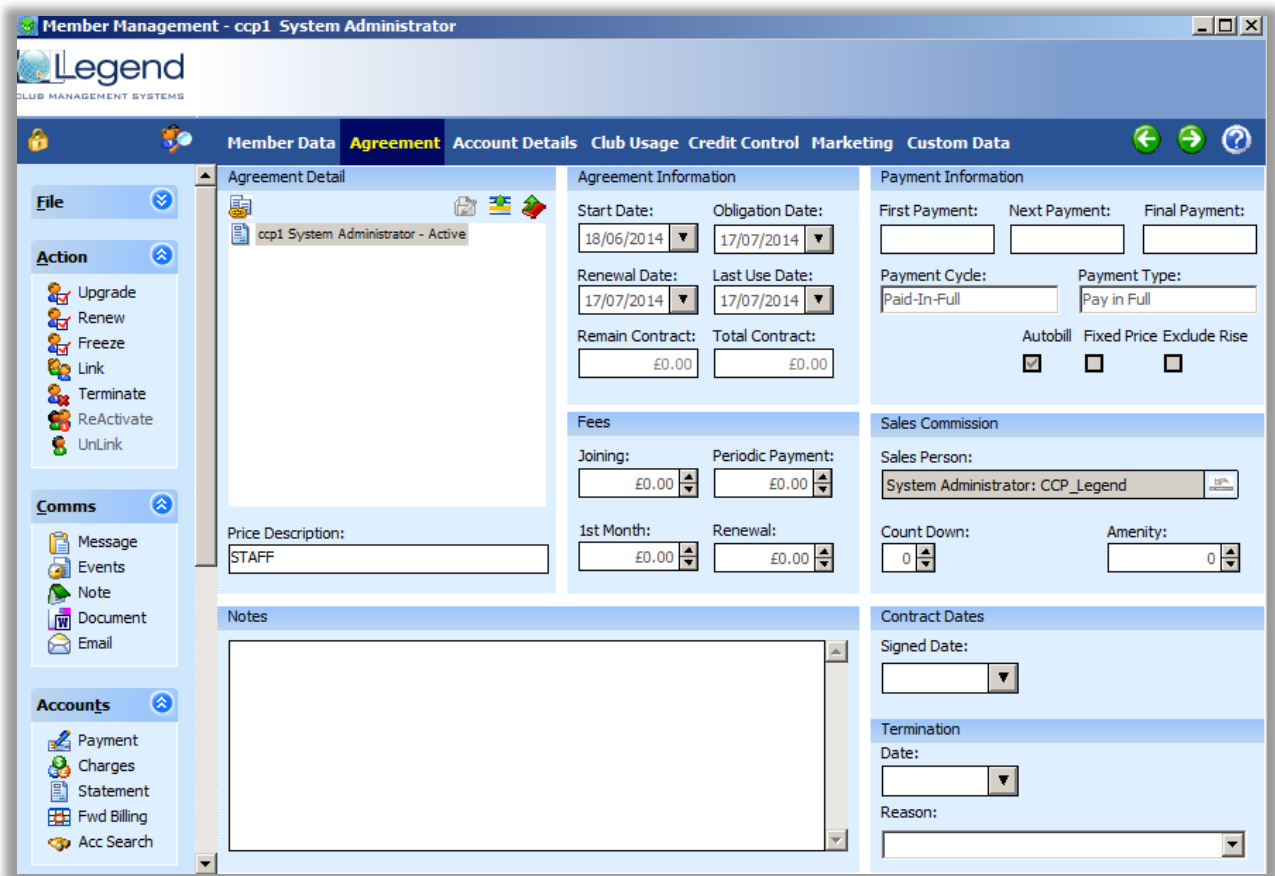
9.5.3. ACCOUNT DETAILS

This screen is where all the account details for the member are held. If a member is on freeze this will be where this information is also held and can be cancelled if they decide to return back from their membership early by clicking on the cancel freeze option.

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).

Bank Detail

Name: _____

Account No: _____

Sort Code: __ – __ – __

Verify Branch Account?

Ref: _____

Code: [00 - New not Valid ▼]

Create New Account

Payment Information

Cycle: [Monthly ▼]

Payment Type: [Pay in Full ▼]

P O S Limit: [£0.00 ⬍]

Final Payment Date: _____

Next Payment Due: [N/A]

Total Next Payment: [£0.00]

Collect All: ☐

Freeze History

_____

Reason: _____

Start: _____

End: _____

Prevent Use: ☐   Cancel Freeze ?

Account Activity

Date	Analysis	Description	Method	Debit	Credit	Balance	O/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]

9.5.4. 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.

Club Usage

Year   2012   <   2011   >

Jan		
Feb		
Mar		
Apr		
May		
Jun	1	
Jul		
Aug		
Sep		
Oct		
Nov		
Dec		
Total	1	0

Recent Visits

Chelmsford - 18/06/2012 12:06:48

Override

Access: [N/A ▼]

Date: [▼]

Fees: [N/A ▼]

9.5.5. CREDIT CONTROL

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

9.5.6. 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 Services can be used entirely on their own, or in conjunction with existing agreements / memberships.

- **Key Differences:**
    - o Agreements: A member can only have one agreement at a time.
    - o Member Services: There is no limit to how many services that a member can have active.

10.1. SCHEDULED PAYMENT SALE / SETUP PROCESS

Before you can sell a customer a Direct Debit, EFT or Credit Card based service you must first make sure that bank details or credit card details are linked to the members account.

10.1.1. CREATE DIRECT DEBIT / EFT MANDATE

- Open FOH > Load a customer's details into the member passport
- Locate the Direct Debit / EFT Member Service POS button select it

- If the customer doesn't have bank details linked to their account you'll notice that the 'Mandate' field is empty.
- To add / update bank details > Select "Create New Mandate"

- Enter the bank details and then click 'Save'
- Select a payment date
- Add to basket and complete the transaction
- Note: You can still update a customer's bank details in the MM > Account Details section

10.1.2. CREATE CREDIT CARD MANDATE (REGISTER PAYMENT CARD)

- You will only be able to register a credit card on a computer that has a compatible pinpad connected
- Open FOH > Load a customer's details into the member passport
- Go to FOH > Options
- Select 'Register Payment Card'
- Ask the customer to insert their card into the pinpad when prompted
- You'll see a popup appear in Legend that confirms the card registration
- Locate the Credit Card Member Service POS button select it
- You'll notice that the 'Mandate' is populated with a registered card
- Select the preferred payment date
- Add to basket and compete the transaction

## 11. BANKING – CLOSE SHIFT & CASH UP PROCESS

Please note that before you close your shift you should make sure that the member passport is clear, if there is a member then click on the button with their name on and select 'Clear' from the options in the passport.

To **Close** your shift, follow the instructions:

- In Front of House make sure you're on the POS tab.

- Click on the shift button along the bottom.
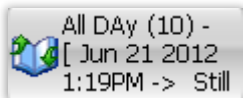
- In the passport select 'Close Shift'.
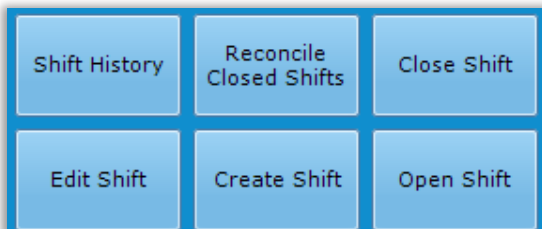
- A popup will appear confirming the shift you're closing, just click OK.

- Enter your own Legend username and password.

- Select if you wish to take your float our or not.

- Reconcile Shift **–** Select 'Yes' to enter cash up right away or 'No' to cash up on another workstation. If you select 'No' you can find your un-reconciled shifts by clicking on the shift button > select 'Reconcile Closed Shifts' (screenshot above). If you ever back-out of a cash up you can start the process again by clicking into Reconcile Closed Shifts and selecting the shift you wish to reconcile.

- You will be presented with the Cash Lift screen, here you should click onto each denomination and enter the amount of money you have in your till. Should you make a mistake just click onto the amount again and select 'Add' to clear it.

- Once you have done this, select the 'Add Small Bag' icon above the cash type buttons.

- Enter the reference number for the small bag, this is usually the reference number from the small bag that you're putting the money into, the date, initials and what tender type is in the bag such as cash or cards. Best practice is to usually add one small bag for cash and a separate bag for your card takings.

- Once you have created your bags, select the 'Save' button at the top left, the Cash Lift screen below will appear.

- The Note field is mandatory however this is rarely used, you can enter a . in this box.

- Click 'Authenticate' this is usually where the supervisor or duty manager will enter their Legend username and password > Click OK once this has been done.

Cash Lift

Note:

[ ]   Enter Note

Verified By: [ ]   Authenticate

                                    OK   Cancel

- The next screen will show you the Total Lifted (how much you entered for the cash up), the Total Transacted (how much was processed through this Legend shift) and your Cash Variance. You will also have the following options:

Adjust Lift – Allows you to go back to the Cash Lift screen and add new small bags (not recommended unless you forget to add your card / voucher bags).

Continue – Will complete the cash up process and only appears if there is no variance.

Accept Variance – Selecting this will accept any variance after you have entered a note / reason for accepting the variance.

Back Out – Clears all information you have input and takes you back to the start, you can start the process again by selecting the shift button > reconcile closed shifts.

Print – Will print out all transactions taken throughout this shift, useful for finding variances.

- Once you have completed this process a popup will appear asking if you wish to begin the end of day processing, you should select 'No'.

12. LOGOUT OF LEGEND

It is important that you know how to log out of Legend correctly as to not exceed your Legend workstation limit. Do NOT click the red X at the top right of the screen, this will NOT log you out, it will just close the window but keep you logged in.

You should click on the Start menu at the bottom left of your Legend session > Select Log Off
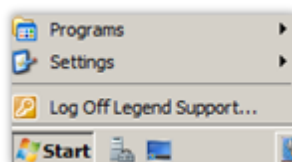
13. CASH MANAGEMENT

You can open the Cash Management module in Front of House > POS tab > Cash Management button (along the bottom). Each option has a detailed explanation of what it is used for.

13.1. BIG BAG HISTORY

The big bag history screen will display a list of all money taken on all tills over a chosen period of time. It will also show you the current status of any big bags to show if they're on or offsite.

13.2. SHIFT BAG MANAGEMENT

Shift Bag Management allows the user to amend the amounts of each tender held within a small bag and alter the reference number if required.

Follow the wizard and on screen instructions to make any changes. Authentication via Legend username and password will be required.

Please note that if the changes alter the variance, then this must be accepted and authenticated.


13.3. BIG BAG MANAGEMENT

Big Bag Management will give the user the ability to:

- Create new big bags.
- Delete unwanted EMPTY big bags.
- Add small bags to big bags.
- Seal/unseal big bags.
- The options at the bottom of the Big Bag Management screen will differ depending on the bag status of the highlighted big bag.
- If a big bag status is set to sealed then this bag can't be changed unless it is first unsealed. The buttons will change to include "Break Big Bag Seal" and the "Next" button will be removed.
- Clicking on the "Create New Big Bag" option will load the keyboard to give the new big bag a reference/number.
- Please note - a big bag can't be deleted if it contains any small bags.
- Follow the wizard and on screen instructions to add any small bags into the big bag, continue through to the confirmation screen to check values and finish. Authenticate the process with the username and password and answer yes when asked "Do you wish to seal this big bag?"
- This bag is now sealed and will be ready to be sent offsite via the Banking Wizard.

13.4. BANKING WIZARD

The Banking Wizard makes the depositing of cash bags offsite quick and simple.

- The only bags that will be shown at this stage are sealed big bags.

- Follow the wizard and on screen instructions and add your specified big bags into the deposit.
- Once all of the required bags are in the 'Big Bags in Deposit' section, proceed through the wizard.

- The final screen will ask for a receipt number and a final check on the bags that are being deposited OffSite. Click Finish and Authenticate.
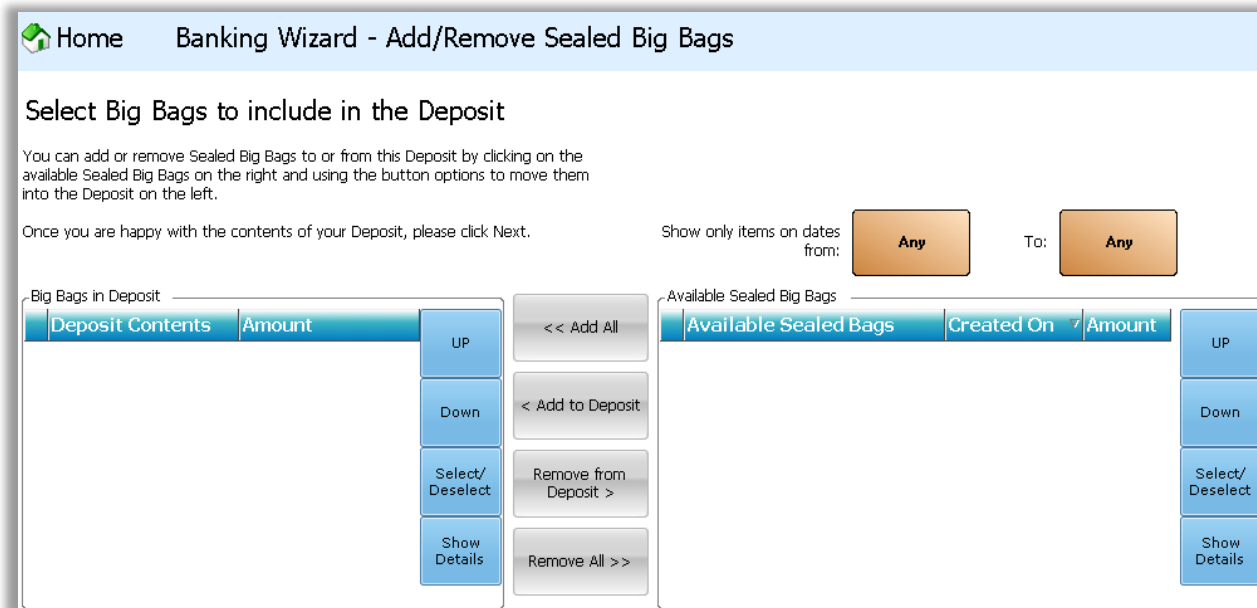
Please note that at some point this process will need to be completed the card tender bags to clear them from the system and stop the small bags from appearing.

14. LEGEND SALES

Legend Sales is the Legend prospecting module, it is like an e-diary for contacts, tasks & appointments. You can open this via the Legend desktop icon.

Please note that the contacts in this application are separate to the other Legend applications.

Along the left side is the functions bar and along the top are various tabs that change depending on which section of the application you are in.

14.1. ADD A NEW CONTACT

To add a contact click on the 'New Contact' button from the function bar.

Filling out the contact screen is a very simple process, it is just like filling out a form on a website or if you already have some experience using Legend it will be similar in many ways to Legend Membership Management

14.1.1. CONTACT SCREEN SECTION 1

- Contact - Enter the contact name. Title, first name and surname. E.g. Mr Steve Gates (When you start entering the name an additional field will be displayed which shows all the name fields.

- Salutation - Entered automatically, from the contact field.

- Telephone Numbers - These must be entered with STD (e.g. 01475 6201422)

- Gender - Click on the down arrow and select the gender type of the contact.

- Birthday - Enter the prospects date of birth.

- Company - Enter the company name or select one of the pre-approved corporates.

- Job Title - Enter the contacts job title.

14.1.2.CONTACT SCREEN SECTION 2

- Address City/Town & County - Click on the address box to add an address to a prospect. Multiple addresses can be added to a prospect by choosing the appropriate address type from the dropdown below Address.

- Postcode – Enter the postcode and click on the Globe and Magnifying Glass to search for the house numbers on that road and select the appropriate house number from the list. The rest of the address will be completed automatically. Click OK to save the address.

- Postal Address – Select which address should be used for mail merging, select the appropriate address using the address type drop down under the 'Address' button and then tick the 'Post Address' box. If more than 1 is selected they will receive multiple addresses when carrying out mail merges.

- Receive marketing material – Has the member expressed an interest not to receive marketing material, if so then un-tick the 'Receive marketing material' box.

- Email – Enter the contacts email address.

14.1.3.CONTACT SCREEN SECTION 3

- ID Status – Select the relevant status from the dropdown box (these may vary depending on site configuration):

  Suspect – Basic Enquiry / Outreach Contact.

  Prospect– Had contact with, made an appointment.

  Hot Prospect – Had a tour, interested in joining, went home to think about it.

  Join – The prospect decides they want to join then you can convert the prospect to a member (Shown further down).

  Blowout – The prospect decides they want to leave it for now; you can at this point try to talk again in a month and restart the process.

- Enquiry Type – How did the prospect contact us? Click on the down arrow and select the correct enquiry type.

- Referral From – Click the '…' and select the member or other prospect who has referred the member to you.

- Marketing Source – Where did the contact hear about us? Click on the down arrow and select the correct source.

- Promotion – Which offers are they interest in? Click on the down arrow and select the correct promotion.

- Member of a Club at Present – Are they a member of another club at present? If so select 'Yes' and enter the name of the club.

14.1.4.CONTACT SCREEN SECTION 4

- Interests – To add more than one interest, ensure the cursor is in the field, F2 to the open and the Edit List. Hold down the control key and click the appropriate options.

- Goals – To add more than one interest, ensure the cursor is in the field, F2 to the open and the Edit List. Hold down the control key and click the appropriate options.

- Objections – To add more than one interest, ensure the cursor is in the field, F2 to the open and the Edit List. Hold down the control key and click the appropriate options.

- Salesperson – The sales person will automatically be completed as the user logged into the system.

- Club – The club will automatically be populated as the club at which the prospect is added.

- Origin Date – This will be populated as the date and time that the prospect is saved.

14.1.5. SAVING THE PROSPECT

To save the prospect information then click on the disk in the top left to save the information. At the bottom of screen a message will be displayed to confirm the saving of the prospect.

14.2.   HOW TO SCHEDULE AN INCOMING CALL

Ensure you are on the contact screen for the contact you wish to schedule an incoming call.
From the contact screen click on the 'schedule a call' icon. The following screen will appear (just below to the right)

Date/Time/Duration - Ensure the correct Date & Time of the incoming call is inputted.

- With - This will default to the contact name.

- Regarding - Select the correct option from the drop down menu. This will depend of whether you gained an appointment or not

- Click 'OK'

- Description – Enter in here details of what happened in the call or notes that might be relevant for a follow up etc.

14.2.1.HOW TO CLEAR AN INCOMING CALL

- Ensure you are on the correct contact.
- From the contact or contact list screens click on the activities tab.
- Select the Activity - Clear the incoming call activity straight away.
- Double click on the activity to view the details about the activity.
- Complete the Activity.

- Select Edit and then set the Activity Result to Held. If there is a follow up activity to schedule tick the "Schedule a follow-up activity" box and a new blank activity screen will be loaded.
- Schedule Follow-Up Activity.
- If there is a follow up activity to schedule tick the "Schedule a follow-up activity" box and a new blank activity screen will be loaded. If not click on OK to save the calls result.

Date/Time	Duration	Activity Type	Regarding
05-Sep-11 08:30	30 Minutes	Meeting	Appointed Tour

14.2.2.HOW TO CONVERT TO A MEMBER

Ensure you are on the contact screen for the contact that is to become a member.

From the contact screen click on the convert to member option.
This will launch the New Member Wizard (NMW) for the conversion of the prospect to a member. (Note the status of the contact cannot be Member or New Member when starting the convert to member process, this will automatically be amended later).

15. LEGEND SUPPORT

We have a helpdesk that you can contact with any Legend related queries:

Legend Support Contact – 01904 529575

- Monday – Friday   06:00-22:00
- Saturday & Sunday   08:00-20:00

If your issue is not urgent or may require detailed investigation you can log a support ticket, there is an icon on your Legend desktop that you can open called 'Log a Support Ticket', you can also access the site by browsing to www.legendware.co.uk/support.