New Club Database Training Guide

www.OptimistLeaders.org/NewClubDatabase
New Club Database
Training Guide

The best way to be informed about New Club Building projects

Table of Contents:

Features Overview ................................................................................................ 1

New Clubs in Progress ........................................................................................... 2

Adding a New Club Project .................................................................................... 3

Tracking and Updating Club Projects .................................................................... 4

Progress Check List .............................................................................................. 4.1

Charter Club Roster .............................................................................................. 5

Status Report .......................................................................................................... 6

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Features Overview

To access the New Club Database, go to www.OptimistLeaders.org
Be sure you are logged in to be permitted to make edits and additions.

1. Open the New Club Database homepage from the navigation panel.
2. New Club Projects in progress are accessed using this button.
3. Clubs that have Chartered and used the Database are listed.
4. This guide can be accessed through the homepage.

Contact the
E-mail: New Club Department
Form: Contact Us
(800) 900-8130
New Clubs in Progress Listing

1. This primary listing page is sorted automatically by District.
2. The list can be filtered or sorted by each column header.
3. Details give a snapshot of each Club’s progress.
4. The key person working on building the Club has contact information listed.
5. Open a Club listing by clicking on this list to view the entire Club record.
6. Click to add a new Club to the Clubs in Progress listing (pg. 3).
Adding a New Club Project

1. Enter Sponsor Club number(s). Auto-fill will take effect for the Club name and District & Zone numbers.

2. Enter the new Club name.

3. Check the box if you would like a New Club Kit shipped to the key contact (address below).

4. Check all boxes that apply for Club type.

5. Enter the primary contact’s name and click Search Name. A pop-up will appear to select contact information.
Tracking & Updating Club Projects

1. Navigation button.
2. Click edit to make updates anytime.
3. Contact information for the Sponsor Club, District Officers and the key builder.
4. Click the Build Team button to add information for your teammates in building the Club.
5. See how Checklist works on next page.
Progress Check List

1. The Progress List automatically checks off completed items. You know you’re getting close to Chartering when everything has been checked off.

2. Click to open or update a note.

3. Click Add Note to communicate between builders, Officers and Field Representatives, etc.
Charter Club Roster

1. Add new or potential Members to the Roster.
2. Print the Roster.
3. Keep a working list of new Members leads.
4. Denote Club Officers.
5. Track who has paid.
6. Delete a potential Member from the working Roster list by opening their record.

Deletions remain visible to retain contact information.
Update the Status Report as you take necessary steps to organize.

1. Optimist Club location and meeting information can be entered here.

2. Set a target date for Organization.

3. Select a Field Representative for the Organizational Meeting.

4. Select which Certified Club Builder helped build the Club.

5. Fill in Builders of Excellence by searching their name.