# MyDAV.org and Membership Portal Training

## Membership Department
August 5, 2022 ✪

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**Assistance:**

- Orlando M (Registration on Convention Level)
  - Friday through Monday 8am – 4pm
  - Tuesday 8am – 10am

**Key benefits:**

- Improve communications throughout the DAV membership organization.

- Standardize website naming convention across all Department and Chapter websites.

- Eliminate undesirable web content or website domain names.

- Provide a web presence to Departments and Chapters who lack the resources to create their own.

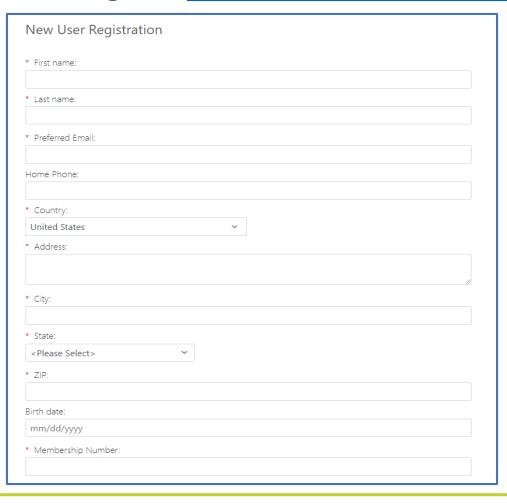- Provide even higher levels of quality service to America's veterans and their families.

MyDAV.org

- What is it? – A self-service and reports repository for members and member leaders
- Who has access?
  - All DAV and Auxiliary members
  - DAV and Auxiliary Department & Chapter/Unit officers have expanded, role-based access

# Complete the User Registration

Link to register: https://www.mydav.org/member-registration

New User Registration

* First name:

* Last name:

* Preferred Email:

Home Phone:

* Country:

United States

* Address:

* City:

* State:

<Please Select>

* ZIP:

Birth date:

mm/dd/yyyy

* Membership Number:

- Enter your name and contact information

- Be sure to enter the correct membership number

# Complete the User Registration

**Account Information**

\* Username:

\* Password:

12 characters or more.

\* Confirm Password:

**SUBMIT**

User Login

Create a **Username** and **Password**

- Emails are commonly used for usernames

- Passwords must be at least 12 characters long and include a special character

# New User Registration Email

After submitting the registration, you will receive the following email:

### New User Registration Email

**Subject**: DAV/DAV Auxiliary MyDAV.org Portal Registration

**From name**: DAV

**From address**: MembershipAssistant@dav.org

Thank you for joining our online community. We appreciate your patience while we process your sign-up request, which might take up to 2 business days. You will receive another email confirmation when the process is complete. At that point, you will be able to log in to the MyDAV.org portal to access your profile and other areas of the community.

We have included your username below for your reference.

Username: <username>

# Registration Confirmation

- Allow 2 business days for your registration to be processed.
- Once your registration has been processed, you will receive an email confirming access to the Membership MyDAV.org portal.

Registration Confirmation

**Subject**: DAV/DAV Auxiliary MyDAV.org Portal Registration

**From name**: DAV

**From address**: MembershipAssistant@dav.org

Welcome to the DAV/DAV Auxiliary MyDAV.org Portal!

Your MyDAV.org portal account request has been processed. You can now log into the portal to view your profile and update your details. If you have forgotten your password, you can submit a password reset request from the login page.

Log in Now

We look forward to interacting with you and hope that you enjoy the MyDAV.org portal.

The login link that is included in the automated confirmation email is: https://www.mydav.org/login

# The Login Screen



- Use your new **Username** and **Password** to access MyDAV.org

- Don't check the **Remember login** field if you are on a shared computer

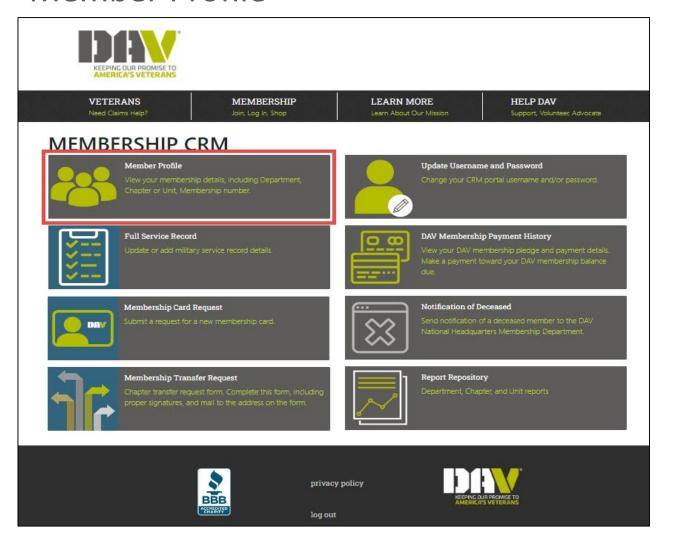- If you forget your password you can now reset your own password

# Home Screen



- After you log in you will be on the main page where you can access all the functions within the application

- Access is based on criteria set up in MyDAV.org that is reflective of your role(s) within DAV
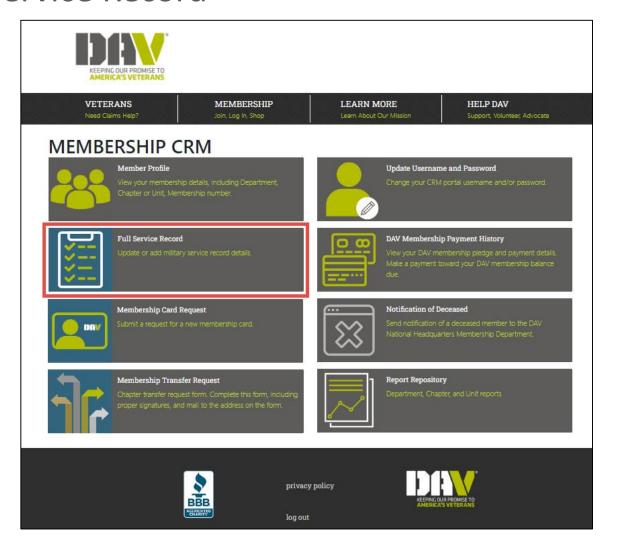
# Member Profile

# Member Profile



- View membership information

- This example shows someone with multiple memberships

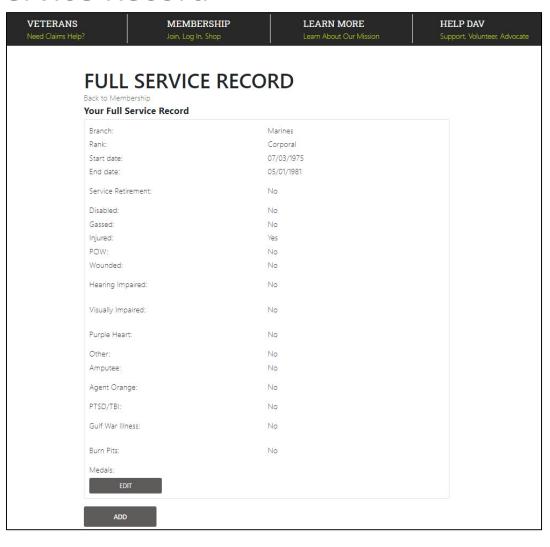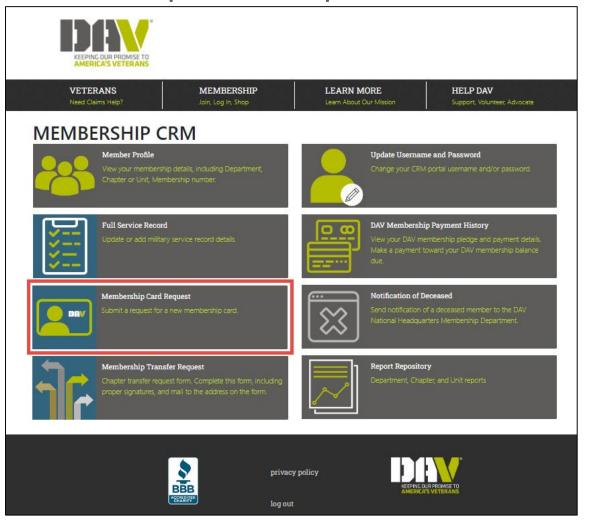# Service Record

# Service Record



- Review your full service record

- If we don't have your information, click **Add** to enter your service information

- If needed, click **Edit** to make any changes or additions to an existing record
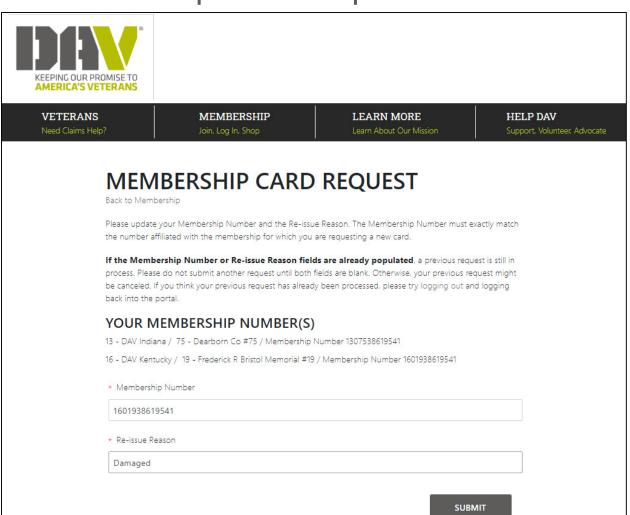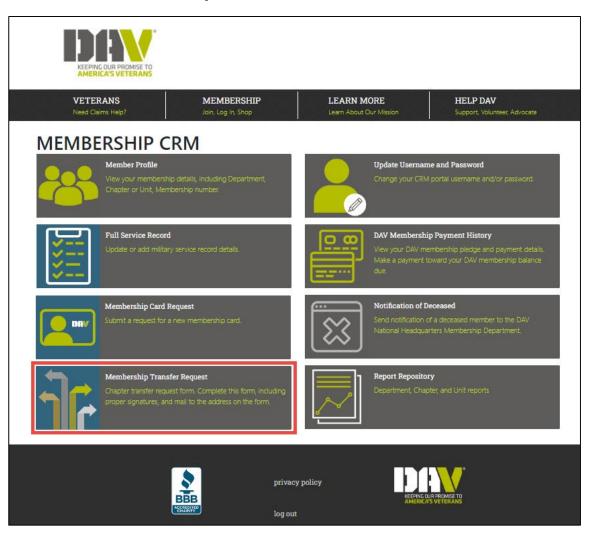
# Membership Card Request
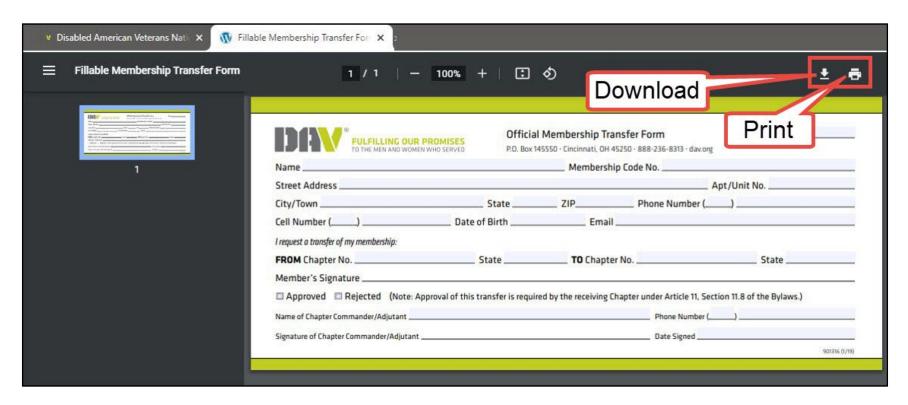
# Membership Card Request



- Make sure to enter the full **Membership Number**

- Enter a **Re-issue Reason**, such as lost, damaged, or stolen.
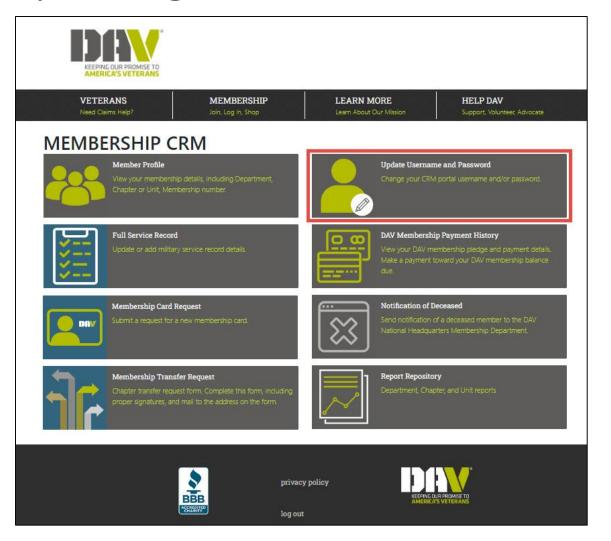
# Transfer Request

# Transfer Request



- After filling in the necessary information, print the form and mail it in to the address listed on the form after getting the appropriate signatures

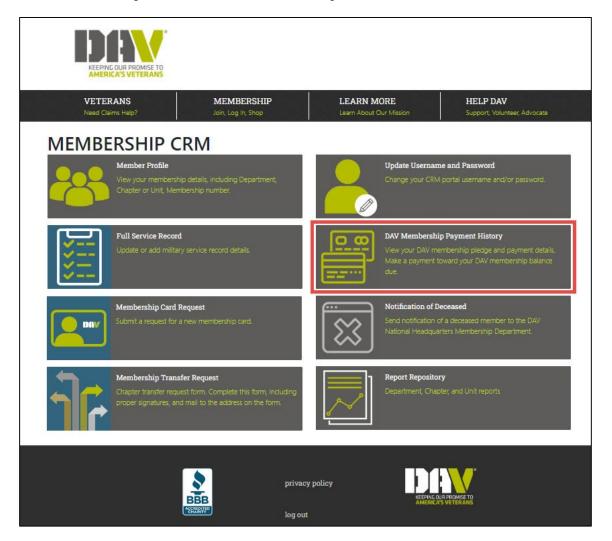- This form can also be downloaded and saved for future use

# Update Login Information

# Update Login Information



- Type your new **Username** and/or **Password** and enter the new password again in the **Confirm Password** field.
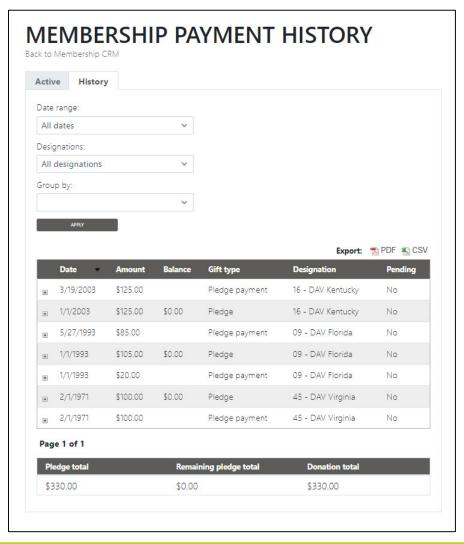- The password must be 12 or more characters.
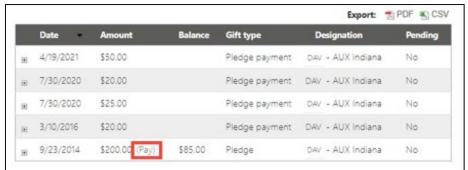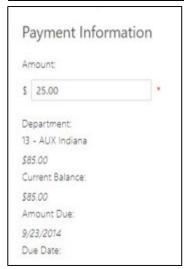- Click **Submit**.

# View Payment History

# View Payment History



**MEMBERSHIP PAYMENT HISTORY**
Back to Membership CRM

| Active | History |

Date range:
All dates

Designations:
All designations

Group by:

APPLY

Export: PDF CSV

| | Date | Amount | Balance | Gift type | Designation | Pending |
|---|---|---|---|---|---|---|
| | 3/19/2003 | $125.00 | | Pledge payment | 16 - DAV Kentucky | No |
| | 1/1/2003 | $125.00 | $0.00 | Pledge | 16 - DAV Kentucky | No |
| | 5/27/1993 | $85.00 | | Pledge payment | 09 - DAV Florida | No |
| | 1/1/1993 | $105.00 | $0.00 | Pledge | 09 - DAV Florida | No |
| | 1/1/1993 | $20.00 | | Pledge payment | 09 - DAV Florida | No |
| | 2/1/1971 | $100.00 | $0.00 | Pledge | 45 - DAV Virginia | No |
| | 2/1/1971 | $100.00 | | Pledge payment | 45 - DAV Virginia | No |

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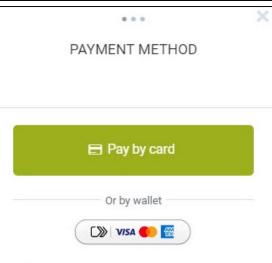| Pledge total | Remaining pledge total | Donation total |
|---|---|---|
| $330.00 | $0.00 | $330.00 |

- In this example, the member has a membership in three different departments

- Pledge = Membership

- Pledge payment = Payment toward the membership

- Designation = department the membership is in

- You can also view all dues statements history for your membership record(s).
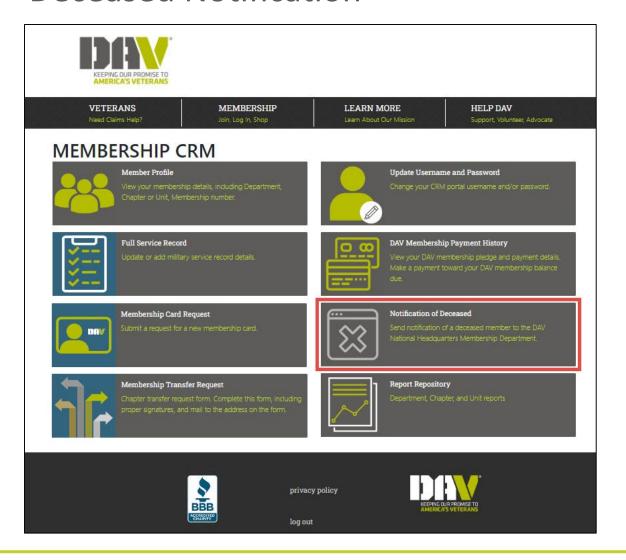
# Make a Payment



- If there is an outstanding balance there is an option to make a payment

- Note that the amount defaults to the total outstanding balance, edit to make a different amount
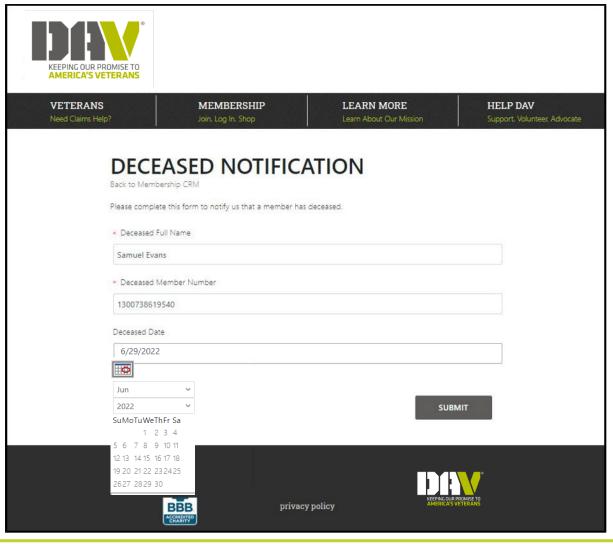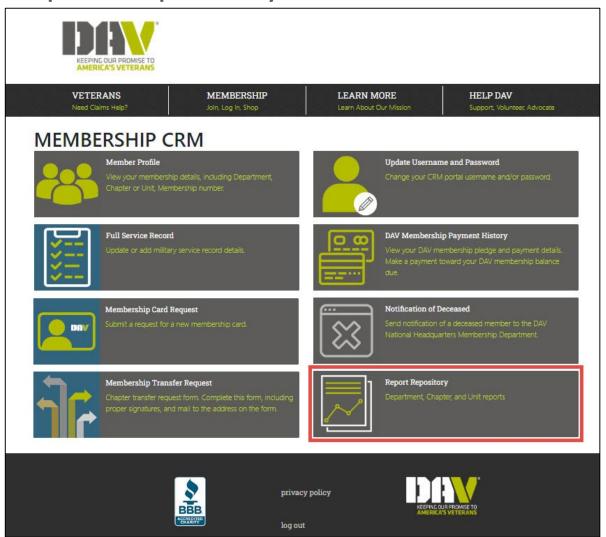
# Deceased Notification

# Deceased Notification



- Ability to notify NHQ of the death of a member

- Enter the full **Name** and full **Member Number**,

- If known provide the **Deceased Date**

- If you go back to submit another member, the previous member's details may still be there. Clear the information and enter the next notification.
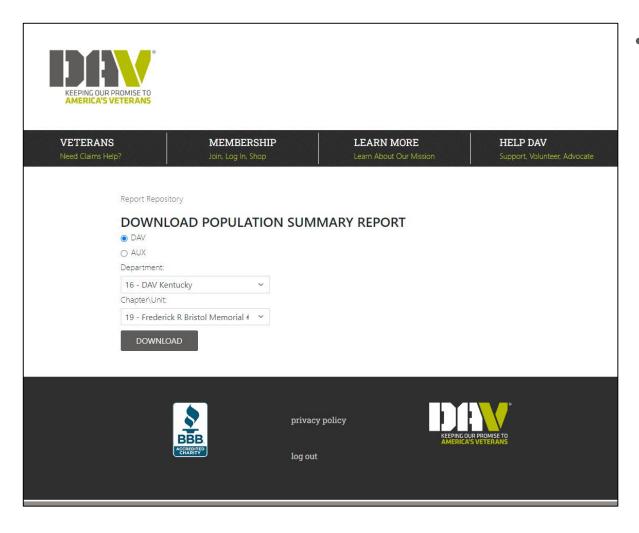
# Report Repository

# Report Repository



- Additional reports coming soon

- This section is only accessible by department /chapter officers
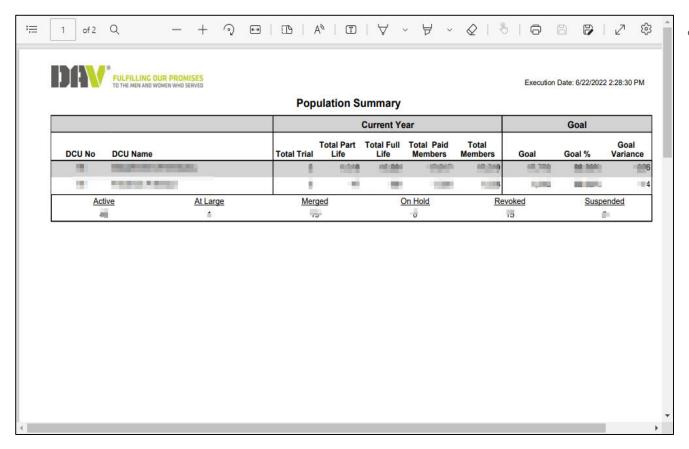
# Population Summary Report



- Summary of the member population in a department /chapter. It also lists the new member goal for each department /unit
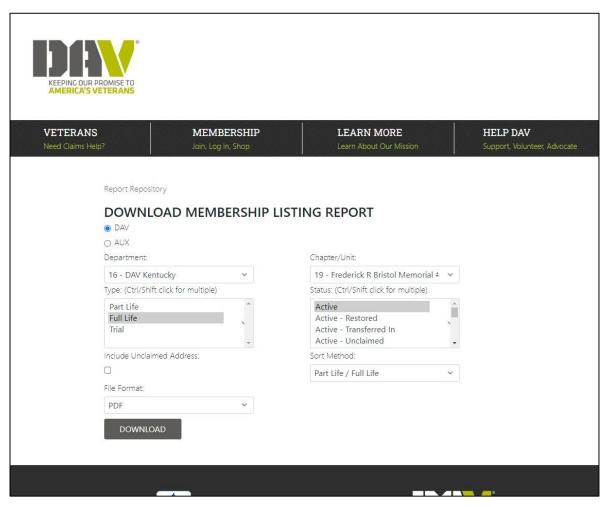
## Population Summary Report
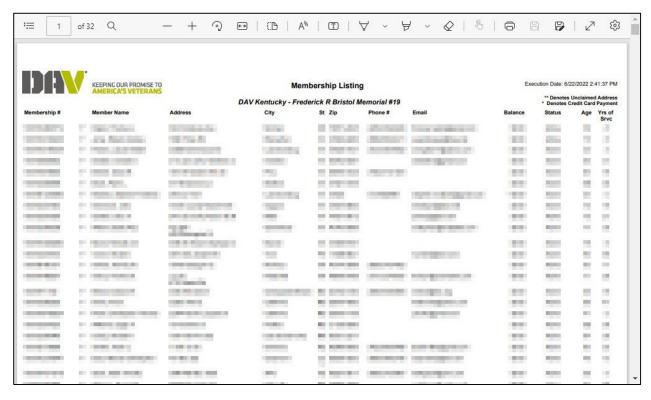


- View, save, and/or print

# Membership Listing Report



- Listing of the members in your department /chapter

- Can generate multiple statuses and types (ctrl + shift)

- **File Format.**
  - **PDF** = Printable format
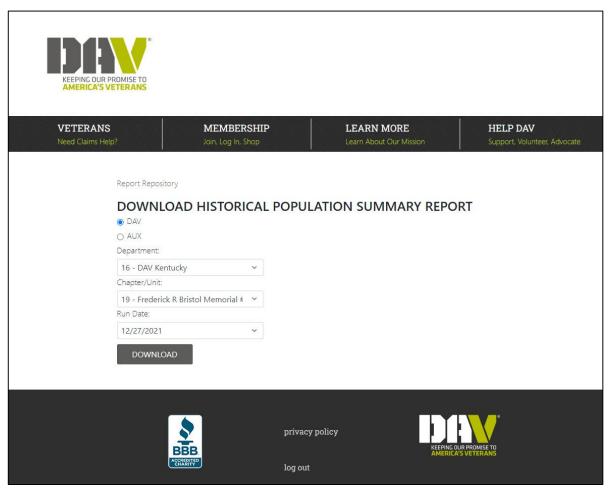  - **CSV** = spreadsheet of data, sortable

## Membership Listing Report
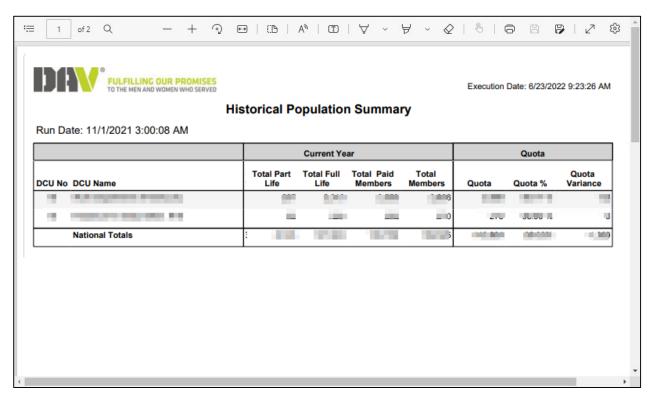


- View, save, and/or print

# Historical Population Summary Report



- Historical version of the population summary that allows you to view the report from select historical dates

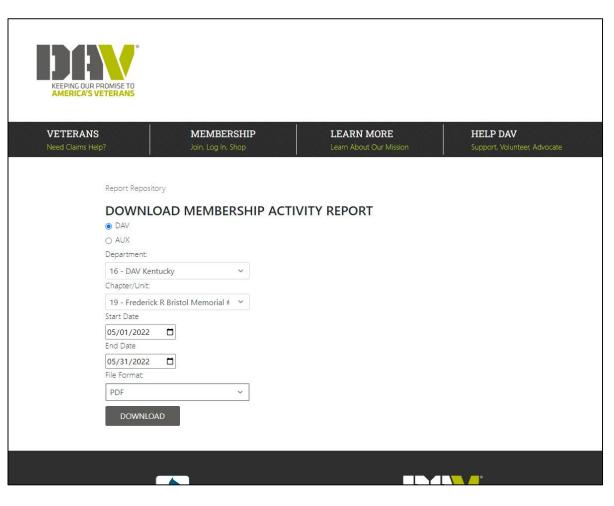- Run dates typically 6/30, 7/1, and Mondays

# Historical Population Summary Report



- Review the report.
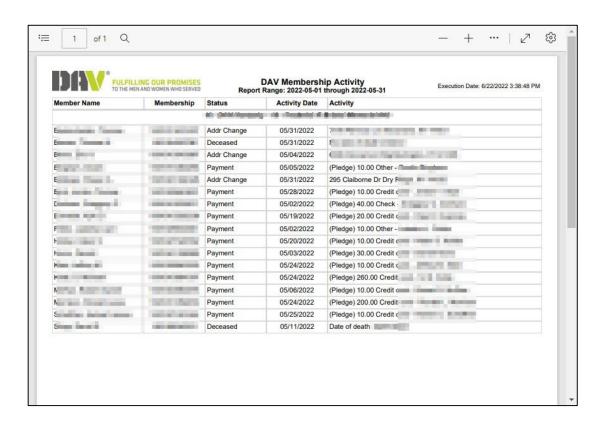- Save and/or print the report.

# Membership Activity Report



- Listing member activity (payments, address change, etc.) within your department/chapter

- **File Format**.
  - **PDF** = Printable format
  - **CSV** = spreadsheet of data, sortable

# Membership Activity Report



- Review the report.
- Save and/or print the report.

# Questions?