

Getting Started with ALAMIS: Your User-Friendly Guide

Introduction: What is ALAMIS and Why It Matters

Welcome to the American Legion Auxiliary Management Information System (ALAMIS)! This guide is designed to walk you through the essential functions of the system, helping you get started with confidence and manage your unit's information effectively.

ALAMIS is the primary system used by units and departments to manage member and leadership information. It is your central hub for keeping records accurate, processing payments, and understanding your membership landscape. Its core capabilities allow you to:

- **Make Updates:** Add new members, update contact information, change magazine preferences, update solicitation preferences, manage mail/phone call requests, and assign or edit unit leadership positions. This ensures your records are always current.
- **Perform Searches:** Go beyond simple lookups to verify if dues have been applied, view a member's continuous years of membership, check their paid-through date, and identify members in special categories like Paid Up For Life (PUFL).
- **View Reports:** Generate valuable reports like unit rosters and dues payment lists. You can export these reports to Excel, Word, or PDF, which is incredibly useful for creating mail merges, email lists, or mailing labels for your members.

Now that you have an overview of what's possible, let's begin with the first step: logging in.

1. Gaining Access to ALAMIS

Accessing the system is straightforward. Follow these steps to log in:

1. **Navigate to the Login Page:** Open your web browser and go to the official ALAMIS portal: <https://members.legionaux.org>.
2. **Enter Your Credentials:** The login screen will appear. Enter your assigned Username and Password into the appropriate fields.
3. **Submit and Log In.**

Login Pro-Tips

- Usernames are **NOT** case-sensitive.
- Passwords **ARE** case-sensitive.
- **Security First:** Do **NOT** share your password with other members of your unit.
- **New Users:** If a new user is appointed, you must contact your Department Headquarters to get a new ALAMIS account created for them.

With successful login, you're ready to start managing your unit's information.

2. Core Task: Managing Your Members

Member management is one of the most important functions you will perform in ALAMIS. This section covers how to add new members and edit the profiles of existing ones.

2.1. How to Add a New Member

Adding a new member is a simple, four-step process. Before you begin, be sure you have all the necessary information handy.

1. **Step 1: Gather Information & Navigate.**
 - Navigate to **Members > Add New Member**.
 - You will need the following five pieces of information to complete the process:
 - Member Name
 - Member Date of Birth (Required for Junior Members)
 - Member Contact Information
 - Eligibility Information
 - Join Date
 - After being added, the new member's status will be set to "Pending".
2. **Step 2: Enter Member Details.**
 - Fill out the new member form. Required fields are marked with an asterisk (*).
 - After you complete the form and click "Add Person", the new member's name will appear in a list at the bottom of the screen.
 - You must click **Continue** to proceed to the next step.
3. **Step 3: Set the Join Date.**
 - This date is critical, as it determines the dues year for which the new member will be billed.
 - **The Join Date is the date you enter the member into the system.**
4. **Step 4: Verify and Complete.**
 - Carefully verify all the information for accuracy.
 - Digitally sign the entry by typing your name and the date exactly as shown.
 - Click **Continue**.
 - The member is not fully entered into the system until this step is completed and you receive a screen that says "receipt."

Once you've added new members, you may need to update information for existing members from time to time.

2.2. How to Edit an Existing Member's Profile

To update a member's information, navigate to **Members > Edit Member Info > Edit Member Profile**.

This screen displays a list of all current active members in your unit. You can find a specific member using one of three methods:

- Scrolling down the alphabetical list.
- Using the **Filter** to display only Senior or Junior Members (especially useful for larger units).

- Typing any part of the member's first or last name in the **Find** box.

Once you select a member, their profile data is organized into the following 5 tabs.

Tab Name	Editable Fields	Important Notes / Action Required
Member	First/Middle/Last Name, Informal First Name, Home Phone, Cell Phone, Email Address	Some fields, like Membership ID and Membership Type, are read-only.
Address	Permanent Address, Alternate Address, Seasonal Address	After entering a Seasonal Address , you MUST go to the Communication tab to enter the seasonal begin and end dates.
Background	Volunteer Interests, Branch Service/Legion Information, Related Type	Join Date is a critical field. To change it, you must Contact NHQ .
Personal	Marital Status, Date of Birth	Changing the Date of Birth will automatically update the member's age in years.
Communication	Magazine Preference, No Mail/Calls selections, Seasonal Dates	Use Magazine Preference to let members receive a link to the online magazine instead of a physical copy. Use the seasonal date fields to control when mail is sent to a seasonal address.

3. Core Task: Managing Unit Leadership

Keeping your unit's leadership roster up-to-date in ALAMIS is essential for proper communication and record-keeping.

- Step 1: Select Positions.**
 - A list of all available Unit-level leadership positions will be displayed.
 - To edit or assign new leaders, check the box next to the position(s) you wish to change and click **Continue**.
- Step 2: Assign New Leaders.**

- Click the **Find a Member** link next to a leadership position to search for and assign a new leader.
 - It is best to do this one position at a time to ensure accuracy.
3. **Step 3: Set the Effective Date.**
- You must enter an effective date for each leadership change. This date serves as both the end date for the old position holder and the begin date for the new one.
4. **Step 4: Validate and Submit.**
- Review all information to ensure accuracy.
 - Enter your electronic signature exactly as it appears on the screen.
 - Click "Continue" to submit your transaction.

Please allow 15-20 minutes for the changes to take effect and wait until the next day (overnight) before running any leadership reports to ensure accuracy. If you require an accurate leadership report on the same day as the position change, you must send a request directly to the ALAMIS helpdesk.

Now that your internal leadership data is current, the next step is to manage your membership payments and transmittals.

4. Core Task: Processing Payments & Transmittals Online

This section covers the process for submitting membership transmittals and payments online, which is the most efficient way to handle dues.

The complete online transmittal process involves five key steps:

1. First, make any required changes to members in ALAMIS (e.g., add new members, update addresses).
2. Complete your membership transmittal using either the fillable online form or a paper form.
3. Make your payment via **ECheck**. (Note: A \$35 return check fee will apply if the check does not clear the bank).
4. Alternatively, make your payment via **CREDIT CARD**. (Note: Processing fees will apply).
5. Password to pay by Credit Card is **CCpayment**
6. Submit the completed Unit Transmittal Form and any New Member Applications to membership@alatexas.org.

Key Payment Instructions

When making payments online, follow these critical instructions to ensure your transmittal can be processed correctly.

- When paying for miscellaneous items (e.g., Bond Fee, ALAMIS, etc.), you **must** list what you are paying for in the comments/description field.
- When paying for membership dues, enter the specific number of Juniors and Seniors you are paying for.

- If using a membership credit (e.g., "\$5 Credit Used"), you **must** note the amount used in the comments section. This helps the finance committee and bookkeeper reconcile the transmittal.
- If you pay electronically and email the transmittal, you **DO NOT** need to mail a physical copy as well.

CRITICAL NOTE: Your membership cannot be processed until **both** payment and the transmittal paperwork are received.

With your member data and payments managed, you can leverage ALAMIS reporting to gain insights into your unit.

5. Understanding and Using Reports

ALAMIS provides several valuable reports to help you manage your unit effectively. These reports give you a clear picture of your membership status at any time.

Report Name	What It's For (And Why It's Useful)
Membership Roster	Provides a complete list of all members in the unit, including juniors. It excludes expired and former members, giving you a clean list of your current, active membership base.
Leadership Roster	Includes the names, contact information, and positions for all unit leaders. This is your go-to report for quickly identifying who is in charge of various functions.
Unit Paid Dues Roster	Lists all members in the unit who have paid their dues for the year you select. It is the best way to track who has renewed their membership.
Unit Unpaid Dues Roster	Lists all members who have not yet paid their dues for the selected year. This report is essential for conducting membership renewal campaigns and follow-ups.

All reports can be exported to Excel, Word, or PDF. Exporting to Excel is particularly useful for creating mail merges, custom email lists, or printing mailing labels.

With a firm grasp on managing members, leadership, and reports, let's review some important departmental policies and how to get help.

6. Important Policies & Getting Help

Finally, here are some key departmental policies and information on where to turn for support.

6.1. Membership Credits Policy

Please take note of the official policy regarding the use of membership credits.

- The Department's fiscal year is **September 1 to August 31**.
- All membership credits **must be used by August 31st** of the membership year in which they are received. For example, any 2024 dues credits must be used by August 31st, 2024.
- Any unused dues credits at the end of the fiscal year will be considered a donation to the general fund.

6.2. Questions and Support

If you have questions or run into any issues while using ALAMIS, please do not hesitate to reach out for assistance.

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