

# Ron Barden

Rotary Club of Clayton District Communications Officer (DaCdb) 2017-18 Area III Assistant Governor 2017-18

## Technology & DaCdb: DaCdb New Member Form



February 2017

ERVING

#### DaCdb New Member FORM (NewMember FORM tab)

One of the DaCdb updates released after July 2016 is the "New Member Form". This form is used to capture information about a new member that can be entered in the new member's DaCdb record. Previously this form was emailed or printed and handed to a new member for completion. Once completed, the club secretary would enter the information into DaCdb. The new version still allows the distribution and manual entry of information from the old form. The new version has the added convenience of electronically collecting and uploading a new record to the DaCdb database.

There are three ways the electronic record can be generated:

- The club secretary or designee can complete an online PDF document and submit it directly to the database
- An email can be generated in DaCdb and sent to a new member with a link to an online document for completion and submission.
- An email can be sent from Outlook, Gmail, or other preferred email providers to a new member with a weblink to the online document.

In all three submission choices above, a proposed member record will be electronically generated in the DaCdb database reducing the chances of mistyped information. The record will be placed under the "Proposed Members" tab and an email will be sent to the new member and the designated club officers.















The steps in the next four pages need only to be completed in the initial setup of the online New Member Form:

- Select from the DaCdb provided information what the club wants to include in the online New Member Form
- Customize the reply email sent to the new member after completing and submitting the online New Member Form



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vour clu	vour club's needs			Postal Code:		Previous Club 2:				
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		Business Information		Vacation Address		Club Achievements:				
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www.directory-online.com/Rotary/NewA	Member/Setup.cfm?UserID=0	Please check th	below next to your preferred mailing address					







The next sections will provide three choices on how the club would like to capture the information on the online <u>New Member Form</u>

- The club secretary or designee can complete an online PDF document and submit it directly to the database.
- An email can be generated in DaCdb and sent to a new member with a link to an online document for completing and submission.
- An email can be sent from Outlook, Gmail, or other preferred email providers to a new member with a weblink to the online document.



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MEMBERSHIP APPLICATION CONFIRMATION **The Rotary Club of Clayton** P.O. Box 1088 Clayton, GA 30525 Email Club Secretary Terry Thornton; ohiomary@v \_\_\_\_\_\_t Or Membership Chair Pam Wright: pam.wright@\_\_\_\_\_\_.com

#### Dear **XXXXXXXXXXXXX**

Thank you for applying for membership with the **Rotary Club of Clayton.** We appreciate your interest in our club. Your application has been submitted to the club officers for review. They will be in contact with you shortly. If you have any questions or need assistance regarding your membership, please let us know.

Regards,

Example of email sent to new or prospective members after they submitted the online New Member Form

The Rotary Club of Clayton



Clayton New Member Application <mailservice@directory-online.com>

Proposed Member Application: ууууууууу, хоооооооооо

fo ohiomary@windstream.net; pam.wright@oconeefederal.com; ronbarden.1217@gmail.com

#### Dear Club Officer;

This is an automated message from DACdb.

Example of email sent to club officers after the online New Member Form is submitted

has been submitted. You can find this application under My Club in the "Proposed" tab.



An email can be sent from Outlook, Gmail, or other Preferred email providers to a new member with a weblink to the online document.

#### Email a Link to the New Member

Send an email using GMAIL, Outlook, or your preferred email provider. Embed the link below into your email. A personalized email can be sent to the new member by the club secretary, membership chair, or the new member's sponsor.

**Example link from the Rotary Club of Clayton – Club #4158:** 

http://IsMyRotaryClub.org/NewMember/?AccountID=D6910&ClubID=4158

Replace the club number 4158 with your club number



In one of the first slides of this presentation, we noted "<u>A new tab will be inserted in this</u> process". After the completion and submission of an online New Member Form, the "Proposed Members" tab will be inserted between the "Other Members" and "Terminated Members" tabs and will remain there until all New Member Form records are processed.







Clicking the Proposed Members tab will display records received from the submission of the online New Member Form.

Before changing the "Member Type" and entering the "Start Date" check each Member tab at the top of the record (not the top of the screen) for any mistypes. The more information in the record, the better DaCdb's program can determine whether there is or is not a matching record in the RI database for this individual. Running Member Compare [My Club tab/RI Integration tab (on the left side of the screen)/Member Compare tab] 10 to 15 minutes after submitting the new record will complete the add new member process providing a RI number for a new Rotarian.











# **END OF THIS PRESENTATION**

