MyDAV.org and Membership Portal Training
Membership Department
August 5, 2022

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National Membership Director
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(859) 442-2060
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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

KEEPING OUR PROMISE TO
AMERICA’S VETERANS
• 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
New Registration

Complete the User Registration

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

- Enter your name and contact information
- Be sure to enter the correct membership number
New Registration

Complete the User Registration

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
Logging In

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
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

**Back to Membership CRM**

**Your memberships**

<table>
<thead>
<tr>
<th>Department</th>
<th>Chapter</th>
</tr>
</thead>
<tbody>
<tr>
<td>16 - DAV Kentucky</td>
<td>FREDERICK R BRISTOL MEMORIAL #10</td>
</tr>
<tr>
<td>Status: Active</td>
<td>Account Type: Full Life</td>
</tr>
<tr>
<td>Membership number: 160736618541</td>
<td>Active Positions: &lt;None&gt;</td>
</tr>
<tr>
<td>Department #: 16</td>
<td>Chapter #: 19</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Department</th>
<th>Chapter</th>
</tr>
</thead>
<tbody>
<tr>
<td>13 - DAV Indiana</td>
<td>DEARBORN CO #75</td>
</tr>
<tr>
<td>Status: Active</td>
<td>Account Type: Part Life</td>
</tr>
<tr>
<td>Membership number: 130736618541</td>
<td>Active Positions: &lt;None&gt;</td>
</tr>
<tr>
<td>Department #: 13</td>
<td>Chapter #: 75</td>
</tr>
</tbody>
</table>

- View membership information
- This example shows someone with multiple memberships
Service Record

MEMBERSHIP CRM

- Member Profile: View your membership details, including Department, Chapter, or Unit, Membership number.
- Pull Service Record: Update or add military service record details.
- Membership Card Request: Submit a request for a new membership card.
- Membership Transfer Request: Complete this form, including proper signatures, and mail to the address on the form.
- Update Username and Password: Change your DAV portal username and password.
- DAV Membership Payment History: View your DAV membership payment history and make a payment toward your DAV membership balance due.
- Notification of Deceased: Send notification of a deceased member to the DAV National Headquarters Membership Department.
- Report Repository: Department, Chapter, and Unit reports.
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 CRM

- Member Profile: View your membership details, including Department, Chapter or Unit, Membership number.
- Full Service Record: Update or add military service record details.
- Membership Card Request: Submit a request for a new membership card.
- DAV Membership Payment History: View your DAV membership pledge and payment details. Make a payment toward your DAV membership balance due.
- Notification of Deceased: Send notification of a deceased member to the DAV National Headquarters Membership Department.
- Membership Transfer Request: Chapter transfer request form. Complete this form, including proper signatures, and mail to the address on the form.
- Report Repository: Governance, Chapter, and Unit reports.

Update Username and Password: Change your CRM portal username and/or password.

Privacy policy

Logout
• Make sure to enter the full Membership Number

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

MEMBERSHIP CRM

Member Profile
View your membership details, including Department, Chapter or Unit, Membership number.

Update Username and Password
Change your CRM portal username and/or password.

DAV Membership Payment History
View your DAV membership pledge and payment details. Make a payment toward your DAV membership balance due.

Membership Card Request
Submit a request for a new membership card.

Notification of Deceased
Send notification of a deceased member to the DAV National Headquarters Membership Department.

Membership Transfer Request
Chapter transfer request form. Complete the form, including proper signatures, and mail to the address on the form.
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

MEMBERSHIP CRM

- **Member Profile**: View your membership details, including Department, Chapter or Unit, Membership Number.
- **Full Service Record**: Update or add military service record details.
- **Membership Card Request**: Submit a request for a new membership card.
- **Membership Transfer Request**: Complete the form, including proper signatures, and mail to the address on the form.

**Update Username and Password**: Change your DAV portal username and/or password.

- **DAV Membership Payment History**: View your DAV membership pledge and payment details, make a payment toward your DAV membership balance due.
- **Notification of Deceased**: Send notification of a deceased member to the DAV National Headquarters Membership Department.
- **Report Repository**: Department, Chapter, and Unit reports.
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
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).
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.
Generating Reports

Report Repository

MEMBERSHIP CRM

Member Profile
View your membership details, including Department, Chapter or Unit, Membership number.

Full Service Record
Update or add military service record details.

Membership Card Request
Submit a request for a new membership card.

Membership Transfer Request:
Chapter transfer request form. Complete this form, including proper signatures, and mail to the address on the form.

Update Username and Password
Change your CRM portal username and/or password.

DAV Membership Payment History
View your DAV membership pledge and payment details. Make a payment towards your DAV membership balance due.

Notification of Deceased
Send notification of a deceased member to the DAV National Headquarters’ Membership Department.

Report Repository
Department, Chapter, and Unit reports
Generating Reports

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.
Generating Reports

Population Summary Report

- View, save, and/or print

```
<table>
<thead>
<tr>
<th>DCU No</th>
<th>DCU Name</th>
<th>Total Trial</th>
<th>Total Part Life</th>
<th>Total Full Life</th>
<th>Total Paid Members</th>
<th>Total Members</th>
<th>Goal</th>
<th>Goal %</th>
<th>Goal Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Active</td>
<td>At Large</td>
<td>Merged</td>
<td>On Hold</td>
<td>Revoked</td>
<td>Suspended</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

Execution Date: 6/22/2022 2:28:30 PM
Generating Reports

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
Generating Reports

Membership Listing Report

- View, save, and/or print
Generating Reports

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
Generating Reports

Historical Population Summary Report

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

Membership Activity Report

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

- **File Format.**
  - **PDF** = Printable format
  - **CSV** = Spreadsheet of data, sortable
Generating Reports

Membership Activity Report

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