



10-Step Invitation Checklist

1. Log into the [Chapter Management System](#) (CMS) to be taken to your chapters dashboard.
2. To create a ceremony, click on the **Ceremony Management** tab and click **Create New Ceremony**.
3. Ensure your ceremony date is created with enough time to allow invitees to accept before the first certificate order is sent to our vendor to be processed and shipped.
4. Double click on your ceremony date to manage your settings including **Step 1** Verify Certificate Preference and Contact Information and **Step 2** Review and Edit your ceremony fees.
 - a. The CMS will auto default your certificate preference to **Yes**. If you wish to receive them, you'll need to input your preferred shipping information, and click **Update**.
 - b. If you do not wish to receive the printed certificate and lapel pins, you can note your preference as **No** and notify your students that they will not receive a hard copy but can access a digital version through their BGS profile.
 - c. The lifetime membership fee for Beta Gamma Sigma is \$75. This is the amount that will auto populate in the chart.
5. Upload your invitees through **Step 3** of your ceremony settings. You can either add and upload an **Invitation List** using the template noted within the CMS, or you can upload and add **Individual Invitations**.
6. Pending invitations will appear on the same page as the upload options. You can review these prior to sending the official invites. Once ready, scroll to the bottom of the page to click **Send Invitations**. Invitations will then be sent out automatically.
7. Invitations will come from the sender BGSmembers@betagammasigma.org with the subject line *You're invited to join Beta Gamma Sigma*.
8. Chapters can see who has been invited and their acceptance status by clicking on the **Search Members and Invitations** tab within the dashboard. The system will auto default to the **Search All Invitations** tab. To see your list of invitees for your upcoming ceremony enter in your ceremony date in the "Ceremony On or After" field and click search. You will be able to export your list and see who has and has not accepted membership.
9. The CMS will send an automated reminder message 7 calendar days before your initial order is sent to our vendor. If you would like a reminder sent anytime before or after this timeframe, contact your chapter manager directly or email us at chapters@betagammasigma.org to make that request.
10. For chapters that select **Yes** to receiving the certificates when setting up a new ceremony, a maximum of two orders will be sent to our vendor. One order will generate before your ceremony date and the second will be sent over 14 calendar days after the ceremony date.

Questions? Contact Global HQ at 1-800-337-4677 or chapters@betagammasigma.org