BTW the new member has to be added to DACdb first and must include member name, email address and home address in order for the system to accept.

Robert S. Borish, President

Rotary Club of Atascadero

805-460-6430 Office

949-456-0398 Cell

---- On Fri, 17 Nov 2023 09:36:44 -0800 **Robert Borish <****rborish@northcountytax.com****>** wrote ---

I just finished my zoom call with Rachelle.  Here are the take aways:

* JP the template you are using for new members is outdated and should not be used.  Rachelle would like to know where you found the procedure on the DACdb website so it can be taken down.
* To add new members, go to Pmail, click on "select template" and change "template type" from Club to System.  Then select th#5 template "DACdb log in for members" and send out the email.  The new member does not need an RI number to set up the log in.   I always add this to the email: "If you have trouble logging in, send an email to "support@dacdb.com".  For some reason there seem to be issues with this procedure.  Rachelle-any thoughts on this?
* After the email is sent, click on the RI Compare icon to push the new member to RI.
* The system will not allow you to enter a start date that is more than 30 days old.  You have to enter a dummy (more current) start date and then send an email to data@rotary.org to advise of the correct start date.  Include the member name, RI# and correct start date in the email.  I believe you can then go back and enter the correct start date.
* There are several issues with RI compare that we need to address, where member data in DACdb does not match RI".
* In order for the new member to receive the Rotary Magazine they have to either: 1) Request the magazine by emailing data@rotary.org, or 2) Logging in to myrotary.org.  NOt sure where that is on the website-Rachelle can you send us a link?

JP maybe you can cut and paste this and put in Club Files in DACdb.  Make a "procedures" tab??

Best regards,

Robert S. Borish, President

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