BETA GAMMA SIGMA
THE INTERNATIONAL BUSINESS HONOR SOCIETY

Chapter Management System (CMS)

User Guide

BGS Chapter Management System (CMS) User Guide

Beta Gamma Sigma, Inc. 2029 Woodland Parkway, Suite 130 - St. Louis, MO 63146 - Phone: 314.432.5650 - chapters@betagammasigma.org

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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.

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.

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.

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.

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Adding a New Ceremony

1. To create a new ceremony choose **Create New Ceremony** on the Upcoming Ceremonies list.
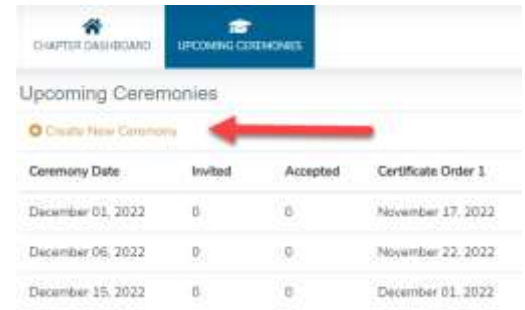
2. Select the calendar icon ⊞ to choose the ceremony date.
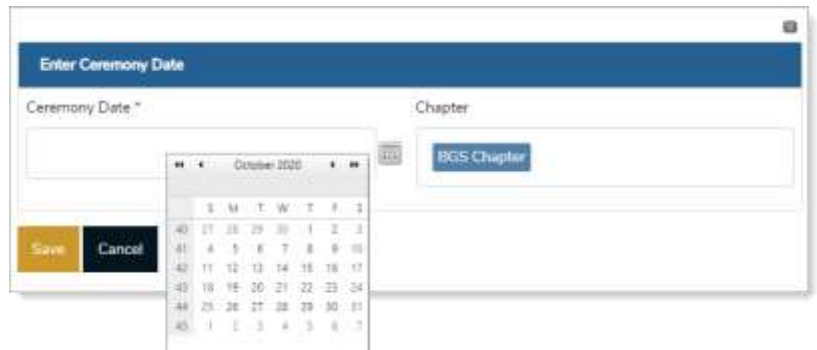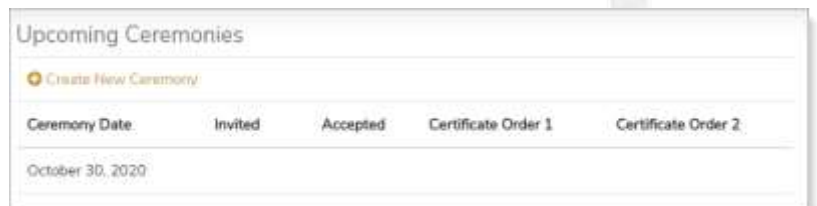

3. Click the **Save** button to create the ceremony.

> *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.

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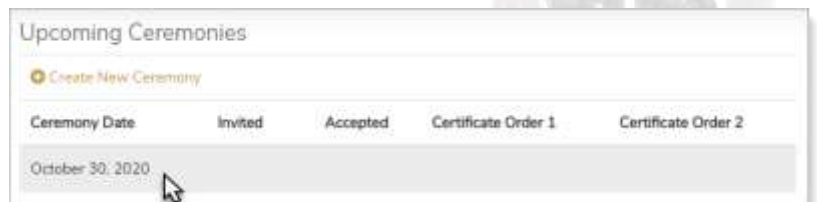
Ceremony Settings

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.

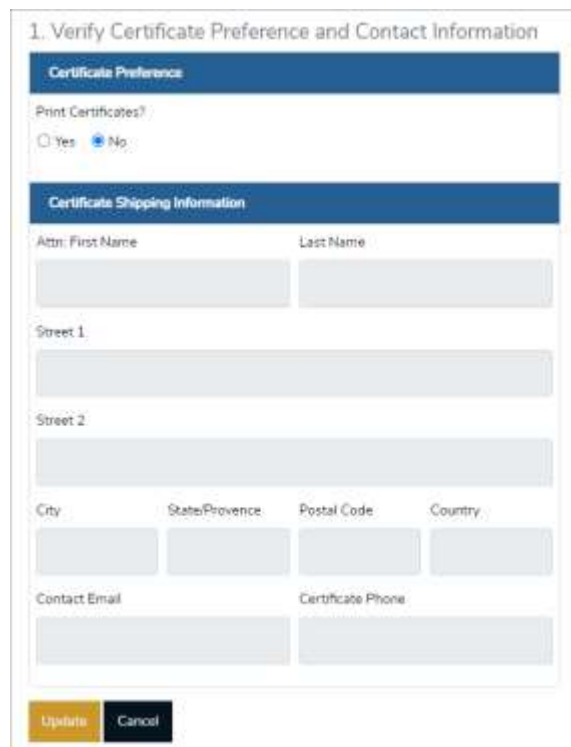### 1: Verify Certificate Preference and Contact Information

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.
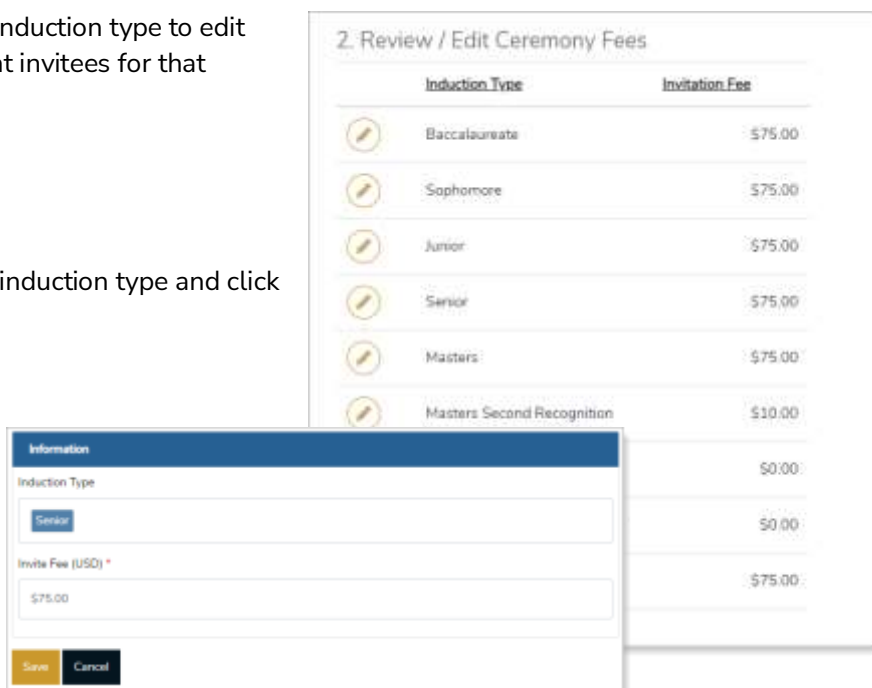

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2: Review / Edit Ceremony Fees

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**.

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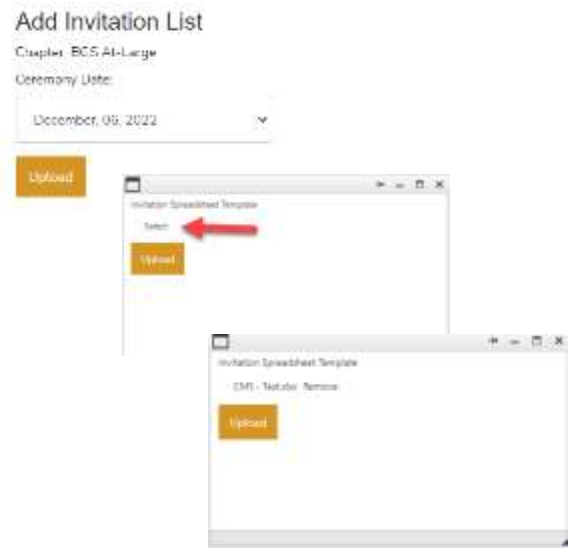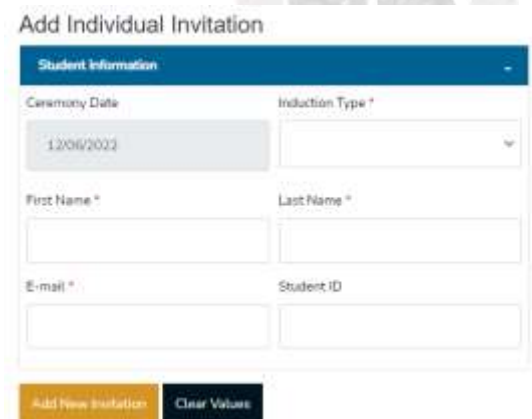
3. Once your file has been selected, click the **Upload** button to add the invitees to the Pending Uploads list. See page 9 on how to officially send your invitations.

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.

To Edit:
1. Click the pencil icon (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.

To Delete:
1. If any names need to be removed from the list, click the trash icon (trash icon) beside the name.

2. Click the **OK** button to confirm the deletion

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.
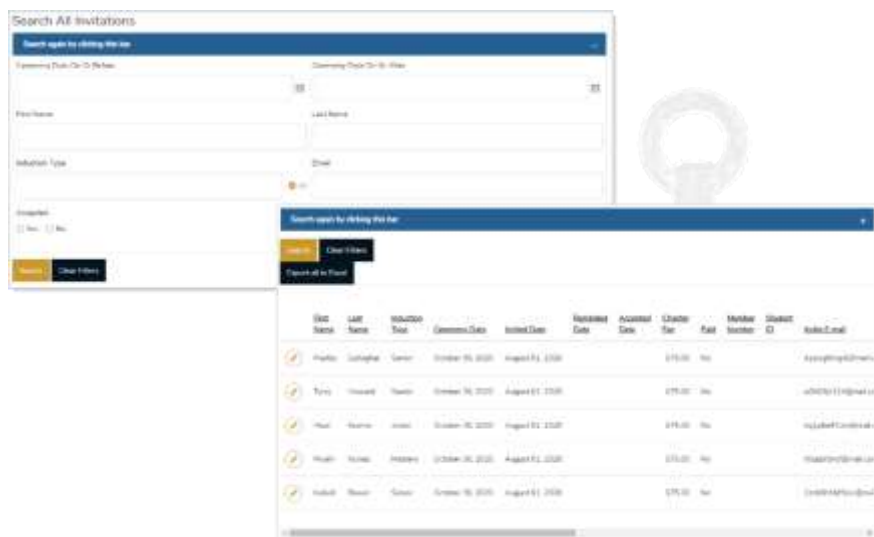
Search Members and Invitations
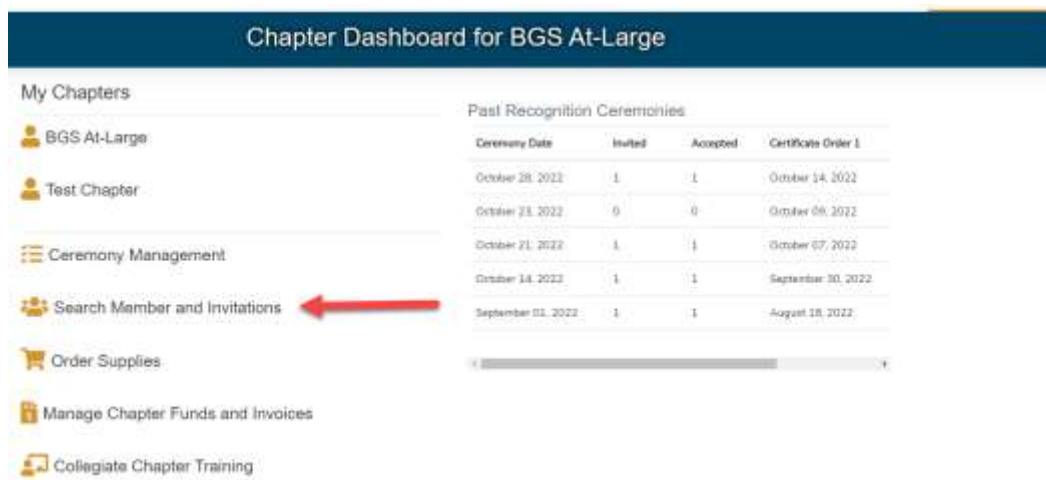
Search All Invitations

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

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.**

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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.

3. 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.
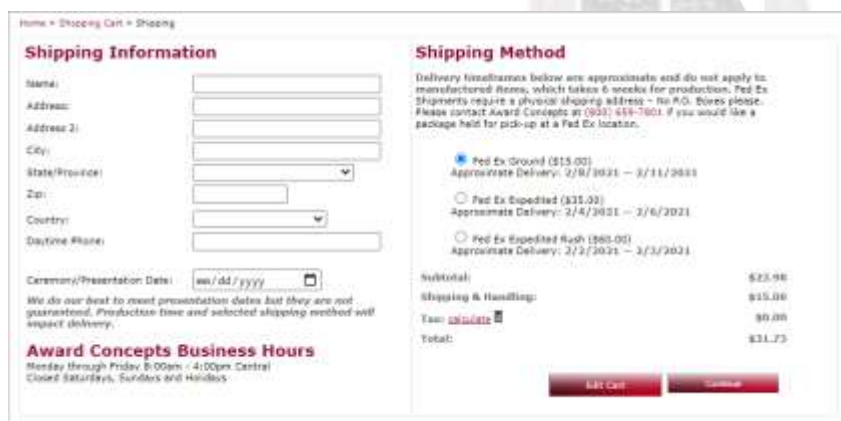
You have the option to create an account with our supply vendor or you can choose to continue to checkout without creating an account:

1) 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.

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

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

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

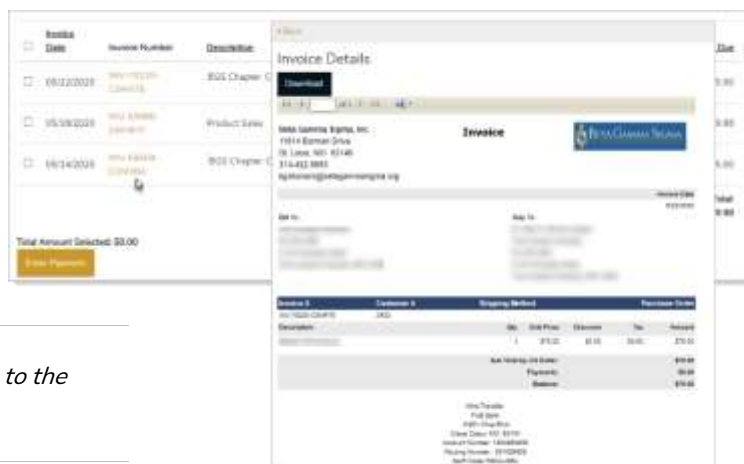1. Select the invoice/s you wish to pay. The total of the selected invoices will be displayed above the **Enter Payment** button.

2. Select **Enter Payment**

3. Enter the required information on the payment screen and choose **Enter Payment** to complete.

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.

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

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
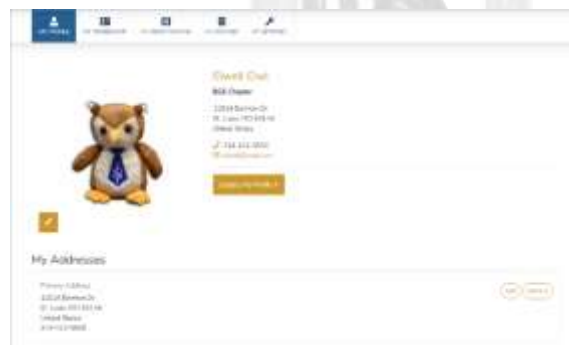
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My Membership

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 addtion 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

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