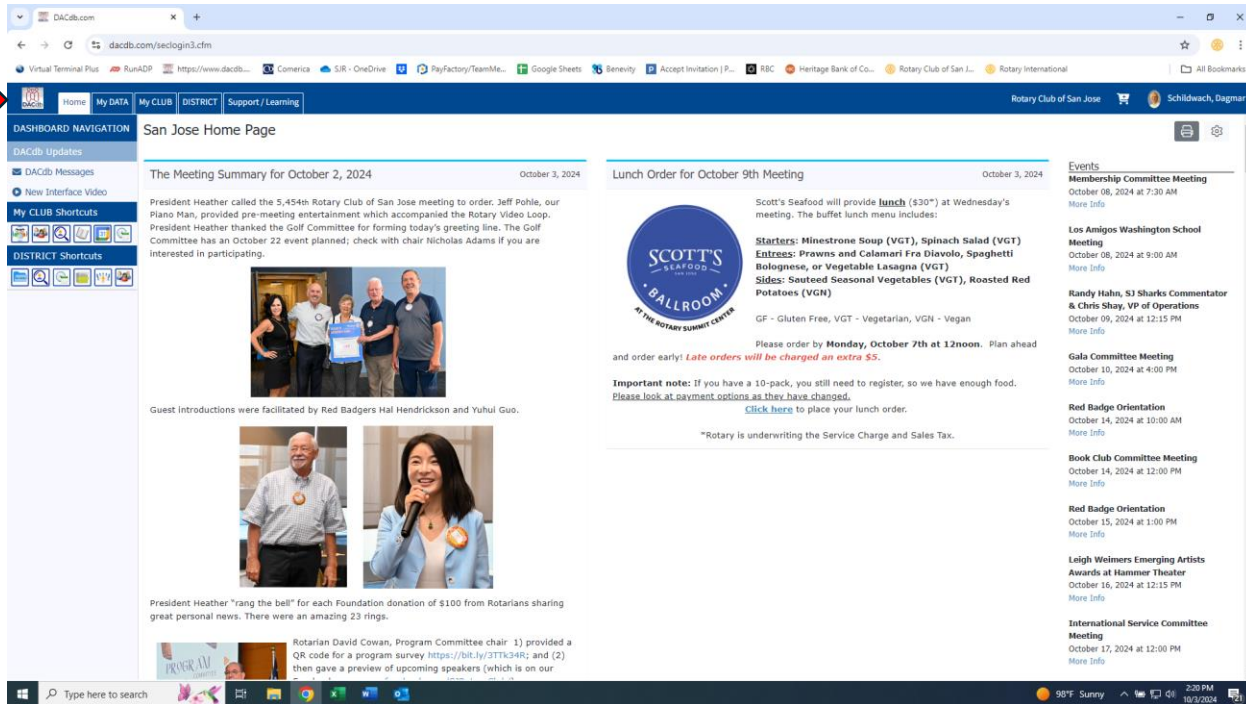


Your Rotary account management:

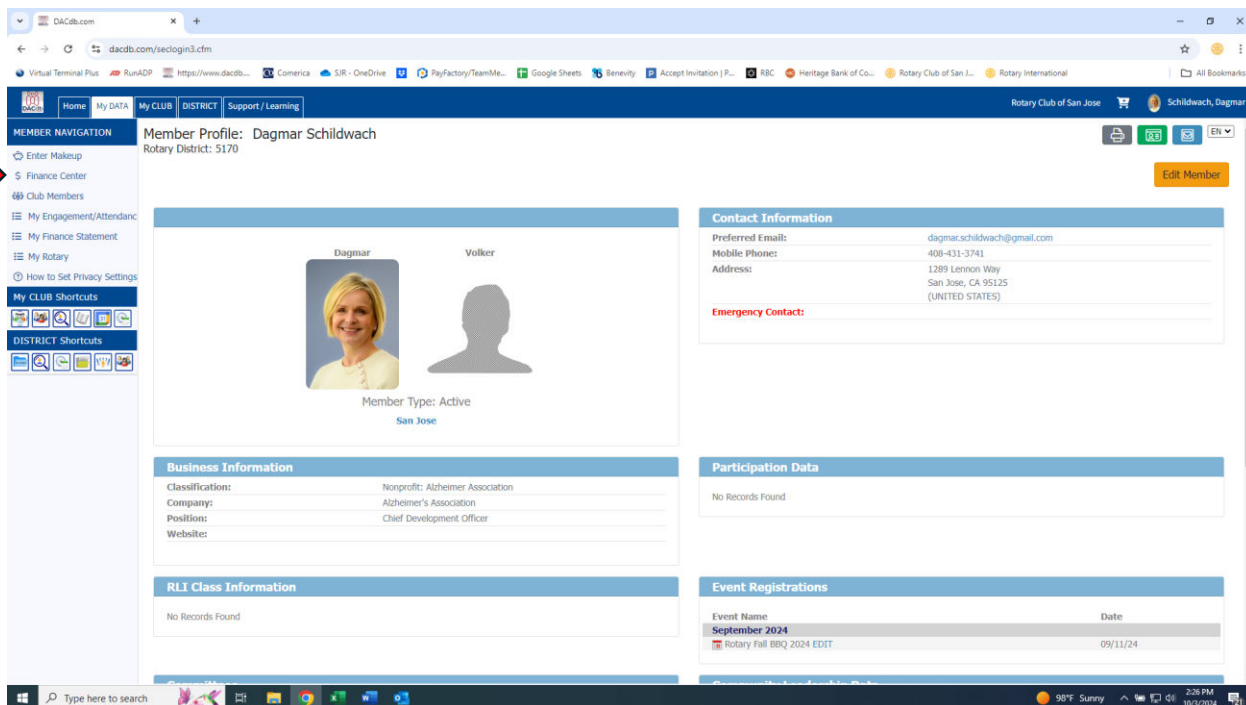
Log in to DACdb. If you don't remember your password, email Lisa and she will send you an email that will allow you to change your password to whatever you can remember.

From the Home screen, choose the tab at the top that says My Data.



The screenshot shows the DACdb Home Page for the Rotary Club of San Jose. A red arrow points to the 'My DATA' tab in the top navigation bar. The page content includes a 'San Jose Home Page' section with a meeting summary for October 2, 2024, a 'Lunch Order for October 9th Meeting' section with a Scott's Seafood logo and menu details, and an 'Events' section listing various meetings and orientations.

Once on My Data, click on the menu item to the left that says Finance Center.



The screenshot shows the DACdb Member Profile page for Dagmar Schildwach. A red arrow points to the 'Finance Center' menu item in the left sidebar. The profile page displays contact information, business information, and participation data.

Member Profile: Dagmar Schildwach
Rotary District: 5170

Contact Information

- Preferred Email: dagmar.schildwach@gmail.com
- Mobile Phone: 408-431-3741
- Address: 1289 Lennon Way, San Jose, CA 95125 (UNITED STATES)
- Emergency Contact:

Business Information

- Classification: Nonprofit: Alzheimer Association
- Company: Alzheimer's Association
- Position: Chief Development Officer
- Website:

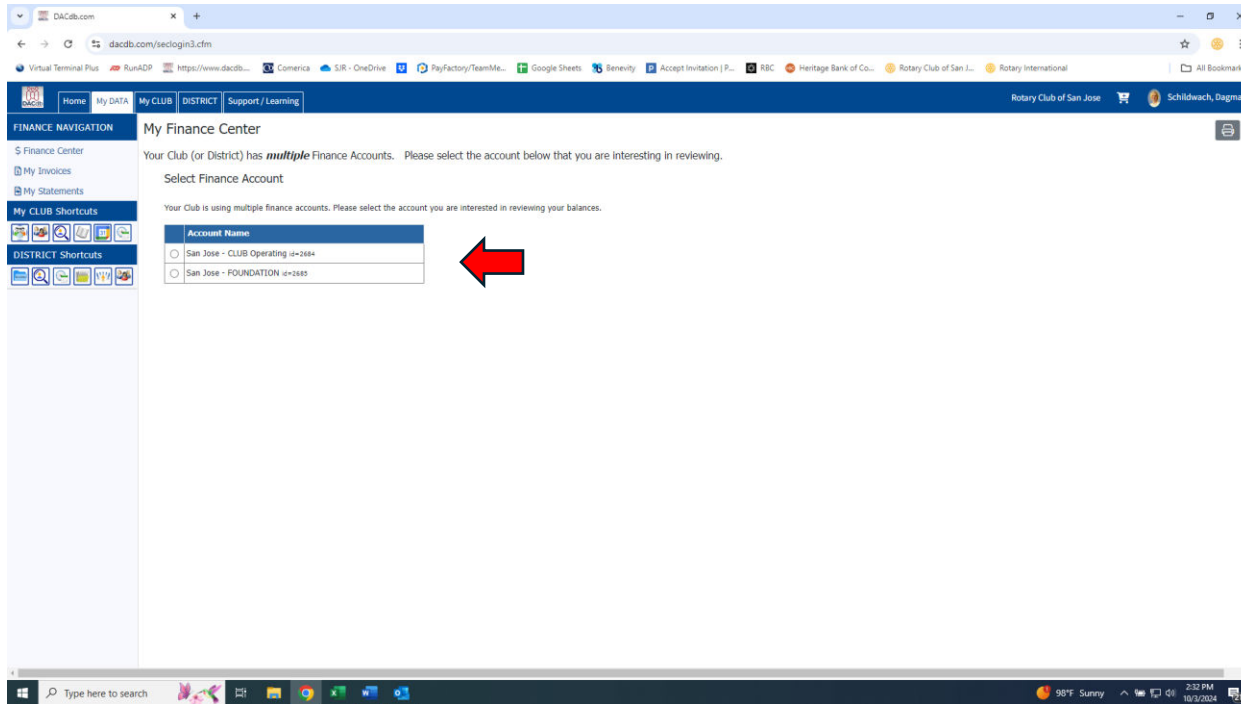
Participation Data

No Records Found

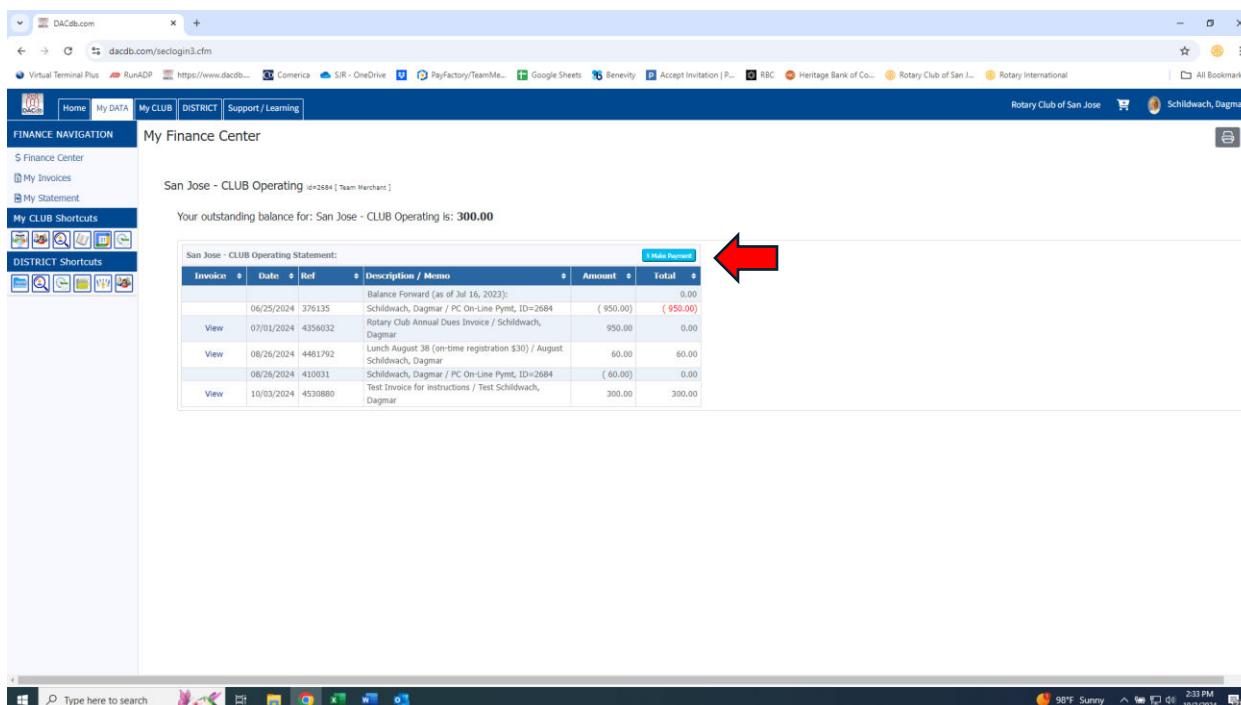
Event Registrations

Event Name	Date
September 2024	
Rotary Fall BBQ 2024 EDIT	09/11/24

From there you will be able to toggle between Club and Foundation. Click on the small radio button (open circle) next to Club or Foundation.

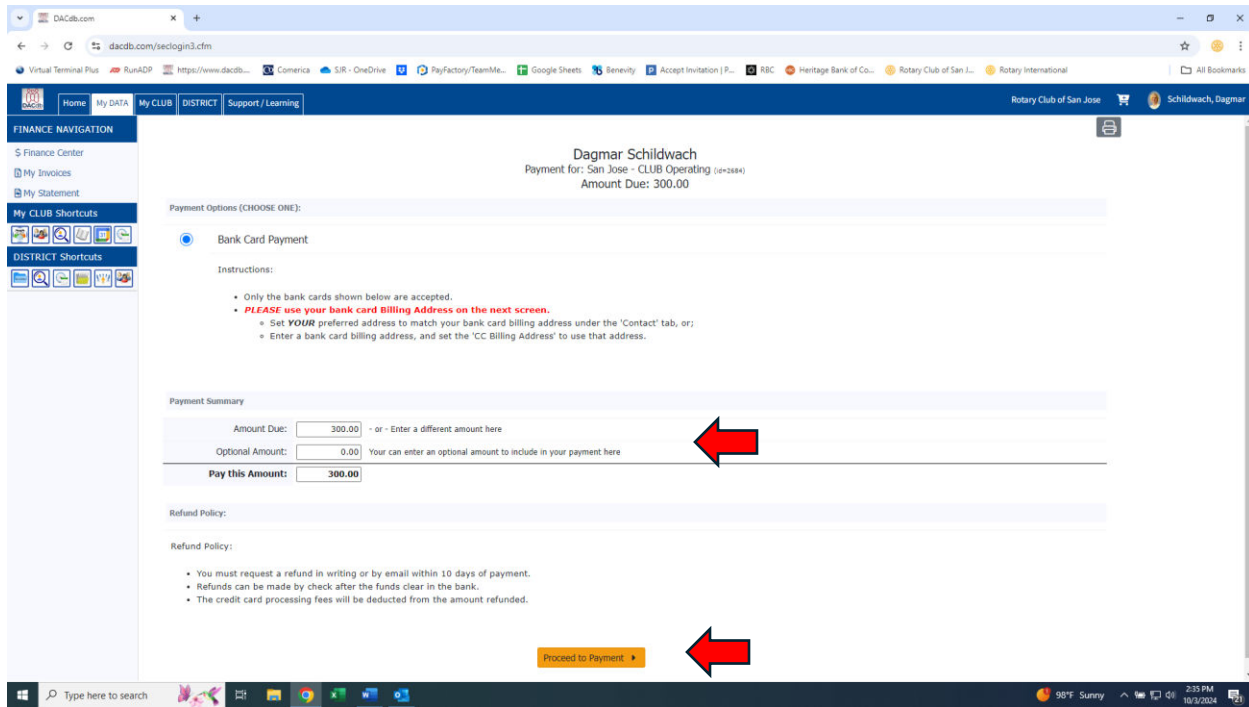


This will pull up a screen where you see your past invoice and payment history, along with any outstanding balances due. From here you can click on the small blue \$Make Payment button to the top right of the spreadsheet.

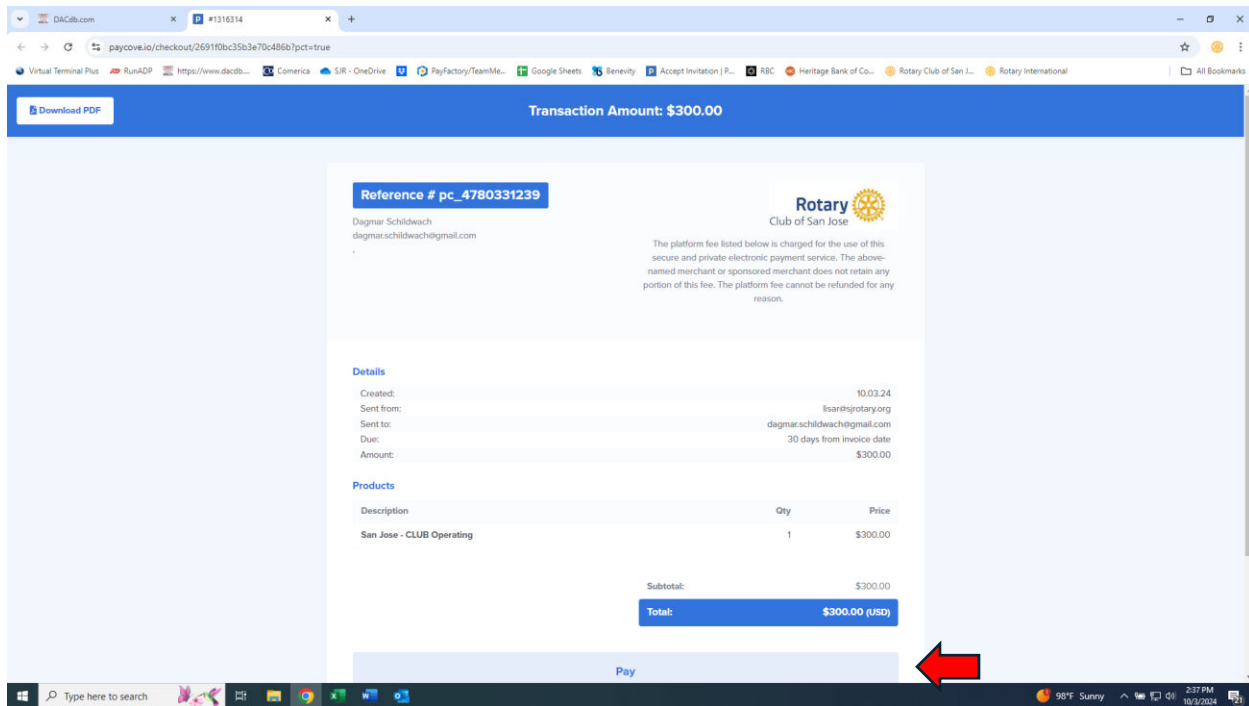


This will bring up a payment screen. From here you can pay the full amount due, or type in an optional amount.

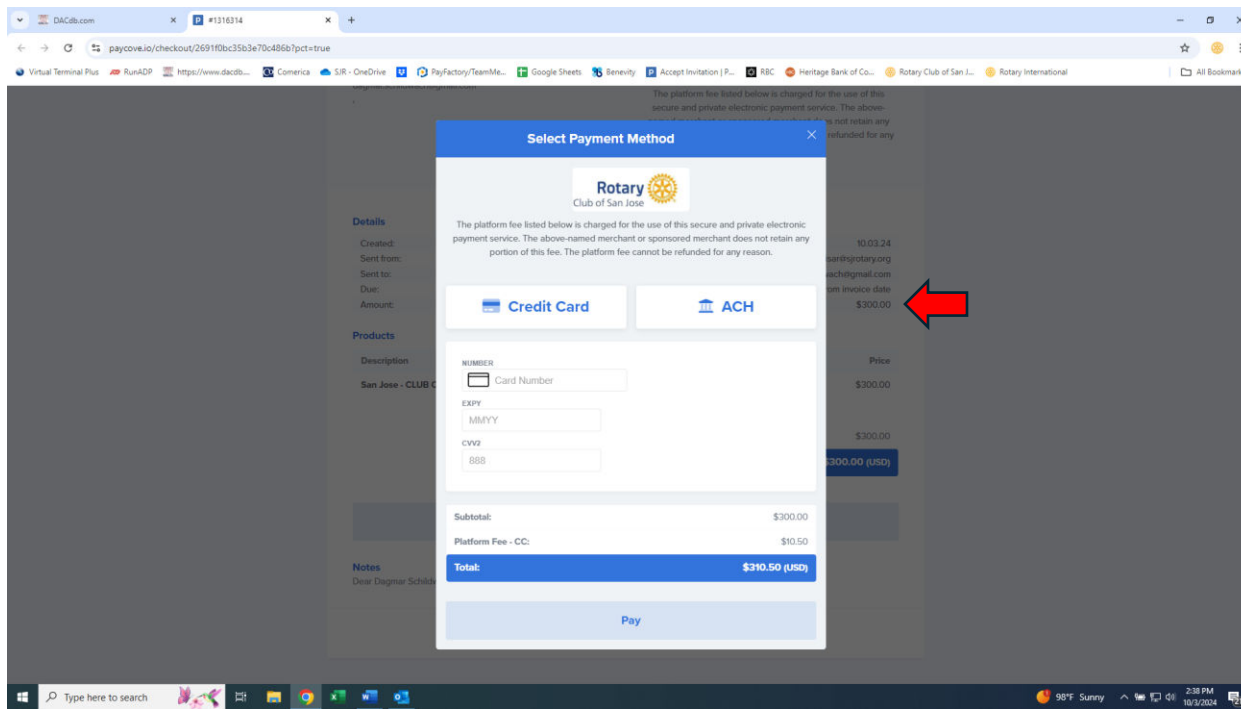
Then click the orange Proceed To Payment button at the bottom.



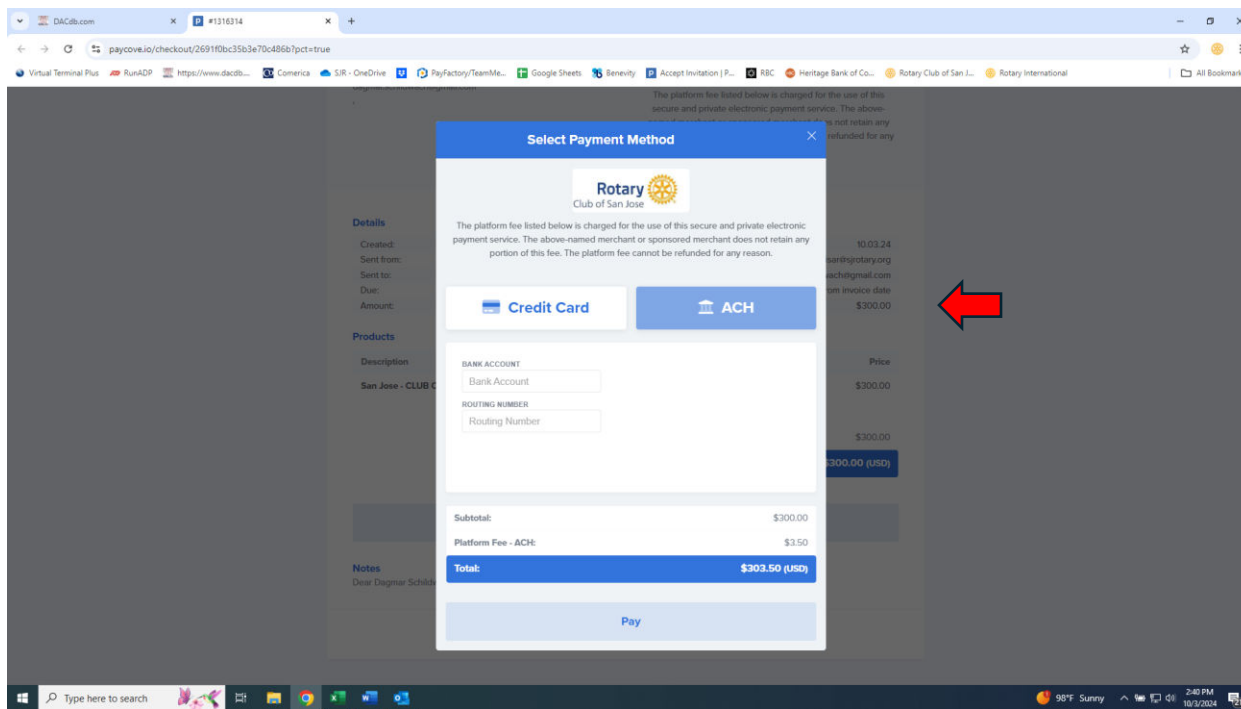
This will bring up the payment screen. Click the light blue Pay bar at the bottom.



This will bring up the payment screen. It will give you the option to pay with a credit card or do an ACH payment. The fees will be revealed depending on your choice. For instance, on this example invoice credit card shows a \$10.50 fee (this is approximately 4% of the total).



If you click on ACH, it will bring up a screen for you to enter your bank information. Your account number and routing number can be found on your bank checks at the bottom. The fee for ACH is a flat \$3.50. For amounts over \$85, your fee would be less if you do an ACH rather than pay with a credit card.



Other handy things you can access in the Finance Module:

From this screen, if you click on the small “view” link on the left side of an open invoice number it will open up the actual invoice. This can be printed or saved to a PDF so that you can forward it to someone else for payment, or printed to mail with a check if wish.

San Jose - CLUB Operating 452684 [Team Member]

Your outstanding balance for: San Jose - CLUB Operating is: **300.00**

Invoice #	Date	Ref	Description / Memo	Amount	Total
San Jose - CLUB Operating Statement: + Make Payment					
			Balance Forward (as of Jul 16, 2023):		0.00
	06/25/2024	376135	Schildwach, Dagmar / PC On-Line Pymt, ID=2684	(950.00)	(950.00)
View	07/01/2024	4356032	Rotary Club Annual Dues Invoice / Schildwach, Dagmar	950.00	0.00
View	08/26/2024	4481792	Lunch August 38 (on-time registration \$30) / August Schildwach, Dagmar	60.00	60.00
	08/26/2024	410031	Schildwach, Dagmar / PC On-Line Pymt, ID=2684	(60.00)	0.00
View	10/03/2024	4530880	Test Invoice for instructions / Test Schildwach, Dagmar	300.00	300.00

Rotary Club of San Jose
1950 Center Road
San Jose CA 95112

Rotary

Invoice

DATE	INVOICE #
Oct-03-2024	4530880

Test Invoice for instructions

BILL TO	MAIL CHECKS TO
Dagmar Schildwach 2280 Lennon Way San Jose CA 95125 USA	Rotary Club of San Jose 1950 Center Road San Jose CA 95112

DUE DATE	PERIOD
Oct-03-2024	Test

#	Item Description	Qty	Rate	Amount
1	10 pack lunch	1	\$300.00	\$300.00

SubTotal:	\$300.00
Previous Balance:	\$0.00
TOTAL:	\$300.00

Also we can add a Finance Contact to your DACdb registration and then they would automatically be emailed any invoices or statements you receive. This is helpful if you have an assistant or accounts payable person that handles your payments Simply send an email to Lisa (lisar@sjrotary.org) with the person’s email address and she will add it to your record.