**Instruction for linking membership date between DACdb and MyRotary**

**DACdb**

* Login to DACdb – go to [www.dacdb.com](http://www.dacdb.com) and use your email address as your username. Click on forgot password, enter your email address, and follow the instructions in the email you receive to set the password you would like. If you have trouble logging in, let me know because there may be an issue with your email that I can correct.
* Click on MY CLUB tab in upper left
* In the MY CLUB NAVIGATION pane on the left, open the ADMIN FUNCTIONS drop down
* Click on EDIT CLUB
* On the screen that comes up (Information Tab) scroll down to ROTARY INTERFACE and change it to RI “DIRECT CONNECT”
  + Clubs using ClubRunner should change this to Read-Only
* Scroll back to the top and click UPDATE in the upper right

**MY ROTARY** – you must be club pres, sec, treas or exec sec to do this

* Login in to MyRotary
* hover over MANAGE to get the drop down and then click on CLUB ADMINISTRATION
* go to the UPDATE CLUB DATA section under CLUB & MEMBER DATA and click on DESIGNATE A CLUB MANAGEMENT VENDOR
* scroll to the bottom of the page and under EDIT CLUB MANAGEMENT SYSTEMS, click on ADD VENDOR in the bottom right
* on the ADD CLUB MANAGEMENT VENDOR screen open the drop down next to SELECT and choose DACdb
* under VENDOR ACCESS LEVEL choose VIEW & EDIT ACCESS
  + Clubs using ClubRunner should choose View-Only Access
* Scroll down to LIABILITY OF DAMAGES and check the CERTIFICATION box
* Click on I AGREE
* DACdb may not show up immediately as your Club Management System on your screen. You may have to wait a few hours and check back to make sure it shows up.

**How to run RI Compare to make sure all of your club membership data matches between DACdb & MyRotary**

This should be done once a month so that data is kept up to date in both systems, ClubRunner clubs need to do this also

**DACdb**

* Click on the MY CLUB tab and then CLUB MEMBERS
  + You can also use the MY CLUB NAVIGATION pane at the left and click on MY CLUB MEMBERS
* First look to see if you have any duplicate members (duplicate will be in red on the right). Check the Start Date and delete the one with the incorrect Start Date by clicking on the red X on the left. Put in that day’s date and choose Duplicate Record in DACdb. If you’re not certain, don’t delete and let me help you.
* In the MY CLUB NAVIGATION pane on the left click on RI INTEGRATION to get the drop down and click on MEMBER COMPARE
* You need to do a COMPARE on anyone with red items in the **‘!=’** column.
  + Click on COMPARE to the left of the name
  + For any item that has right or left arrows in a pink box, you should determine which information is correct and click the arrow pointing right to update DACdb or the arrow pointing left to update RI
    - You cannot remove the primary address or primary email from RI. That information can only be change in MyRotary
  + Once done if there are still red items for the person you did the Compare on, it may require changes in their DACdb information to fix everything. We will work on this at a later date.
* For **CLUB RUNNER** clubs you still need to do the RI COMPARE but first all data must be correct in MyRotary and ClubRunner. Do not update member data in DACdb. You should only run the COMPARE and push data from MyRotary to DACdb.

**Additional DACdb Member Compare instructions**

Look to see if you have anyone at the top of the compare page that has the following:

**Your options:**

|  |  |
| --- | --- |
| 1. | Cannot Add to RI, Start Date > 30 days |
| 2. | [TERMINATE in DACdb](https://www.dacdb.com/Club/RICompare2.cfm?Type=Member&ClubID=29728) |

If they are no longer members of your club, terminate them from DACdb.  The date you enter and reason for termination don’t matter so use the current day’s date and whatever reason you want. If any of them are still members, leave them as is and we will have to work with [data@rotary.org](mailto:data@rotary.org) to fix the problem in MyRotary.

If you’ve done the Compare on a member and there is still something showing in red you may need to do the following:

* Open your member list
* Click on the pencil next to the person who’s information is not syncing completely
* Go to the Contact tab
* In the Contact Preferences section, make sure Preferred Email, Preferred Address and either Home Address or Office Address have information in those fields.  Choose Home or Office Address depending on which type of address is in the contact information above.
* Click on UPDATE in the upper right

This should remove most conflicts, but further tweaking may be needed in either Member Compare or in the member record.

Look carefully and see if all members have an email showing on the club member list. If not, you will need to follow the steps above to add their email in the Contact Preferences section.

**Member Login**

If members are having issues logging in, it may be because their email is not populated as their username. Click on the edit pencil for the member having an issue and go to the LOGIN tab. Make sure their email is in the username field. If you get an error message telling you the email is already in use, contact me. There is a way for me to check to see why that error is happening.

If you have concerns about making mistakes, please email me or give me a call.

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