



Adding a Satellite Club in DACdb

Rationale:

This white paper covers the best practices for adding a Satellite club in DACdb. The essential mindset to this process is to remember that DACdb presents a distinct club identity and the full set of DACdb club functionality for the Satellite. The Satellite is subordinate in DACdb (on the Clubs page), to its Sponsoring club, as its members are actually members of the Sponsoring club as far as RI records are concerned. In most DACdb reports and listings, the Satellite will be listed alphabetically, exclusive of the Sponsoring club, so most club names include "Satellite" to differentiate them from chartered Rotary clubs.

DACdb handles the Satellite situation particularly well, in that it looks like a full-fledged club from the user perspective -- its own officers, its own calendar, its own committees, bulletin, etc. -- every feature one finds in a chartered club. What's different is that when communicating member data updates with RI, the Satellite members appear as if they're part of the Sponsoring club (which they are). Even better, when in the My Club view of the Sponsoring club, its Satellites appear on separate tabs, making it easy to include or exclude them in Pmails and for ease of club administration by the Sponsoring club administrator.

Satellite Club Setup

The first step in setting up a Satellite club in DACdb starts with "Add a Club" on the "Clubs" tab. Enter the club name, the "Club Parent" (Sponsoring club) and "Satellite Club" as the type. Enter the same Area as the parent club's. Fill in the club Address, Meeting information, etc. to the extent known. Do not enter a club ID -- DACdb will assign that automatically. The Satellite will appear on the Clubs page, subordinated to the Sponsoring club. Its RI Direct should be set to "Off" (default).

You're finished with the club setup.

New Member Entry in RI

Keeping in mind that the new members are actually members of the sponsoring/parent club, the Secretary or President of the Sponsoring club logs into My Rotary, clicks "Manage", then Club Administration. ADD each new member to the SPONSORING club, using this process: [Adding New Members to DACdb and My Rotary](#).

Enter the minimum information required to get the member added. Any additional data entered in DACdb will be synchronized with RI automatically.

New Member Entry in the Satellite

On the Clubs tab in DACdb, open the Satellite club and click "Add a Member". Enter all data available for the new member -- the more the better. Do so for each new member.

Connect the Dots

The Sponsoring club must have RI Direct turned "On" in the Clubs tab. Open the Sponsoring club (My Club page), and click "RI Integration" on the left navigator, then "Member Compare". You'll see the Satellite members in **RED** on the right-hand side. If the names match, DACdb will auto-populate the Member ID field in DACdb with the RI Member ID (left-hand side). If you find a member in RI that didn't match up, just copy the Member ID on the left, click on the member name on the right (profile will open in edit mode) and paste the ID into the Member ID field.

Reporting the Satellite to RI (optional)

Once the Satellite club achieves a minimum of 8 members, it can be registered with RI using the Satellite Club Application, available from My Rotary. The members list can be attached, via any of several DACdb reports, including their Member IDs -- it's not necessary to complete the Satellite Member Information Form, as they're already entered in RI as members -- this is for internal record-keeping only. There are no RI reports or accessible information with respect to Satellite membership. If the Satellite club is given an ID, **do not** change its Club ID in DACdb -- rather, enter the Satellite ID in the "Charter Number" field on the Club Information tab.

Long-Term Maintenance

Update and maintain member contact information from the member profile, whether it's accessed from the Satellite club (from the Clubs page) or the Satellite tab of the Sponsoring club. They're the same member profile either way. Those updates will be automatically synched with RI.

When adding new members, use exactly the same process as above:

1. Add the member to RI, using the President's or Secretary's login from the sponsoring club
2. Add the member to DACdb from the Satellite Club page
3. Use Member Compare of the Sponsoring club to ensure a match between Member ID fields

Any time you add a new member, using this Best Practice will eliminate the possibility of mismatches or duplications between DACdb and RI:

<https://rotary7750.org/wp-content/uploads/2017/05/201310ADDINGNEWMEMBERSinDaCdbAndMyRotary.pdf>

If you have trouble with any of these processes, email support@dacdb.com, including your Club ID and the Member ID with which you're having trouble.

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