

District and Club database

New Member Application Advanced User Documentation

***NEW* Online Member Application**

To welcome in the New Year, DACdb is introducing a new online member application form. This online form replaces the PDF application that has been used for many years.

A link to this form can be sent to prospective members to complete. The completed application is submitted online, and will create a new 'Proposed' member record in DACdb that will appear under My Club in a new Proposed Member tab.

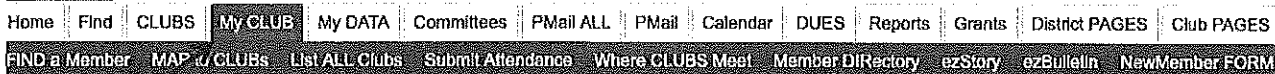
This document will guide you through customizing the online application to fit your Club's preferences, and sharing the form with prospective members.

Summary

- The new online member application replaces the .pdf version previously available. A link to the old form is still available.
- Each club can customize the online application:
 - Turn on (or off) input fields according to your club's preferences. This is the first and easiest way to make changes to the application form.
 - Users with HTML knowledge can create a new version of the application that conforms more with the club's unique requirements and needs.
- The application (or customized version) can be shared using PMail (or regular email) through a public link to this form. No login or knowledge of DACdb is required to complete and submit the form to the club.
- Once the prospective member submits the application, a user account is created, eliminating the need for repeated data entry.
- The Club secretary (or designee) and the prospective member will receive confirmation of application. The prospective member will remain 'proposed' until you change the status to 'active'.
- To make a member 'active', the MemberType is changed from 'proposed' to 'active' along with updating the Start Date (Date of Admission) on the member record.
- Note: Remember, this does not automatically assign an RI number. RI will do this within a week, and you will be able to retrieve it through the RI Member Compare. It's OK that the member ID is zero!

Online Application Location

Find the application template by clicking 'My Club' and 'NewMemberFORM' in the blue submenu. It replaces the OLD PDF link.





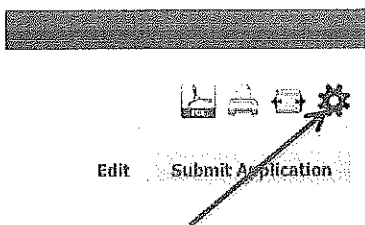
District and Club database

New Member Application Advanced User Documentation

Configure the Online Application

You can customize the application form two ways:

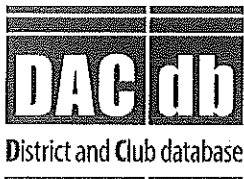
- 1) Remove (or add) fields on the form. For example, you might not want to show the Province field if your club is based in the US. You might also want to remove the Country Code fields (USA is the default). To make these field changes, click the Cog Wheel in the top right corner.



After clicking this, a pop-up screen will appear, with a list of fields for the application. Check the boxes to show fields, uncheck boxes to remove the field. When finished, click 'set as Club Default' on the bottom right.

Field Name	Visible
Member Information	
Title:	<input checked="" type="checkbox"/>
First Name:	<input checked="" type="checkbox"/>
Middle Name:	<input checked="" type="checkbox"/>
Last Name:	<input checked="" type="checkbox"/>
Suffix:	<input checked="" type="checkbox"/>
Badge Title / Nick Name:	<input checked="" type="checkbox"/>
Birthdate:	<input checked="" type="checkbox"/>
Gender:	<input checked="" type="checkbox"/>
Contact Information	
Email:	<input checked="" type="checkbox"/>
Home Phone:	<input checked="" type="checkbox"/>
Office Phone:	<input type="checkbox"/>
Cell Phone:	<input type="checkbox"/>

- 2) To make more substantial changes, you will need to edit the current form. Editing and saving the application form makes it unique to your club. Each club can have their own customized version. Click the EDIT button to invoke the HTML editor allowing you to make changes.



District and Club database

New Member Application Advanced User Documentation

New Member Entry Form

New Member Entry Form. Using System Template.
Link to PDF form, click [here](#)



Edit Submit Application

Reading System Template



ROTARY CLUB OF

MEMBER INFORMATION FOR DACdb System

Using the HTML editor, make the changes to the form as needed. Right clicking on some fields will bring up a table editor allowing you to insert, delete, and split cells. The Source Editor will allow you to directly manipulate the HTML.

New Member Entry Form Edit

New Member Entry Form. Reading System Template

Reload System Template Save

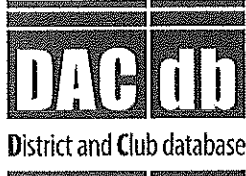
The screenshot shows an HTML editor with a toolbar containing icons for undo, redo, bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and source code. Below the toolbar are dropdown menus for Styles, Format, Font, and Size. The main editing area shows a preview of the form with the Rotary Club logo on the left and the following text centered: "ROTARY CLUB OF { ClubName }", "MEMBER INFORMATION FOR DACdb System", and "ROTARY MEMBERSHIP APPLICATION".

When you are done, click 'Save' to save the form. If you need to, use the Reload System Template to restore the default template as your club's application.

Rules, Rules and more Rules!

If you are going to edit the form, there are a few rules to consider.

- 1) **Required:** If you want to have a field required, include on the <INPUT> or <SELECT> the word 'required'.



District and Club database

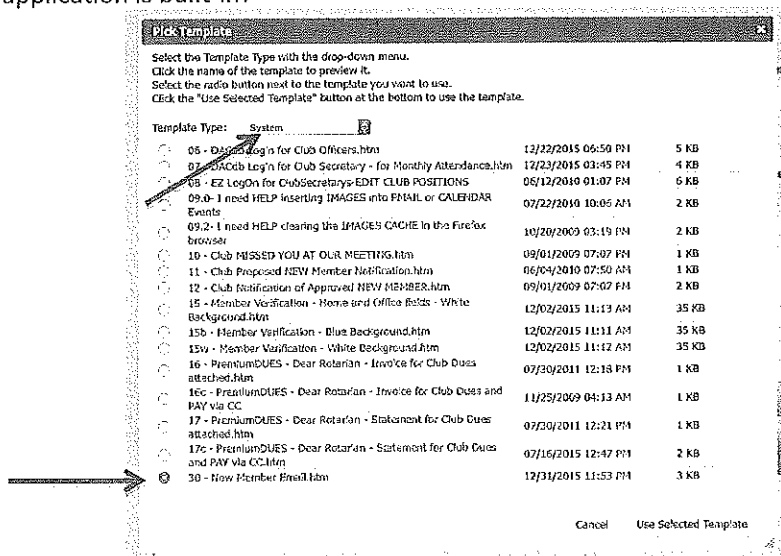
New Member Application Advanced User Documentation

- 2) **Unique Name:** If you add new fields, we will detect and include those. However, the field names cannot duplicate the fields already defined (scan the form). Use unique names.
- 3) **ID and Name:** on the <INPUT> and <SELECT>, enter BOTH the id='name' and name='name', where name is your new field name. *If this is Greek, stop and call support.*

Share the Online Application

Done with configuration? You are now ready to use the online application.

- 1) **PMail:** Open PMail, and select the 'System Templates' folder. Select the email titled '30- New Member Email'. Modify the PMail with your preferences and send to the prospective member. The link to your unique application is built-in!



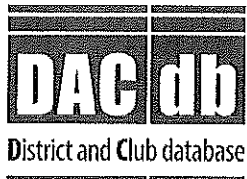
- 2) **Email Link:** Send an email using GMAIL, Outlook, or your preferred email provider. Embed the following link into your email. Replace {%AccountID%} with your District number and {%ClubID%} with you club number. *Both are required.*

Example: <http://IsMyRotaryClub.org/NewMember/?AccountID={%9999%}&ClubID={%1234%}>

<http://IsMyRotaryClub.org/NewMember/?AccountID={%AccountID%}&ClubID={%ClubID%}>

- 3) **Website:** You can add the application link to your website. Replace {%AccountID%} with your District number and {%ClubID%} with you club number. *Both are required.*

<http://IsMyRotaryClub.org/NewMember/?AccountID={%AccountID%}&ClubID={%ClubID%}>










District and Club database

New Member Application Advanced User Documentation

After the Application is Submitted

After the proposed member submits the application, the proposed member record will appear in a *New* 'Proposed Members' tab under My Club. This tab will appear *only* when there are proposed members. Once all the proposed members are made Active (or deleted), this tab will disappear until the next proposed member is entered.

Active/Honorary Members		Other Members		Proposed Members		Terminated Members	
#	<input type="checkbox"/>	Action	Member Name	Member type	Position	Home Phone	
1	<input checked="" type="checkbox"/>	    	Landmann, mark	Proposed			

The new ICON  in the Action column is a link back to the Member Application. From there, the member application can be updated and/or printed as a PDF for your files. Of course, the proposed member record can be edited using the pencil edit ICON .

