Learning the PMD System
A Step-by-Step Tutorial for Chapter Leaders

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INTRODUCTION

Mission Statement: The goal of the Prospective Member Database is to provide chapters with prospective member contact information in a timely manner and to provide a database for tracking prospective members.

Location: The Prospective Member Database is part of e-Membership. Go to: http://emembership.dar.org and click on the navigation link Prospectives located on the left side of the screen.

Data: The data for the Prospective Member Database comes from three sources:

1. Directly from a Prospective when she clicks on any of the Prospective Member Information Request Forms located on the National Web Site.
2. From the Office of the Organizing Secretary General – a member of the NSDAR staff will transfer the information they receive via snail mail, telephone, walk-in, or email onto the Prospective Member Information Request Form.
3. A chapter officer may enter any additional chapter prospective members into the system so all chapter prospects can be recorded in one location thereby eliminating unnecessary duplication of information.

What Happens to the Referral after it is submitted? When someone fills out a Prospective Member Information Request Form an email will automatically be generated and sent to the State Membership Chairman and the State Regent of the state that was designated as the Membership State.

An automatically generated information letter from NSDAR will go electronically to the prospective member that has sent the request form.

State Membership Chairman’s Responsibility: The State Membership Chairman contacts the prospective member to find out her level of interest. If the prospective member lives in an area where there is more than one chapter the State Membership Chairman tries to place the prospective member in the chapter that most fits her needs. After contact with the prospective member the State Membership Chairman forwards the prospective membership referral on to the appropriate chapter within her state.

Chapter’s Responsibility: Once the chapter officers have received an email informing them the chapter has a new prospective member, the designated chapter member should either call (preferred method) or email the prospective member in a timely manner (within a few days). Chapters are also required to keep their PMD System information up-to-date by adding notes to individual prospective member entries. These notes should include but are not limited to:

1. First contact with a prospective: change chapter status and enter a date phoned or emailed.
2. First response from prospective: enter date and short explanation of response.
3. Information from follow-up contacts.
4. When papers have been mailed to headquarters: change chapter status and enter note...
with the date the papers were mailed.
5. When the prospective becomes a member: change chapter status and enter her national number.
*Notes should be concise and wording positive. Remember these notes are read by others.

If a chapter has repeatedly contacted a prospective member and over the course of six months or so the prospective member has not come to a meeting nor made any attempt to appear interested, the chapter registrar may change the chapter status to ‘Remove’ and post a comment in the notes field. She should then email the State Membership Chairman to have the prospective member permanently deleted from the chapter list.

If a prospective becomes a member, the chapter registrar should change the chapter status to ‘Became A Member’ and enter her national number in the field provided. Next, send an email to the State Membership Chairman and request that the state status be changed from ‘Forwarded’ to ‘Became A Member.’

**A comment posted in the Add Note field is not automatically forwarded on to the State Membership Chairman. If you need the status of a prospective member changed for any reason an email must be sent to the state chairman.**

Computer Compatibility: The Prospective Member Database works in all the standard web browsers. These directions have been written specifically for Windows users however the directions work just as well for MAC users. The only difference MAC users will notice is that instead of clicking the left mouse button MAC users will click their mouse button once. Also in the directions when it states the mouse cursor changes to a pointing hand cursor on MACs the cursor does not change appearance. The functionality however is consistent regardless of the computer operating system you use.

For the Novice Computer User: You cannot break anything in this system. You are encouraged to go in and play with it. If you have questions please contact your State Membership Chairman, your State VIS Chairman or the National Vice Chairman, Prospective Members.
Lesson One
Logging into and out of e-Membership

Lesson one will teach you how to log into and out of e-Membership. You will also become familiar with the different components of the Welcome Screen and how to maneuver around the site using your mouse.

Step One: Logging into e-Membership

2. At the Welcome Screen, place your mouse cursor over green box with the words Click Here Login at the left side of the screen. Click the left mouse button once.
3. The next screen that appears will say Member Login and have two white text boxes for you to fill in. Place your cursor on the top white text box and click the left mouse button once. A small blinking line will appear. Type in your six digit national number in the white text box under the words: Login ID.
4. Tab once and type your password code in the white text box under to the word: Password
5. Using your mouse put the cursor on the Sign In button, located below the login text box and click the left mouse button once or click the Enter key on your keyboard.

Congratulations! You have now successfully logged into the e-Membership Site.

Step Two: Navigating the Welcome Screen

1. Take a minute to become familiar with the location of the various elements of this opening page.
2. There is a set of tabs and words at the top of the page. If you place your mouse cursor on any of these words a drop down box will appear. These words are hyperlinks which will take you to another area of the e-Membership site.
3. To the left of the screen there is a short welcome message to let you know you’ve successfully logged into the site.
4. Next is an area titled My Profile. It has your name, email address, your chapter code and your Security Group Level. The type of information you have access to is determined by your Security Group. Chapter officers can access information about their chapter members; state officers can access information about their entire state membership.
5. Below your profile is information on how to access your chapter Master Questionnaire. Master Questionnaire instructions are not provided in this tutorial.

Step Three: Logging out of e-Membership

It is very important that you always log out of e-Membership using the Logout button. Try to avoid using the ‘RED X’ in the upper right corner of your web browser as this does not actually close your e-Membership session it simply abruptly closes the open browser window. Closing e-Membership using any of the browser’s X features may lead to issues the next time you try and log into the system. Instead please follow the following steps.
1. Place the mouse cursor on the navigation link Logout found at the bottom of the navigation links on the left side of the screen.
2. Click once to successfully close e-Membership.
LESSON TWO
Viewing My Chapter’s Prospective Member List

Lesson two will teach you how to enter the PMD System and view all the prospective members assigned by the State Membership Chairman/Vice Chairman to your chapter.

Step One: Log onto e-Membership

1. Log onto e-Membership using the instructions in Lesson One, Step 1.

Step Two: Entering the PMD System

1. Move the mouse cursor over the words Prospectives on the top of the page.
2. Click the left mouse button once. The center of your screen will change. In the menu bar you will see the words Prospective Member Menu with your state name and chapter code directly underneath it.

Step Three: Viewing Prospective Member List

1. With the mouse cursor click on the words My Chapter’s Prospective Member List.
2. A new screen appears with the information on every person who has been assigned to your chapter by the State Membership Chairman/Vice Chairman.
3. At the top of the menu bar titled Prospective Member Listing are three buttons:
   a. Main Menu – takes you back to the PMD opening screen
   b. Add Prospective – allows you to add a PM to your list.
   c. State Membership Chairman – allows you to e-mail the State Chairman

Step Four: Using the Rolodex Feature

1. Under the blue banner is the name of your chapter followed by a rolodex feature. Clicking on any letter will reduce the list to just those prospective members with the last name starting with the letter you chose.
2. To see the entire list again, click on the Show All button at the end of the rolodex.

Step Five: Understanding the Prospective Member List Columns

1. Plus sign – clicking on the plus sign displays all comments added to the prospective member’s record.
2. ID – number automatically given to entry by the computer.
3. ST Status – if you move your mouse cursor over the status a comment will pop-up explaining what the designated state status represents.
4. CH Status – if you move your mouse cursor over the status, a comment will pop-up explaining what the designated status represents. As a chapter officer you can change this status. (see Lesson Five)
5. Chapter – your chapter code.
6. Name – name of prospective member in last name, first/middle name format.
7. City/State – this is the city and state the prospective member provided in their mailing address.
8. Created – date the Prospective Member Referral form as submitted.
9. Modified – last date the system was updated by either the state membership chairman or by a chapter officer.
10. VIEW Button – link to an additional screen (see Lesson Three)
11. UPDATE – link to an additional screen (see Lesson Four)
12. Yellow Envelope Icon – when the icon is clicked, an email with the To field prefilled in with the prospective member’s email address appears. (You must be connected to your email service to send the completed message.)
13. GM – Google Maps- shows chapters in the area of this Prospective Member.

Step Six: Resorting the Prospective Member List

There may be times when you need to view your Prospective Member list by Name or by Last Modified. To do this use the Sort function.

1. Look at the underlined column headings in the light blue box.
2. Place your mouse cursor over City in the column heading and click the left mouse button once. The list resorts into city order.
3. To resort the list again in alphabetical order, place the mouse cursor on the word Name in the column heading and click the left mouse button once. The listing is now resorted in alphabetical order by last name.

Step Seven: Logging out of e-Membership

1. Follow Step 3 in Lesson One to log out of e-Membership and the PMD System.
Lesson three covers how to use the various components of the View button. This feature allows the viewer to see the entire entry submitted by the prospective member, along with the activity history and any notes.

Step One: Log onto e-Membership

1. Log onto e-Membership using the instructions in Lesson One, Step 1.

Step Two: Enter the PMD System

1. Follow the instructions in Lesson Two, Step 2.

Step Three: View My Chapter’s Prospective Member List

1. With the mouse cursor, click on the words My Chapter’s Prospective Member List.
2. A new screen appears with the information on every person who has been assigned to your chapter by the State Membership Chairman/Vice Chairman.

Step Four: View Button

Place the mouse cursor on the green View button at the far right of any line and click once to open. This will bring up a screen titled Prospective Member Display with all the information the prospective member supplied when they submitted their membership request form. A history log of all the chapters the prospective member has been assigned to and comments added to the record is located at the bottom of the screen. Main Menu takes you back to the first PMD main menu screen. Below the blue banner are four buttons:

- **EDIT** – allows you to update the contact information for the Prospective member
- **HISTORY** – shows you the history, such as what action has been taken, any notes, and the dates these events occurred.
- **EMAIL APP** – allows you to e-mail an application form to the Prospective along with a note, however this should not be done until the prospective has been contacted. It should first be determined if she is ready to join and she should be offered assistance completing the application.
- **RESEARCH REQUEST** - allows you to contact the Lineage Research Lookup (LRL) Board to request assistance from DAR volunteers in completing the prospective member's application. The request may be entered in two different places, either on the LRL Board in the Lineage Research Committee webpage or from the Prospective Member's Record in the PMD System. Note: the PMD Reference ID Number is necessary to create a Research Request in either location.

The type of information you will find on the Prospective Member Display screen is provided by the prospective member unless otherwise indicated below. Information provided includes:
ID – PMD Reference number - Note: the PMD Reference ID Number is necessary to create a Research Request

Name – name of prospective member.

Email address – prospective member’s email address. Notice it is a hyperlink. You can click on the hyperlink and send an email to her provided you are logged into your internet service.

Address Line 1 & 2 – prospective member’s address

City – part of prospective member’s address

State – part of prospective member’s address

Zip/Postal code – part of prospective member’s address

Country/Province – this field is for those who live overseas, but the county of residence may appear.

Phone – prospective member’s phone number

Membership State – we provided this field in case the prospective member plans on moving soon or lives on the border of two states.

Assigned Chapter – this field is filled in once the State Chairman/Vice Chairmen assign the prospective member to a chapter.

Status – “Forwarded” means the prospective member has been assigned to your chapter.

Chapter Status – ‘CH Status?’ means no status has been assigned by the chapter; ‘Contacted’ means a chapter member has been in contact with the prospective member; ‘In Process’ means the applicant is working on papers; ‘Pending’ means the application has been sent to Washington; ‘Became A Member’ means a National Number has been assigned and ‘Remove’ means the prospective member’s name needs to be deleted from the list due to lack of interest on the applicant’s part or the prospective member needs to be reassigned to a different chapter/state.

Name of Patriot

State of Service

Name of Relative - tells the name of the relative(s) who the prospective knows or thinks may have been a DAR member. A doll figure indicates she has a relative and the relationship is given (i.e. mother, grandmother, aunt, etc.)

Available Time – prospective member has indicated their availability to meet.

Prospective Member Comments

Date Created – date is automatically generated by computer when prospective member submits information to system.

Last Updated – date is automatically generated when entry is updated. It also includes the national number of the person who made the update.

Inquiry Source – tells where the prospective member’s information originated from.

Example entries:

- Walk In – prospective member was at Headquarters and requested a chapter contact them.
- Mail – prospective member sent a letter to Headquarters and requested a chapter contact them.
- Quilt – prospective member attended the Houston International Quilt Show and talked to DAR members manning the DAR Booth. Prospective member requested a chapter contact them.
- Phone – prospective member telephone Headquarters and requested a chapter contact them.
State – prospective member contacted a State Officer and requested a chapter contact them.

Email – prospective member contacted Headquarters by email and requested a chapter contact them.

Web – prospective member filled out the Prospective Member Referral form on the DAR Public web site.

Chapter – chapter officer entered the prospective member’s information.

PIL – Patriot Lookup Volunteer entered prospective member’s information at their request.

- Learn about DAR- tells how the prospective learned about DAR.
- Admin. Notes-
- Interests-

Notice in all but a few cases the prospective member talked with either a DAR member or a DAR staff member before requesting to be contacted by a chapter. Each of the prospective member leads found in your chapter’s prospective member list is a potential member. They have already taken the initial step to become a member. They found us; we didn’t have to go find them. It is now up to you to help assist them in reaching their goal – DAR Membership.

Step Five: Prospective Member History

If you scroll down the Prospective Member Display page far enough there is a section titled Prospective Member History. This section tracks all the updates made to a particular entry. The column headings include:

- Action – For instance, Chapter Update means the prospective member has been assigned to a chapter.
- Note 1 – Gives the name of the original chapter this prospective member was assigned to. If it says simply (Old Chapter:) it means this is the first time a chapter has been assigned. If however it says (Old Chapter: and a chapter code) the system provides you with the last chapter the prospective member was forwarded to.
- Note 2 – Gives the chapter the prospective member is currently assigned to.
- Note 3 – Is a comment field It is important to make notes to track the progress and keep all who work with her informed.
- Date/User – gives the date the change was made and the national number of the person making the change. There are also two icons in this box.
  
  Icon of paper and pencil – clicking on this allows the comment to be edited
  Icon of paper with red X – clicking on this will delete the comment

Step Six: Edit Prospective Member’s Information

An edit button has been provided in case you need to change any of the information the prospective member submitted.
1. Place the mouse cursor on the word EDIT and click the left mouse button once. Modify any of the information on the screen by placing the mouse cursor in the appropriate text box and left clicking once. You may either use the backspace key or the delete key to remove information currently in the box and typing in the new information. You may tab between fields.

2. If you’ve made a mistake and haven’t clicked on the update button yet you can place your mouse cursor on the RESET button and click the left mouse button once. This will reset the data to what is currently in the database.

3. Once you’ve updated the information you need to update, place click on the Update button at the bottom of the screen.

4. You will then be returned to the Prospective Member Display screen.

**Step Seven: Plain View**

The Plain View screen has two links:
- Main Menu – takes you back to the PMD System main menu screen.
- Send Copy - allows you to email a copy of the prospective member’s information.

To email a copy of the information on the screen to a chapter member:

1. Place the mouse cursor on the words Send Copy and click the left mouse button once.
2. Fill out the email address of the party you want to send the information to.
3. Add in the Note field any additional information you want to send to the chapter member. This information would be in addition to the information found on the Plain View screen. All the information from the Plain View screen will be included at the bottom of any note you type in this form.
4. Place the mouse cursor on the Send button and click the left mouse button once.
5. After you click the send button another screen will come up showing you the email address you sent the information to. You can click Main Menu to go back to the beginning of the PMD System.

*NOTE: Sending an email to a chapter member in this area will not update the PMD System History log.*

**Step Eight: Logging out of e-Membership**

1. Follow Step 3 in Lesson One to log out of e-Membership and the PMD System.
LESSON FOUR
Changing the Chapter Status

Lesson four covers how to change the Chapter Status of a prospective. You’ll use this to update the prospective member’s progress through the membership application process. The Chapter Status will display directly under the State Status. By entering the Chapter Status your State Membership Chairman will be able to see at a glance the status of your chapter’s prospective members.

Step One: Log onto e-Membership

1. Log onto e-Membership using the instructions in Lesson One, Step 1.

Step Two: Enter the PMD System

1. Follow the instructions in Lesson Two, Step 2.

Step Three: View My Chapter’s Prospective Member List

1. Follow the instructions in Lesson Three, Step 3.

Step Four: Changing Chapter Status

1. On the Prospective Member Listing page, in the ST Status & CH Status column are the state and chapter status designations. In this column, under the word “Forwarded” is the underlined CH Status default term. If you place the cursor on the underlined words a box will appear which says “Click here to change status.” Click on the underlined words CH Status?

2. On the Prospective Member Chapter Status Update screen place the cursor on the blue down arrow to the right of the Membership Status text box. A drop down menu will appear.

3. Select the status that applies to the prospective member and the status will fill the text box.
   a. Contacted – means a chapter member is in contact with the prospective member either by telephone (preferred) or email.
   b. In Process – means the prospective member has come to a meeting, has been voted on, and is in the process of filling out her application papers.
   c. Pending – means the chapter registrar has mailed the prospective member’s application to Washington.
   d. Reassign – This indicates that a request has been made to the State Membership Chairman to reassign this PM to a different chapter. This might be due to the PM’s availability to attend meetings, personal connection with a different chapter, or her where she lives in relation to a certain chapter.
   e. Became A Member – means a national number has been assigned.
   f. Remove – means this prospective member is no longer interested in becoming a member and should be removed to the deleted list or reassigned to a different chapter.

4. Type a comment in the comment text box. Examples follow.
a. Chapter Status is changed to Contacted; type - *talked to Susie on 1/6/2010 plans to come to next meeting.*
b. Chapter Status is changed to In Process; type – *met with Susie on 1/22/2010 and all she needs is proof for gen. 1.*
c. Chapter Status is changed to Pending; type – *application mailed 2/20/2010.*
d. Chapter Status is changed to Became a Member; type – *888888 (simply enter her national number)*
e. Chapter Status is changed to Remove; type – *Prospective member says she is no longer interested, Prospective member does not return phone calls, Prospective member wishes night/day time chapter please reassign.*

5. Click on the Modify button. The screen will return to your chapter’s prospective member list and the new Chapter Status will appear.

**Step Five: Logging out of e-Membership**

1. Follow Step 3 in Lesson One to log out of e-Membership and the PMD System
LESSON FIVE
Add Note

Lesson five covers how to use the Add Note button. With this feature comments may be added to an individual prospective member’s profile. If you change the prospective member’s status add the reason the change is needed in the comment field. If the change is ‘Became A Member’ or ‘Remove’ send an email to the state membership chairman asking her to change the state status. Simply entering the note in the field does not alert the state membership chairman that a change is needed. You must email her.

Step One: Log onto e-Membership

1. Log onto e-Membership using the instructions in Lesson One, Step 1.

Step Two: Enter the PMD System

2. Follow the instructions in Lesson Two, Step 2.

Step Three: View My Chapter’s Prospective Member List

1. Follow the instructions in Lesson Three, Step 3.

Step Four: Add a Note to a record on the Prospective Member Listing page.

Once you have contacted the prospective member, met with her, given her a worksheet, mailed her application to headquarters, she’s become a member or she’s decided she is no longer interested in joining your chapter, add a note to the individual’s record.

1. On the Prospective Member Listing screen, click on the blue [Add Note] button.
2. Place the mouse cursor in box beside the red “Note:” field and click the left mouse button once.
3. Type the comment/note:
   a. For first contact – enter date you talked/emailed prospective and whether or not you’ve set up a meeting.
   b. For sending an application – enter the date the application was mailed.
   c. For a new member – enter her national number.
   d. For someone no longer interested – enter the date and reason the prospective member is no longer interested.
4. Click the SAVE button.
5. If you’ve entered a national number or stated someone should be deleted, remember to send an email to your state membership chairman making her aware she needs to change the state status on the prospective member’s record to either ‘Became A Member’ or ‘Deleted.’

Step Five: Logging out of e-Membership

2. Follow Step 3 in Lesson One to log out of e-Membership and the PMD System.
LES S SII
Add A Prospective To My Chapter

Lesson six shows you the steps necessary to add a prospective member’s information directly to
your chapter’s prospective member list.

Step One: Log onto e-Membership

1. Log onto e-Membership using the instructions in Lesson One, Step 1.

Step Two: Enter the PMD System

1. Follow the instructions in Lesson Two, Step 2.

Step Three: Scroll down to Add A Prospective To My Chapter

1. With the mouse cursor click on the words Add A Prospective To My Chapter.  
2. A new screen appears titled Prospective Member Add Form. Place the mouse cursor in the first text box and click the left mouse button once. Fill in as many fields as possible. If you are missing data you can enter it later using the edit feature. You must enter information into fields with Red Titles.  
3. Once all the fields are completed, place the mouse cursor on the Send button and click the left mouse button once.  
4. The Prospective Member List with the information you entered will appear.

Prospective members may also be added from the chapter’s Prospective Member Listing screen. At the top of the page to the right of the chapter name are the underlined words ADD Prospective. Simply click on the words to go to the Prospective Member Add Form.

Step Four: Logging out of e-Membership

1. Follow Step 3 in Lesson One to log out of e-Membership and the PMD System.
LESSON SEVEN
Export File

Steps Five – [What does Steps Five – mean?] Lesson Seven may be the most challenging part of the manual for the beginner because it requires knowledge of a spreadsheet program. If you do not have a spreadsheet program you may skip these steps Five through Seven, and go from Step Four directly to Step Eight. Since not everyone has a spreadsheet program or the same spreadsheet program, spreadsheets will not be covered in this lesson. If you have a spreadsheet program and are familiar with how to use it you can download your chapter’s prospective member information and then use the data to create yearbook entries or mailing labels.

This lesson will cover how to download and save the prospective member data file to your computer, how to send a contact list in the body of an email and how to send the complete data file as an email attachment. These steps are easy to do and do not require any spreadsheet experience.

Step One: Log onto e-Membership

1. Log onto e-Membership using the instructions in Lesson One, Step 1.

Step Two: Enter the PMD System

2. Follow the instructions in Lesson Two, Step 2.

Step Three: Export File

1. With your mouse cursor click on the words Export Files.

Step Four: Creating an Export File

1. On the Detailed Export screen choose from the Field drop down box the type of report you want to create.
   a. Export All Fields – exports all information in the database.
   b. Export Contact Email Addresses Only – exports only the prospective members’ names and email addresses.
   c. Export Contact Information – exports only the prospective members’ contact information
2. Click on the button next to the type of Action you wish to take.
   a. Download Export File – downloads the file in .csv format (see Step Five for directions on how to complete this action.)
   b. Email Export File – attaches the downloaded list to a file which you can send to the Chapter Membership Chairman. (see Step Eight for directions on how to complete this action.)
   c. Email List Report – emails the information requested within the message area of the email.
3. Click the green Build Special Export button

Step Five: Download Export File
1. Choose the Action ‘Download Export File’ and clicked the green Build Special Export button

3. A screen will appear titled Prospective Member List Export. Below the title the screen tells you how many records the file contains. Further down the screen is a listing of all the information that will be included in the exported file. Each of the bolded words will be column headings in the exported file.

**Step Six: Download Extract File** – directions vary based on Windows Operating System you are using Win2000/WinXP/VISTA

1. Place the mouse cursor over the blue underlined words **CLICK HERE TO DOWNLOAD**, click the left mouse button once.
2. A dialog box will appear with several buttons across the bottom of the box. Place the mouse cursor on the SAVE button and click the left mouse button once.
3. A SAVE AS dialog box will now appear. To save the file to your My Data Sources folder, click on the down arrow to the right of the text box labeled Save in and browse to your My Documents folder and then to your My Data Sources. The file name has been automatically filled in by the computer and is a combination of your chapter code followed by the date and time (EST) the file was created. Place the mouse cursor over the Save button and click the left mouse button once.
4. A Download Completed dialog box will appear. Click on OK.
5. The dialog box will disappear but the Chapter Prospective Member List Export screen will remain. You can log out of e-Membership.
6. To locate the saved file, go to Start>My Documents>My Data Sources. You can then double click on the file name to open it.

**Step Seven: Open Chapter List Export File**

1. Place the mouse cursor over the blue underlined words **Click here to Download**, click the left mouse button once.
2. A dialog box will appear with several buttons across the bottom of the box. Place the mouse cursor on the OPEN button and click the left mouse button once.
3. The file will then open in whatever spreadsheet program you have on your computer.
4. This lesson will not cover how to manipulate the data using your spreadsheet. If you need instructions on how to do this, contact your State VIS Chairman.
5. To close your spreadsheet click on the little X in the top right corner of the program.

**Step Eight: Email Export File**

This feature will allow you to email your prospective member list to your chapter membership chairman as an attachment. In Step Four you chose Email Export File and click **Build Special Export**.

1. On the Email Options screen choose the email address of the person you are sending the report to from the drop down box.
2. In the Message section write a short note to the email recipient letting them know you are emailing them an attachment.
3. Click on the Run Report button to the right of the words Click here to Send.
4. A confirmation screen will appear informing you the report has been sent.
5. Click on the words MAIN MENU to return to the reports menu.

**Step Nine: Email List Report**

This feature will allow you to email the chapter’s prospective member list in the body of the email rather than as an attachment. In Step Four you chose the **Email List Report** option and clicked **Build Special Export**. On the Email Options screen choose the email address of the person you are sending the report to from the drop down box.

1. In the Message section write a short note to the email recipient letting them know what information will be included in the email.
2. Click on the Run Report button to the right of the words Click here to Send.
3. A confirmation screen will appear informing you the report has been sent.
4. Click on the words MAIN MENU to return to the reports menu.

**Step Ten: Logging out of e-Membership**

1. Follow Step 3 in Lesson One to log out of e-Membership.
LESSON EIGHT
Email State Membership Chairman

In previous lessons it has been mentioned that in specific instances the state membership chairman must be contacted. Lesson eight covers how to find and use the state membership chairman email link.

Step One: Log onto e-Membership

1. Log onto e-Membership using the instructions in Lesson One, Step 1.

Step Two: Enter the PMD System

1. Follow the instructions in Lesson Two, Step 2.

Step Three: View My Chapter’s Prospective Member List

1. Follow the instructions in Lesson Three, Step 3.

Step Four: Email State Membership Chairman

5. Place the mouse cursor on the words State Membership Chairman and click the left mouse button.
6. A new email message pop-up will appear with the State Membership Chairman’s email address prefilled in the TO field.
7. In the subject line text box type: DAR-PMD followed by your chapter’s name. As a courtesy to your state chairman always include the name of your chapter and your chapter code in all correspondence.
8. Type in your message. When referring to a specific prospective member in your list provide the prospective member’s name and ID number.
9. Before clicking on the SEND button be sure you are connected to your email service.

Step Five: Logging out of e-Membership

1. Follow Step 3 in Lesson One to log out of e-Membership and the PMD System.
Lesson nine covers how to add or change your chapter meeting information. This information is displayed in the Google map feature used by the State Membership Chairman when she is assigning a chapter to a prospective member.

**Step One: Log onto e-Membership**

1. Log onto e-Membership using the instructions in Lesson One, Step 1.

**Step Two: Edit Chapter Meeting Demographics**

2. With the mouse cursor click on the word UPDATES in the navigation links on the left side of the Welcome screen.
3. With the mouse cursor click on the phrase **Chapter Demo Edit Screen**.
4. With the mouse cursor click on the EDIT button.
5. Add or edit information.
6. Click on Update button to save changes.

**Step Three: Logging out of e-Membership**

1. Follow Step 3 in Lesson One to log out of e-Membership and the PMD System.