

Chapter Management System (CMS)

User Guide



BGS Chapter Management System (CMS) User Guide

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Signing In

You can access the Chapter Management System (CMS) from the BGS website, www.betagammasigma.org, in any of the following ways:

- a. Choose **CMS** from the menu at the top of the homepage.



- b. Choose **Access CMS** from the Collegiate Chapters menu and then select **CMS**.



- c. Choose the **CMS** quicklink at the bottom of the homepage.



At the Sign In screen, enter the username and password associated with your account.


Choose one of the three help options if you have forgotten your username or password.



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Chapter Dashboard

The Chapter Dashboard is the homepage for the Chapter Management System (CMS). You can manage your chapter by creating ceremonies, inviting members, searching your members, and more.



BETA GAMMA SIGMA
THE INTERNATIONAL BUSINESS HONOR SOCIETY

Chapter Dashboard for Test Chapter

My Chapters

- BGS At-Large
- Test Chapter (Selected)

Ceremony Management

- Search Member and Invitations
- Order Supplies
- Manage Chapter Funds and Invoices
- Collegiate Chapter Training

Upcoming Recognition Ceremonies

Ceremony Date	Invited	Accepted	Certificate Order #
December 01, 2022	0	0	November 17, 2022
December 06, 2022	0	0	November 21, 2022
December 15, 2022	0	0	December 01, 2022

Past Recognition Ceremonies

Ceremony Date	Invited	Accepted	Certificate Order #
November 02, 2022	1	0	October 18, 2022
November 01, 2022	5	1	October 18, 2022
October 31, 2022	7	1	October 17, 2022
October 06, 2022	6	0	September 22, 2022
September 21, 2022	3	1	September 07, 2022

In addition to viewing details about upcoming and recent recognition ceremonies, the Chapter Dashboard is your starting point for:

Ceremony Management

Add new ceremonies, view and manage ceremony settings and invite new members.

Search Members and Invitations

Search chapter members and invitations.

Order Supplies

Order chapter supplies for your upcoming recognition ceremonies.

Manage Chapter Funds and Invoices

View or request chapter funds. View, print or pay your current chapter invoices.

Collegiate Chapter Training

Get the knowledge and tools needed to support your chapters efforts.



If you manage more than one BGS chapter, choose your chapter name under My Chapters

Ceremony Management

To manage your recognition ceremonies, select **Ceremony Management** on the Chapter Dashboard.

Chapter Dashboard for BGS At-Large

My Chapters

- BGS At-Large
- Test Chapter
- Ceremony Management**
- Search Member and Invitations
- Order Supplies
- Manage Chapter Funds and Invoices
- Collegiate Chapter Training

Past Recognition Ceremonies

Ceremony Date	Invited	Accepted	Certificate Order 1
October 26, 2022	1	1	October 14, 2022
October 23, 2022	0	0	October 09, 2022
October 21, 2022	1	1	October 07, 2022
October 14, 2022	1	1	September 30, 2022
September 01, 2022	1	1	August 18, 2022

The Upcoming Ceremonies screen will list any upcoming ceremonies as well as your most recent ceremony. From here you can confirm fees, update certificate preferences, and invite members to a new or existing ceremony.

Upcoming Ceremonies for BGS At-Large

CHAPTER DASHBOARD | UPCOMING CEREMONIES

Upcoming Ceremonies

Create New Ceremony

Ceremony Date	Invited	Accepted	Certificate Order 1
No records to display.			

Recent Ceremonies

Ceremony Date	Invited	Accepted	Certificate Order 1
October 26, 2022	1	1	October 14, 2022

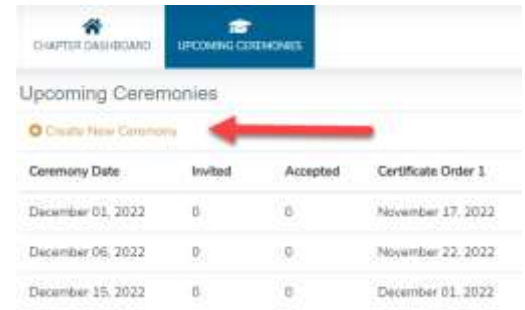
Upcoming and Recent Ceremonies


- To add a new ceremony to the Upcoming ceremonies list, click + Create New Ceremony.
- Select your desired ceremony to confirm fees, update certificate shipping information and invite members.
- Once invitees are successfully uploaded, BGS invitations are sent within minutes. Please be advised that it can take up to 24 hours for your accurate number to display on the main dashboard. A lesser number does not mean an invitation was not sent or that an invitee has not accepted. Please allow 24 hours for a final update.

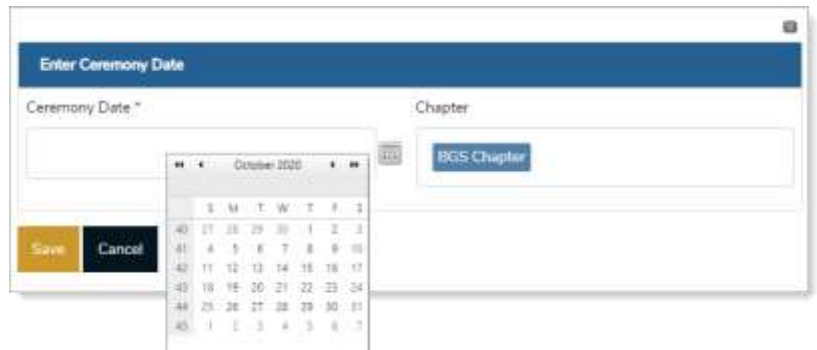
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Adding a New Ceremony

1. To create a new ceremony choose **Create New Ceremony** on the Upcoming Ceremonies list.

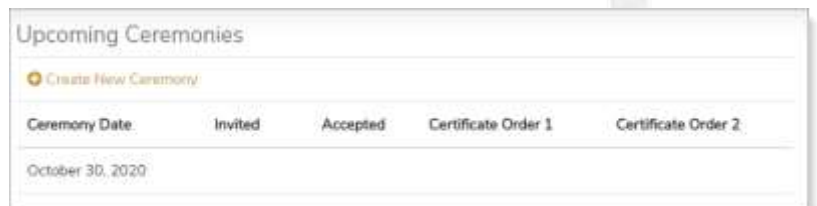


2. Select the calendar icon  to choose the ceremony date.
3. Click the **Save** button to create the ceremony.

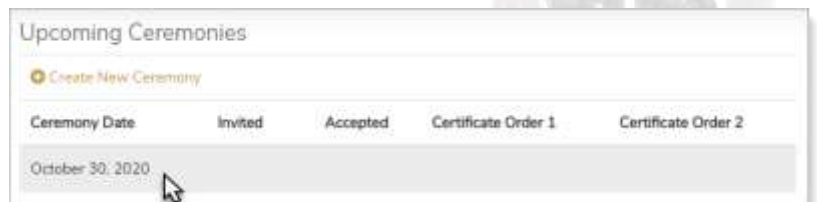


When considering your ceremony date, keep in mind that membership certificates are shipped on standard, un-editable intervals; one prior to and one after the ceremony. [Certificate Processing Schedule here.](#)

4. The newly created ceremony will be displayed in the Upcoming Ceremonies list.



Select the ceremony by double clicking on the date to manage certificate preferences, fees and to invite members.



Ceremony Settings

After selecting your upcoming ceremony from the Upcoming Ceremonies list you will arrive at the Ceremony Settings screen. From here you will be able to verify certificate printing preferences, review and edit ceremony fees and invite students.

1: Verify Certificate Preference and Contact Information

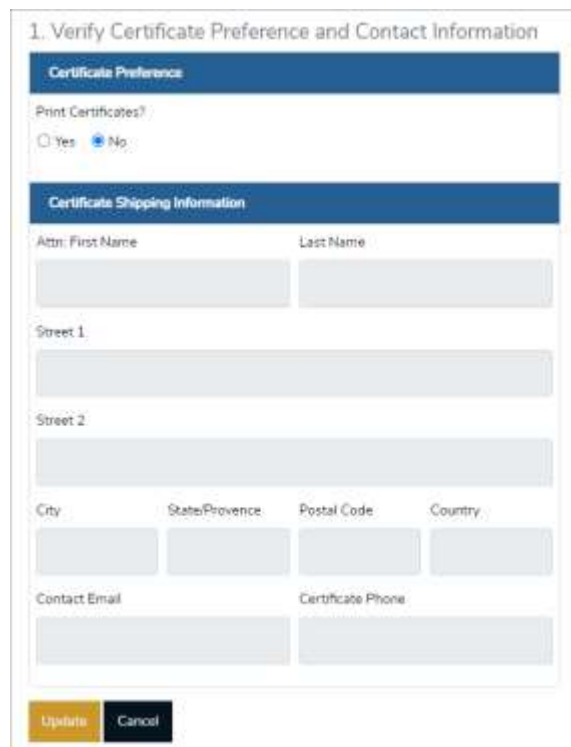
1. Select whether you would like to receive printed certificates for the ceremony.

If you select **Yes**, please complete the Certificate Shipping Information section and click Update to save your changes. This will ensure your certificates are shipped to the correct location.

2. If you select **No**, please inform your invitees they will **NOT** receive a printed certificate and lapel pin. You will also need to click Update to confirm your preference.
3. If you have chosen to print certificates, the dates that orders will be transmitted to our vendor for processing will be displayed.

Certificate order dates reflect when the order is sent to our vendor for processing.

Certificate Order 1	Certificate Order 2
November 22, 2022	December 20, 2022



Orders usually take 4-5 days to be processed before they are shipped.




Members are able to print their digital certificate from their personal profile or place an order through www.bgsstore.org.

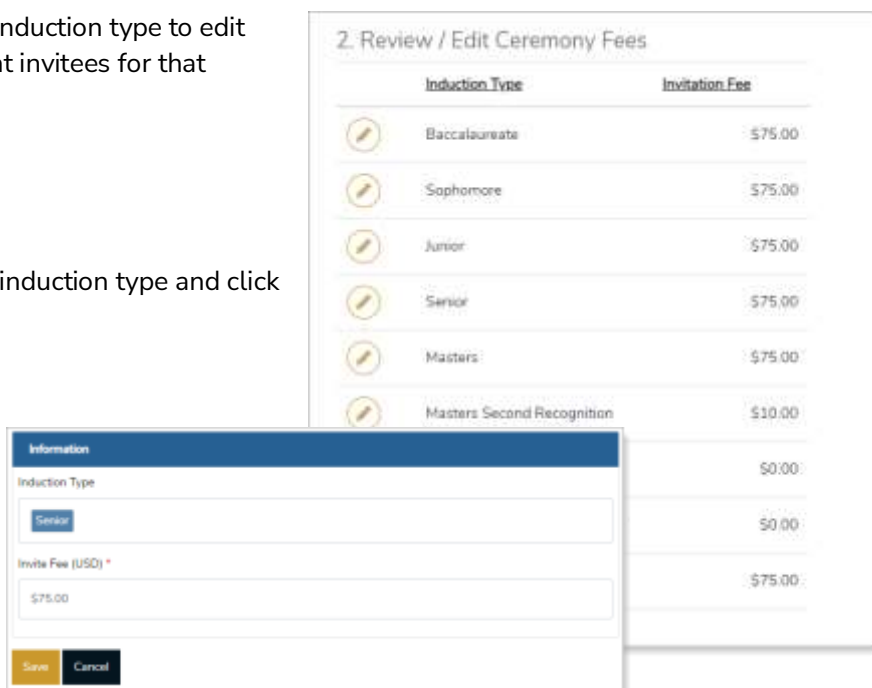


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2: Review / Edit Ceremony Fees

In the next section of the Ceremony Settings page, you can review and edit the induction fees for the ceremony.

1. Select the pencil icon  next to the induction type to edit the fee. The fee amount shown is what invitees for that induction type will be asked to pay.
2. Enter the fee amount for the selected induction type and click **Save**.



Induction Type	Invitation Fee
Baccalaureate	\$75.00
Sophomore	\$75.00
Junior	\$75.00
Senior	\$75.00
Masters	\$75.00
Masters Second Recognition	\$10.00

Information

Induction Type

Senior

Invite Fee (USD) *

\$75.00

Save Cancel



Fees should not be changed for a ceremony if students have already been invited. If you need fees changed after invitations have been sent, contact chapters@betagammasigma.org.

3: Invite New Members

When you are ready to invite new members to the ceremony, click on the **Invite New Members** button in the last section on the Ceremony Settings page.



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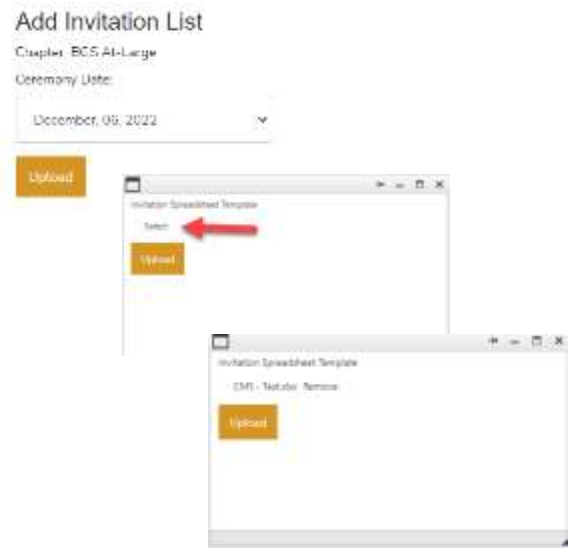
Inviting New Members

From this screen, chapters have two options for inviting new members to a ceremony, uploading a list, or inviting a new member individually.

Option 1: Add Invitation List

If you have a large number of invitees to invite, the quickest option is to upload an Excel spreadsheet containing the students and faculty you wish to invite. The spreadsheet must be in the proper format in order to upload into the CMS. If you do not have a template, you can download a copy from the Invite New Members page. Once your spreadsheet template is ready for upload you can follow these steps.

1. Select the **Upload** button to choose your template file.
2. Click the **Select** button and choose your template file to upload.

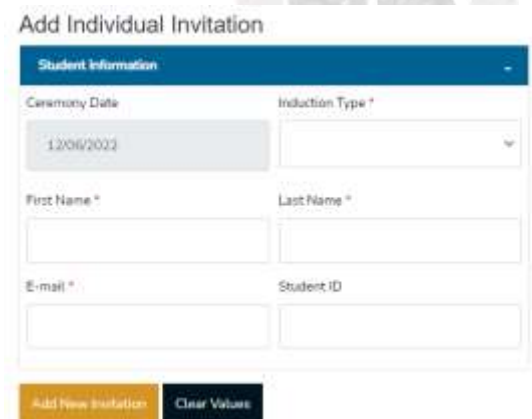


3. Once your file has been selected, click the **Upload** button to add the invitees to the Pending Uploads list. See page 9 on how to officially send your invitations.

Option 2: Add Individual Invitation

This option allows you add new member invitations one at a time. This option is useful if you only have a couple of students or faculty to invite or if you need to add additional invitees that may not have made it into your uploaded list.

1. Fill out the required Student Information fields under Add Individual Invitation section. Student ID is not required
2. Click the **Add New Invitation** button to add the invitee to the Pending Uploads list. See page 9 on how to officially send your invitations.



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Pending Invitations











Once you have uploaded your invitation spreadsheet template and/or added individual invitations, all of the invitees will be listed under Pending Invitations.

1. Review the Pending Invitations list to make sure all information is correct.


You can edit or remove any of the invitee's in the list prior to sending the invitations.

Pending Invitations

Review your pending invitee's below. If everything looks correct, click the **Send Invitations** button.

	First Name	Last Name	E-mail	Induction Type	Student ID	Error	Error Message
 	Tyriq	Howard	h0rd3p22@gmail.com	Senior		No	
 	Hubby	Gallagher	42weg6ng4@gmail.com	Senior		No	
 	Isabel	Pomer	2uck3hnt4t@gmail.com	Senior		No	
 	Adel	Kramer	kg3dnt77un@gmail.com	Junior		No	
 	Myah	Novak	Myap6n7@gmail.com	Master		No	

To Edit:

1. Click the pencil icon  beside the name to edit.
2. Click the **Save** button to save the changes or the **Cancel** button to return to the Pending Invitations list.

Pending

Induction Type


Senior 4

First Name: Isabel Last Name: Pomer

E-mail: 2uck3hnt4t@gmail.com Student ID:

Save Cancel

To Delete:

1. If any names need to be removed from the list, click the trash icon  beside the name.
2. Click the **OK** button to confirm the deletion

If you continue, the selected record will no longer be active.
Click OK to deactivate, or Cancel to leave record active.

OK Cancel

Send Invitations

Once your Pending Invitations list looks good, click the **Send Invitations** button located just below your pending list to officially send invitations to each of the invitees in the list.

A confirmation message will appear on the screen after the invitations are sent.

Send Invitations

Total pending invitations: 5
Invitations with errors: 0

Send Invitations

Send Invitations

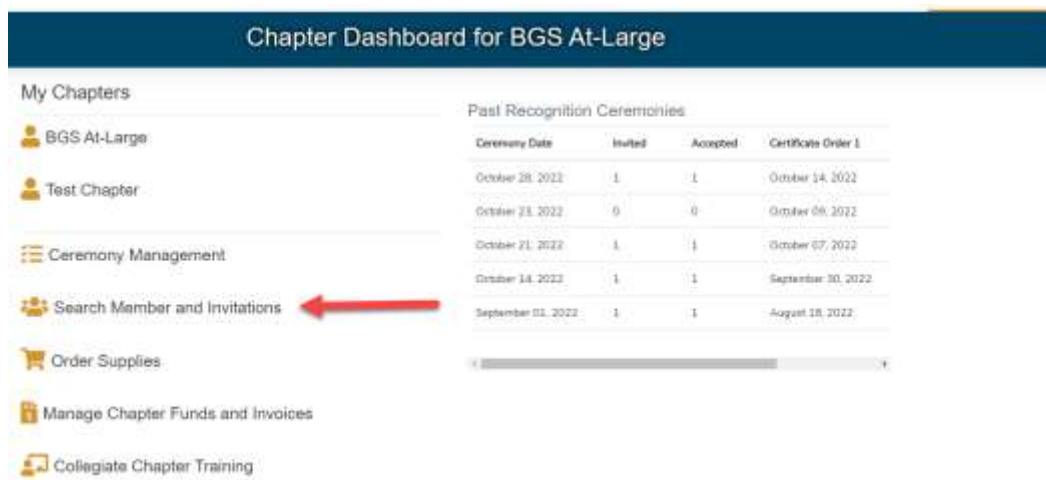
Important Message

Invitations sent: 5
Invitations missed: 0

Total pending invitations: 0
Invitations with errors: 0

Send Invitations

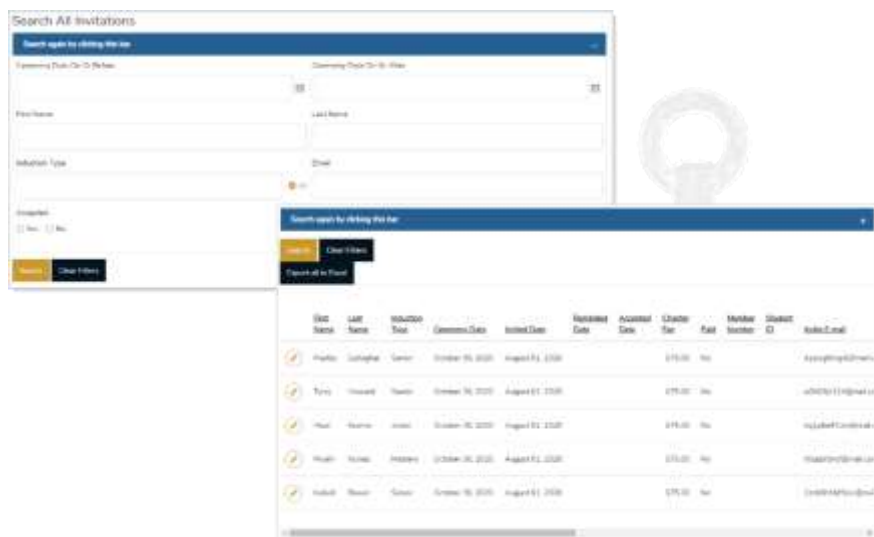
Search Members and Invitations



Search All Invitations

To search for a specific invitee or all invitations:

1. Enter any of the following search parameters:
 - a. Ceremony date or date range
 - b. First/Last name
 - c. Induction type
 - d. Email used to send invitation
 - e. Accepted status
2. Click **Search** to see the results.
3. To export the search results, click **Export All to Excel**.



If you want to view a full list of members from your chapter, leave all fields blank and click search

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Search Chapter Members

To search for specific members or all members:

1. Enter any of the following search parameters:
 - a. Ceremony date or date range
 - b. Accepted date or date range
 - c. First/Last name
 - d. Induction type
2. Click **Search** to see the results.
3. To export the search results, click **Export All to Excel**.

The screenshot displays the 'Search All Chapter Members' window. It features a search bar at the top and several filter fields: 'Ceremony Date On Or Before', 'Ceremony Date On Or After', 'Original Init Date On Or Before', 'Original Init Date On Or After', 'First Name', 'Last Name', and 'Induction Type'. Below these fields are 'Search' and 'Clear Filters' buttons. An 'Export to Excel' button is also visible. The results table below shows columns for First Name, Last Name, Email Address, Induction Type, Ceremony Date, Original Init Date, and Interview Number. The table contains three rows of data.

First Name	Last Name	Email Address	Induction Type	Ceremony Date	Original Init Date	Interview Number
Michael	Gray	Michael.Gray@betagammasigma.org	Promoter	May 27, 2020	April 27, 2020	101-000000000
Michael	Gray	Michael.Gray@betagammasigma.org	Supernumerary	May 15, 2020	April 24, 2020	101-000000000
Michael	Gray	Michael.Gray@betagammasigma.org	Supernumerary	May 20, 2020	April 28, 2020	101-000000000



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Chapter Supply Orders

To order chapter supplies and merchandise, select **Order Supplies** on the Chapter Dashboard.



1. Search options allow you to search products by description or category.



2. Select the item, enter the desired quantity, and add it to the cart.

The quantity can be changed, if needed, in your cart summary.




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- From the Cart Summary, choose to Continue Shopping or Checkout.

****You must fill in your chapter name to proceed to Checkout**

Promo codes or gift cards can be entered at this time as well.

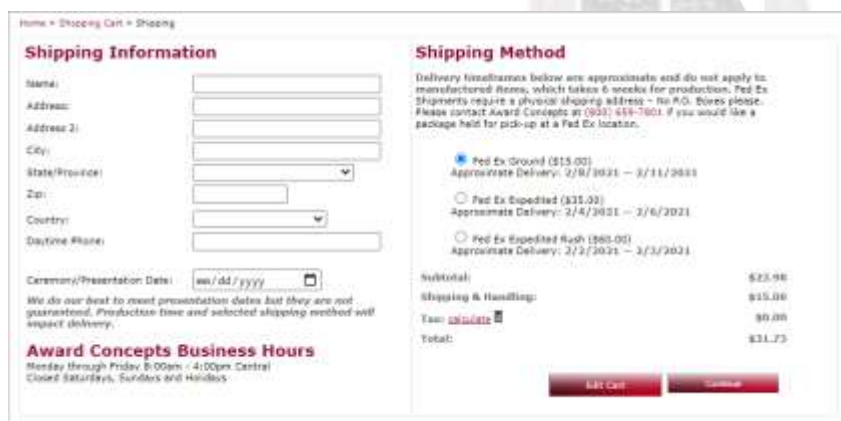


You have the option to create an account with our supply vendor or you can choose to continue to checkout without creating an account:



- Fill in the **Shipping Information** and **Shipping Method** for your order

*You will be asked for your Ceremony / Presentation date to help prioritize your order.






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Payment Options

On the payment screen, enter your **Credit Card** information to complete the order

Home » Shopping Cart » Shipping » Payment

Payment Information

Credit Card Type:    

Card Number:

Expiration: /

Name (on card):

Card ID #1:

☐ Check box if the billing address is the same as the shipping address, or enter a different address below.

Name:

Address:

Address 2:

City:

State/Province:

Zip:

Country:

Email:

Order Summary

Shipping Method: UPS/Fed Ex Ground

Shipping To: Wanda Whitford
11814 Wymore Dr
St. Louis, MO 63146

Subtotal: \$23.98

Shipping & Handling: \$13.98

Tax: \$0.00

Total: \$37.96

[Edit Cart](#) [Checkout](#)



Once your payment has been submitted the order confirmation will be displayed.

Shopping Cart » Address » Billing » Payment » **Confirmation**

Order Confirmation

Thank you for your purchase!

Order SC-1541615-FAHCR

Date of purchase: 1/15/2016

Payment: Credit Card ****0000

Bill To Address

11814 Wymore Dr
St. Louis, MO 63146
United States
314-432-5650

Ship To Address

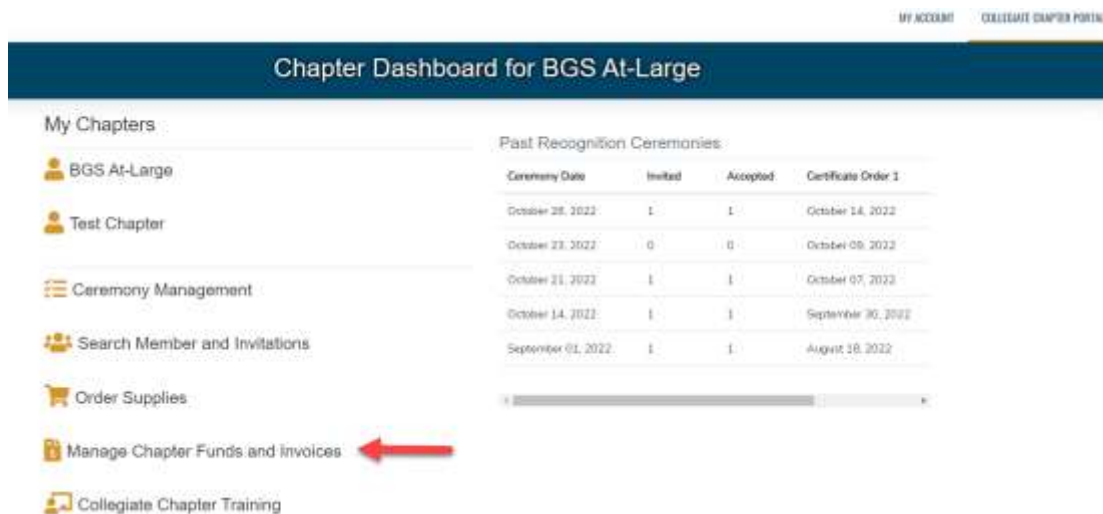
11814 Wymore Dr
St. Louis, MO 63146
United States
314-432-5650

Shipping Method

Standard - Ground Shipping

Invoice	Product	Price per unit	Quantity	Discount	Taxes	Charges
WFA-70000-CH998	34" Teleskop Retractor Base	\$143.98	1	\$0.00	\$0.00	\$143.98
WFA-70000-CH998	Shipping Cost	\$0.00	1	\$0.00	\$0.00	\$0.00

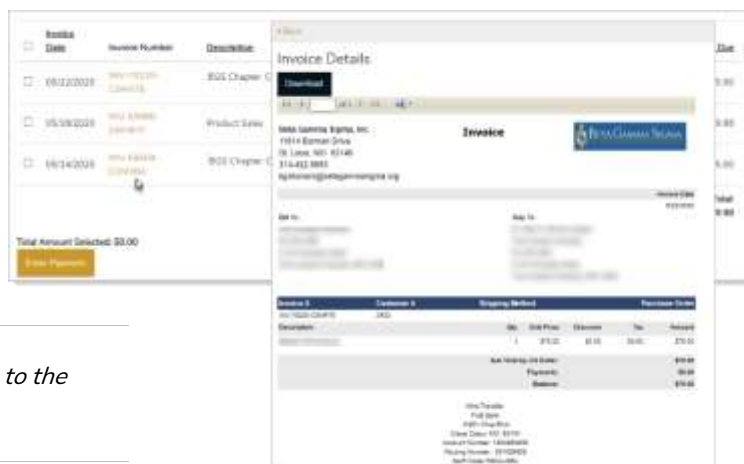
Manage Chapter Funds and Invoices



From this page you can view and pay invoices:

View and Download Invoices

1. In the invoices list, click on the invoice number to view and download the invoice.



Click the < Back link on the invoice screen to return to the invoices list.

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Pay Invoices with a Credit Card

1. Select the invoice/s you wish to pay. The total of the selected invoices will be displayed above the **Enter Payment** button.
2. Select **Enter Payment**
3. Enter the required information on the payment screen and choose **Enter Payment** to complete.

The screenshot displays the CMS interface. On the left, a table lists invoices with columns for 'Invoice Date', 'Invoice Number', and 'Description'. Three invoices are visible, with the second one selected. Below the table, a 'Total Amount Selected' of \$256.99 is shown, and an 'Enter Payment' button is present. On the right, a 'Payment Information' form is open, containing fields for 'Cardholder Name', 'Card Number', 'Expiration Date', 'CVV', and 'Billing Address'. A 'Total' of \$256.99 is also displayed on the right side of the form.

Request Chapter Funds

The Chapter Funds section is located below the invoices list. Here you will be able to see your current chapter funds balance, view your past chapter funds transactions and request additional funds.

1. Fill out the required fields in the Request Details section.
 - a. Select receive a refund check
Please provide the additional requested information.
2. Select **Save** to send the chapter funds request to BGS.

The screenshot shows the 'Request Chapter Funds' form. The 'Request Details' section includes a 'Chapter' dropdown menu, a 'Requested by' field, an 'Amount Requested (in U.S. Dollars enter numbers only)' field, a 'Requester E-mail' field, and a 'Priority Funds as' dropdown. Below this is a 'Special Instructions' text area. A modal window titled 'If requesting a check, please provide additional information' is open, showing fields for 'Name (check payable to)', 'Address Line 1', 'Address Line 2', 'City', 'State', 'Zip/Postal Code', and 'Country'. 'Save' and 'Cancel' buttons are at the bottom of the modal.

Collegiate Chapter Training

Get the knowledge and tools needed to support your chapters efforts.

MY ACCOUNT COLLEGIATE CHAPTER PORTAL

Chapter Dashboard for Test Chapter

My Chapters

BGS At-Large

Test Chapter (Selected)

Ceremony Management

Search Member and Invitations

Order Supplies

Manage Chapter Funds and Invoices

Collegiate Chapter Training

Upcoming Recognition Ceremonies

Ceremony Date	Invited	Accepted	Certificate Order 1
December 01, 2022	0	0	November 17, 2022
December 06, 2022	0	0	November 22, 2022
December 15, 2022	0	0	December 01, 2022

Past Recognition Ceremonies

Ceremony Date	Invited	Accepted	Certificate Order 1
November 02, 2022	1	0	October 19, 2022
November 01, 2022	5	1	October 18, 2022
October 31, 2022	7	1	October 17, 2022
October 06, 2022	6	0	September 22, 2022

My Account

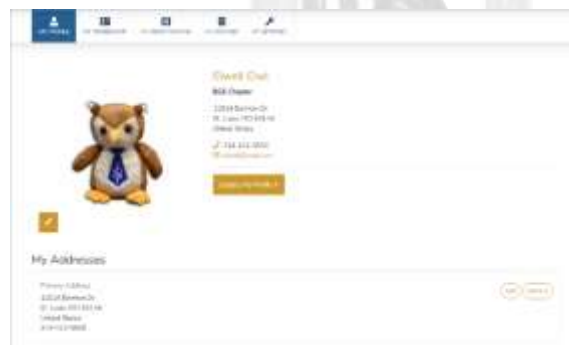
My Account is where you can manage your personal profile in the CMS. This includes your addresses, your membership information, registrations, invoices and settings such as your username and password.

From the Chapter Dashboard, choose the **My Account** link at the top right of the Chapter Dashboard.

My Profile

Under My Profile you can manage the following:

- Contact Information
- Profile picture
- Social media links



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My Membership

The My Membership section will list your BGS membership information, if applicable, and any roles you have held with your BGS chapter.



If you have a BGS membership, you can view and print a digital membership certificate by selecting your membership record.

My Registrations

My registrations will display your registrations for any upcoming events.



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My Invoices

The My Invoices section of your account is where you can view and pay your personal invoices.

1. Select the invoice/s you wish to pay. The total of the selected invoices will be displayed above the **Enter Payment** button.
2. Select **Enter Payment**
3. Enter the required information on the payment screen and choose **Enter Payment** to complete.



If you have made chapter supply orders for your chapter under your name, these invoices will also be displayed in this section in addition to Chapter Funds and Invoices.

My Settings

In this section you can:

- Change your password used to log into the CMS, including your security question and answer
- Change your username used to log into the CMS
- Update your email communication preferences

