

Signing up for CRM External Access

You will receive a notification from DAV Auxiliary national headquarters that, based on your position, you are eligible to register for access to the CRM Portal. **Do not complete this process until you have been prompted to do so.** The link **should not** be shared with others.

1. Go to the registration link – <https://www.mydav.org/member-registration?tab=1>
2. You will be prompted to fill out a New User Registration form. All sections with a red asterisk are **required**.

New User Registration

* First name:

* Last name:

* Preferred Email:

Home Phone:

* Country:

* Address:

* City:

* State:

* ZIP:

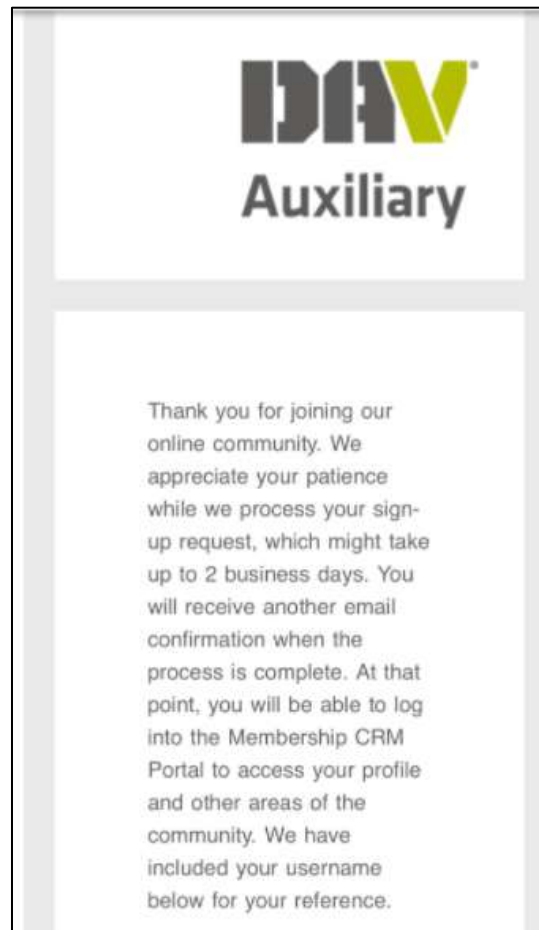
Birth date:

* Membership Number:

3. You will also be prompted to complete Account Information. Enter a username and **write down this information** for future logins. Your password must be 12

characters or more, and can include numbers and symbols. **Write down this information**, as DAV Auxiliary national headquarters will not be able to provide your password to you should you forget.

4. Once you have completed all of the information, click Submit.
5. You will receive a registration completion page once submitted. If you do not see the confirmation page, your answers have not been recorded.
6. Check the email that you provided in step #2. You will see an email from MembershipAssistant@dav.org. The subject will read “DAV/DAV Auxiliary Membership CRM Portal Registration.” If you do not see it in your inbox, check your Spam/Promotions folder.



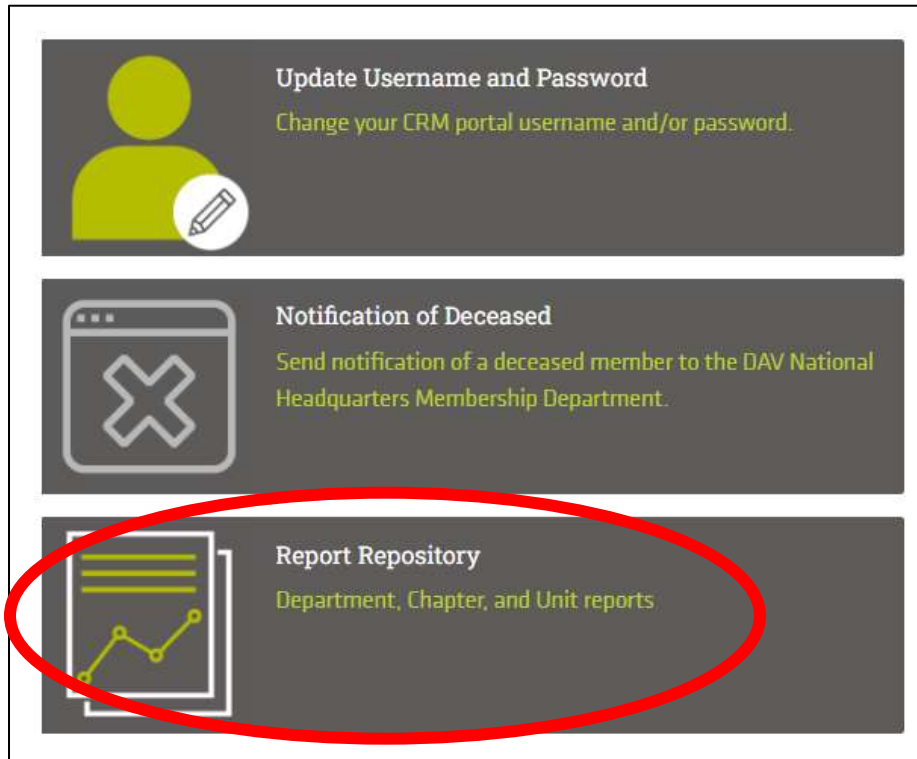
7. **You will not have immediate access to the system!** DAV Auxiliary national headquarters staff will process sign-up requests on a daily basis. Once completed, you will receive a Registration Confirmation email. The subject of the email will read, “Your DAV/DAV Auxiliary Membership CRM Portal Account.”

8. You can click on the link in the email to log in, or you can visit <https://www.mydav.org/login>.
9. To log in, you will need your Username and Password.
 - If you have forgotten your Username, you can contact DAV Auxiliary national headquarters at dava@dav.org or 877-426-2838, option 8, for assistance.
 - If you have forgotten your Password, you will need to select the Forgotten Password link at the bottom of the page. You **must** enter the email address that was used during registration set-up. If you forgot the email you used, you can contact DAV Auxiliary national headquarters at dava@dav.org or 877-426-2838, option 8. **We cannot reset your password for you!**
10. Once you've logged into the portal, you will see a Membership CRM welcome screen.



11. DAV Auxiliary State Commanders and Adjutants can run reports for all of their Units. DAV Auxiliary Unit Commanders and Adjutants can run reports for only their location. Reports currently available:
 - Population Summary Report
 - Historical Population Summary Report (a historical population summary are reports that have been previously ran and stored for informational purposes. Generally, these reports are ran every Monday.)
 - Membership Listing
 - *Note: Annual Financial Report and Office Report history will be available in the future.*

12. To run a report, click on Report Repository



13. From there, you will be able to select the list that you wish to run.



14. Population Summary Report

- Change the radial button to AUX
- It will automatically population your state department for you.
- **State Users:** Select the unit you specifically want to see, or select Department for a state report. *Note: You will see all units, including those who have been revoked and merged; however, the reports will only include Active, On Hold, and Suspended units.*
- **Unit Users:** It will populate your unit for you.

- Click download – you will see a box generate on your screen that says, “Download Started...”
- The report will load as a PDF and you will see it at the bottom of your screen. Click the “Report (number).pdf” box and it will open in a new window.

15. Membership Listing Report

- Change the radial button to AUX
- The department will automatically populate for you.
- **State Users:** select the unit you specifically want to see, or select Department for a state report. *Note: You will see all units, including those who have been revoked and merged; however, the reports will only include Active, On Hold, and Suspended units.*
- **Unit Users:** It will populate your unit for you.
- Type: Hold down CTRL and SHIFT on your keyboard and click on Part Life, Full Life, and Junior.
- Status: Hold down CTRL and SHIFT on your keyboard and click on Active, Active – Transferred In, Active – Unclaimed, Inactive/Unable to Distribute, and Junior. **Do not click on the other options, as it will not give you an accurate list and/or some of them are not applicable to AUX.**
- Include Unclaimed Address: Check this box
- Sort Method: Select the sort method you’d like the report to generate in
- Click Download – you will see a box generate on your screen that says, “Download started...”
- The report will load as a PDF
- The report will load as a PDF and you will see it at the bottom of your screen. Click the “Report (number).pdf” box and it will open in a new window.

16. Historical Population Summary Report

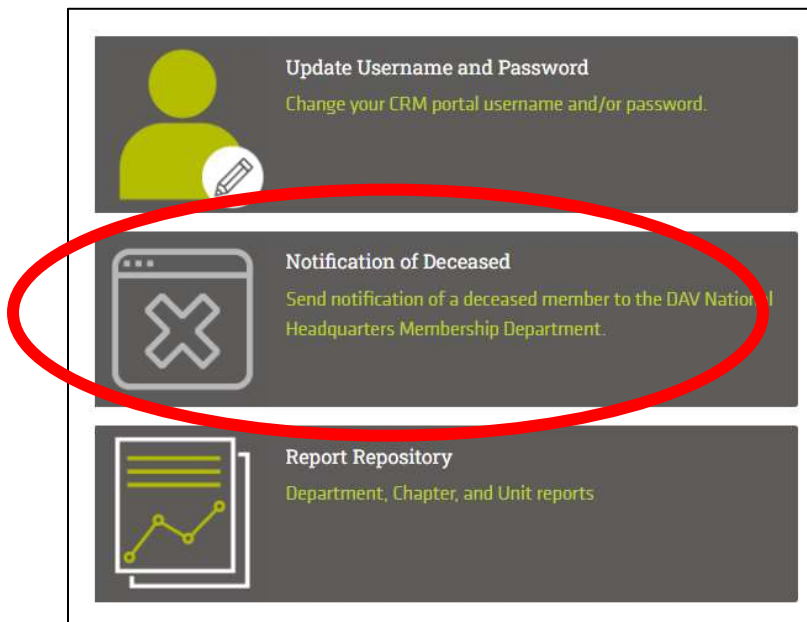
- Change the radial button to AUX
- The department will automatically populate for you.
- **State Users:** select the unit you specifically want to see, or select Department for a state report. *Note: You will see all units, including those who have been revoked and merged; however, the reports will only include Active, On Hold, and Suspended units.*
- **Unit Users:** It will populate your unit for you.
- Run Date: Select the report you wish to see. *NOTE: This list is automatically updated and additional reports will be added through our IT Department. If you are looking for a report not listed, please contact our office.*

- Click Download – you will see a box generate on your screen that says, “Download started...”
- The report will load as a PDF
- The report will load as a PDF and you will see it at the bottom of your screen. Click the “Report (number).pdf” box and it will open in a new window.

17. Membership Activity Report

- Change the radial button to AUX
- The department will automatically populate for you.
- **State Users:** select the unit you specifically want to see, or select Department for a state report. *Note: You will see all units, including those who have been revoked and merged; however, the reports will only include Active, On Hold, and Suspended units.*
- **Unit Users:** It will populate your unit for you.
- Start Date: Select when you’d like the report to start (mm/dd/yy).
- End Date: Select when you’d like the report to end (mm/dd/yy).
- Click Download – you will see a box generate on your screen that says, “Download started...”
- The report will load as a PDF
- The report will load as a PDF and you will see it at the bottom of your screen. Click the “Report (number).pdf” box and it will open in a new window.

18. Notification of Deceased – state departments and units will be able to send in deceased notifications using this option.



- Deceased Full Name: Enter their first and last name. *Please be accurate.*
- Deceased Membership Number: You must enter their membership number. If you do not have it, do not continue to use this form and send an email to dava@dav.org so the record can be updated.
- Deceased Date: Enter the date the person passed away. This is not required. If unknown, leave blank.
- Click Submit.

19. The rest of the options are self-explanatory. If you have questions or concerns, please contact DAV Auxiliary national headquarters at dava@dav.org or 877-426-2838, option 8. Please remember that anything related to a membership profile, payment history, or membership card request will only be applicable to the **USER**. Non-users will still need to contact DAV Auxiliary national headquarters for assistance.