CHAPTER MANAGEMENT SYSTEM (CMS)
USER GUIDE
LOGGING IN TO THE CHAPTER MANAGEMENT SYSTEM (CMS)

1. Go to www.betagammasigma.org
2. Click the CMS button located in multiple places on the site including
   a. A button in the upper right-hand corner of the homepage (see screenshot below)
   b. By clicking “Access the CMS” under the “Collegiate Chapter” drop down menu (see screenshot below)
c. Or by scrolling to the bottom of the website in the “Quicklinks” section (see below)

3. Find the **Sign in** section of the screen
4. Enter the username associated with your account, this is likely to be your primary, professional email address.
5. Enter your password and select Sign In. If you forget your password or email used to register your account with Beta Gamma Sigma, you can contact bgshonors@betagammasigma.org to recover your account.
TO ACCESS YOUR CHAPTER DASHBOARD

Once logged in you will be re-directed to your personal Member Portal. From here, you can access your account information, or, by selecting “Your University Name” Dashboard you can navigate to your Chapter Dashboards and Create Recognition Ceremonies, Add Invitees, etc.
OVERVIEW OF THE CHAPTER DASHBOARD

The chapter dashboard is the homepage for the Chapter Management System (CMS) and the main hub for all chapter management activities. As you can see in the screenshot below, the dashboard is set up in six modules of functionality:

1. Adding a new recognition ceremony
2. Viewing and editing ceremony information which is already in the CMS
3. Inviting new members
4. Ordering chapter supplies
5. Searching chapter members and invitations
6. Managing chapter funds and invoices

Please refer to the following sections of the manual for more specific information on the functionality of the 6 modules. Please note, the images on the chapter dashboard are for quick guidance purposes only. To access the modules, please be sure to click the hyperlinked button containing the text.
HOW TO CREATE A RECOGNITION CEREMONY WITHIN THE CHAPTER PORTAL

Select the **Add Recognition Ceremony** button from the main chapter dashboard.

A. Entering your chapters certificate shipping address

Once redirected to the new screen, you will first be asked to enter in your chapters certificate mailing address. Please provide actual street addresses. PO boxes can not be used.

Once you have entered in your shipping information, you will click on the continue button.
B. Creating your chapter's ceremony date

You will now be redirected and asked to create your recognition ceremony date by selecting the calendar next to the Ceremony Date field. Please note, the CMS utilizes the following date format Month/Day/Year. (screenshot below)

When considering ceremony date, be sure to keep in mind that membership certificates are shipped on standard, un-editable intervals. Please note, the system is designed to alert users of the date our vendor will receive the batch order for process. Certificates and lapel pins will take around 3 days to be processed before they are shipped. That information will display below the ceremony date field, once a date is entered (see example below).

Once your ceremony date is entered and you are notified of your certificate processing dates, click the “continue” button to be redirected to the next screen.

C. Setting Induction Fees

Every ceremony created is set to the standard $75 USD fee. You can adjust any prices as needed for each Induction Type by selecting the Update hyperlink next to that induction type, seen in the screenshot below.
After you have reviewed and updated the ceremony fees, you can then invite new members or go back to the chapter dashboard.

You’ll then enter the total fee that you’d like invitees for this induction type to pay (in USD) and hit save.

Please note, if you will not be inviting anyone for an induction type listed in this table, there is no need to update this information. *All prices will automatically default to the standard Global HQ invitation pricing.*

Once you have completed updating the prices as necessary you can choose to: “Invite New Members” or “Go to your Chapter Dashboard.”
HOW TO UPDATE A RECOGNITION CEREMONY

*Changes will only apply to invitees who have not been uploaded and invited yet.

From the chapter dashboard, select the View Ceremony Settings button. This module allows users to make any changes to pricing, for ceremonies already added to the system. These changes only apply to new invitations. If students have already been invited to the ceremony through the system, the fees will not automatically update on each invitation. Please contact Global HQ to apply this change.

You can also update your chapter certificate shipping address. Changes can be made before your chapters pre-assigned certificate processing schedule which you can find online.
Once here, you can either select a ceremony date you have already created, or you can choose to make updates to your certificate order contact information.

If you click on a ceremony date you have created, the page will redirect to a more detailed view of the preferences identified for the ceremony selected. Induction type invitation fees can be updated by clicking the “update” button next to the particular type. Please note that any changes to pricing will only impact NEW invitations. Changes on this page will not affect any invitations already in the system.
EDIT CEREMONY FOR BGS AT-LARGE - DO NOT PRINT

CEREMONY INVITE FEES [2/14/2019]

PLEASE NOTE: Fees can only be charged if invitations have not been sent.

<table>
<thead>
<tr>
<th>Induction Type</th>
<th>Invitation Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update Baccalaureate</td>
<td>$75.00</td>
</tr>
<tr>
<td>Update Sophomore</td>
<td>$75.00</td>
</tr>
<tr>
<td>Update Junior</td>
<td>$75.00</td>
</tr>
<tr>
<td>Update Senior</td>
<td>$75.00</td>
</tr>
<tr>
<td>Update Masters</td>
<td>$75.00</td>
</tr>
<tr>
<td>Update Masters Second Recognition</td>
<td>$30.00</td>
</tr>
<tr>
<td>Update Doctoral</td>
<td>$0.00</td>
</tr>
<tr>
<td>Update Doctoral Second Recognition</td>
<td>$0.00</td>
</tr>
<tr>
<td>Update Faculty</td>
<td>$75.00</td>
</tr>
</tbody>
</table>

After you have reviewed and updated the ceremony fees, you can then invite new members or go back to the chapter dashboard.

Once you have completed all updates needed, you can return to your Dashboard using the button on the bottom of the screen or add Invitees by clicking on the Invite New Members button.
There are two ways to add new invitations in the CMS:

1. Adding a group of invitees, by importing an excel spreadsheet
   *The system auto defaults to this option*
2. Adding invitees individually and manually
**TO UPLOAD AN INVITEE LIST:**

Important note: the system will only allow uploaded files in a particular format. For the convenience of our chapter leaders, the template can be found in the CMS in the *Invite New Members* section under the *Add Invitation List* tab for use in uploading a spreadsheet of invitees. You can now include multiple induction types on the same file and the file should be saved as a regular excel file.

**File requirements:** It must be in excel and the following column headings must exist in this order to avoid error messages:

A. First Name  
B. Last Name  
C. Email address  
D. Induction Type (induction types must be listed as: Sophomore, Junior, Senior, Masters, Masters Second Recognition, Doctoral, Doctoral Second Recognition and Faculty to avoid error messages)  
E. Student ID – This information is not required by BGS, but the field was added based on chapter feedback. If this information doesn’t help you and your chapter, leave this field blank.

The file should then be saved in excel format.
You will select a ceremony that you have already created using the drop-down menu.

Once you have selected your ceremony, you will click **Choose File** and select the file you wish to upload. When you have selected your file, click **Upload**.

You will receive a notification that your list has been imported into the system. Please note this **does not** mean that your invites have been sent. Please see steps below to complete this process.

If the **number shown in the important message box** doesn’t match the **amount of records you intended to import**, some of your records may **contain errors**. Please see the next section for information on editing invitee information.

**Please note that your invitation/s have NOT been sent yet.** When your list has been imported, you will then click on the **Review and Send Invitations** button. This will send you to a pending zone to review your list before you officially prompt the system to send the invitations.
TO INDIVIDUALLY ADD AN INVITEE:

Click on the Add Individual Invitations tab
Under option 2: Select the magnifying glass buttons next to Ceremony Date and Induction Type to select the necessary information for these fields.

Next, manually type the first name, last name and email address of the invitees. Please note, the email address field will only allow users to enter a single email address, which will be used when the invitation email is sent.

Please note: The Student ID field is not required. This field has been provided based on chapter feedback. Feel free to leave this field blank if it will not be of benefit to you and your chapter.

When you have entered all the necessary information, choose the Add New Invitation button to complete the process. You will get a confirmation message confirming the successful addition of the invitation.

Please note that your invitation/s have NOT been sent yet. When you are done and have successfully created and uploaded your invitee/invitees, you will then click on the Review and Send Invitations button. This will send you to a pending zone to review your list before you officially prompt the system to send the invitations.
TO EDIT INVITEE INFORMATION AND TO OFFICALLY SEND INVITES

To review, edit or send invitation messages, click the **Review and Send Invitations** button on the right hand side of your invite members page to start the process.

You will be redirected to the pending invitations screen. On this screen, you can review all pending invitations and make any edits to those which did not upload correctly. In order for the invitations to officially send, you must press **Send Invitations** at the bottom of the page.

**EDIT INVITEE INFORMATION BEFORE SENDING INVITATION:**

In the screenshot below, notice one invitee has an invalid email address, which has been noted in the far right-hand column and in the invitation with error counter at the bottom of the screen.
To edit this invitee, select the green **Edit** button next to their first name.

A pop-up window will then appear, allowing you to make any necessary changes to the invitation record. In this example, a typographical error in the email field was corrected. When changes have been made, hit **Save** to update the contact on the Pending Invitations page.

The page should refresh itself, based on the edits you made to the invitation record. Confirm with the error count on the bottom of the page that the error is resolved.
SENDING INVITATIONS:

Prior to sending invitations, it is the responsibility of the chapter leadership team to ensure:

- The correct names have been uploaded
- Email addresses are error free
- The correct induction types have been selected
- The correct induction fees are being charged per your chapter’s policies
- All eligible invitees have been uploaded

Once all invitation records have been reviewed to ensure accuracy, click on the Send Invitations button to create the Invitation Tracking records and send an email to the invitees.

The page will refresh with a confirmation of the amount of invitations sent.
HOW TO SEARCH CHAPTER MEMBERS AND INVITATIONS

Select **Search Members and Invitations** in the Main dashboard to begin your search.

The search opens to **Search all invitations** first. If you need to search Chapter Members you can select that from the tabs.

**TO SEARCH CHAPTER MEMBERS:**

Navigate to the Search Chapter Members and Invitations tab, seen below:

![Search Chapter Members and Invitations](image)

Using this module, chapter leaders can search member records for their chapters or invited members who have not yet accepted membership. Note the two tabs of functionality.
Users can search for specific members or do a general search on criteria including:

- Induction types
- Ceremony date or a range of ceremony dates
- Email addresses
- First/last name
- Accepted Yes or No

You can enter as many or as little search parameters to refine your results. When you have gathered the filters you need and are ready to see the data, you can select Search.

If you want to see all invited students including members, you will use the search invitations tab. You can leave all fields blank and just click search. If you want to see all your accepted members, you can leave all fields blank and just click the accepted equals yes button just above the search button and then click search. This will populate all your accepted members. You can also click on the search members tab to find this information.
If you want to see the list of invitees or members by a ceremony date, you would select which search tab you want to work in. From there, would use the “ceremony on or after” and “ceremony on or before” fields depending on what you are looking for and click search. This will show you those you invited for that ceremony or set of ceremonies. You can export the data to excel and filter as needed.

You can also view an invitee’s unique personal invitation link through this section. You will have to scroll your screen to the far right. You can use this to copy a link and email it directly to a student if needed. Remember each invitee has their own link so it cannot be used for anyone other then the person it was intended for.

A reminder message will automatically be sent to all invitees who have not accepted for your upcoming ceremony 7 calendar days before your chapters order is sent to our vendor to be processed and later shipped. If you need a reminder sent anytime before or after this time frame. Please contact global headquarters and we will be happy to do that for you.
If you want a list of your full members, you can find this by using the Search Members tab. You can either leave all fields blank and click search to see a full list, or you can add filters to find a select group of members.

You can now edit a student’s information on the cart by using the green button to the left of their name:

- **Edit student information after they’ve been invited.** Go to the “Search Members and Invitations” section, and you have the option to edit a student’s name, email address, chapter fee or induction type. (If you make an update to an email address and would like a reminder message sent, please email chapters@betagammasigma.org.)
- **View and change students’ “certificate name.”** If a student has accepted membership and typed in their name incorrectly, you can edit how their name will appear on their certificate. (*We suggest only editing the students’ certificate name if you are certain the student input their name incorrectly—or if they used special characters that they don’t want on the certificate.*)
- **View the scheduled certificate order date.** This will tell you when your student’s certificate will be sent for production.

**HOW TO PLACE A CHAPTER SUPPLY ORDER**

To order and/or purchase chapter supplies and merchandise, select the **Order Supplies** button on the chapter dashboard.
You can browse item by category or scroll down the page to find the items you would like to purchase and update quantities of items below and select **Add to Cart**.

Once you have selected all of the items needed within your cart, click the **View My Cart** button to begin the purchase process.
Be sure to update your Billing and Shipping Addresses, including email address.

Change the shipping type, if necessary, from standard ground to overnight or 2-day, select “Change Shipping” listed under the Shipping Address. Additional fees apply for overnight and 2-day shipping, including international rush orders.

To proceed with a regular payment process, select the Enter Payment button at the bottom of the screen.
Enter your payment information in the necessary fields, and scroll to the bottom and Enter Payment.

A receipt will appear as the page loads confirming your payment.
BGS Global HQ allows our collegiate chapters to opt to pay invoices at a later date. To utilize this option, follow the steps below:

When in the cart, select **Enter Payment**, and the bottom of the payment window, click on the button **Bill Me – I’ll Send Payment Later** then the **Enter Payment** Button to confirm.
You will then be redirected to a confirmation page, noting a balance due for this order in the bottom right-hand corner (see screenshot below).

NOTE: Chapters can access outstanding invoices for later payment in the Manage Chapter Funds and Invoices section of the chapter dashboard.
TO PAY USING A GIFT CERTIFICATE OR PROMOTION CODE:

Occasionally, a chapter may receive a gift certificate or promotion code from Global HQ to cover the cost of a product. To utilize gift certificates or promotion codes, follow the steps below:

From within your shopping cart

- Enter gift card code where it says Enter Gift Card and choose the Apply Card button
- To utilize a promo code, Enter Promotion Code box and choose Apply Promo.

Be sure to select the Enter Payment button next to proceed with the invoice recalculation. If you used a promotion code, you will be prompted to enter the rest of the payment as well.

Users will be redirected to a confirmation screen following successful application of the promo code or gift card.
VIEW CHAPTER FUNDS AND INVOICES WITH BALANCES DUE

Select **Manage Chapter Funds and Invoices** on the chapter dashboard. From this page you can view all your chapter’s invoices, both paid and unpaid, and you can request chapter funds.
TO VIEW AND PAY UNPAID INVOICES

Select an invoice to view or pay from the My Chapter’s Invoices section.

<table>
<thead>
<tr>
<th>Balance Due</th>
<th>Invoice Date</th>
<th>Invoice Number</th>
<th>Description</th>
<th>Customer</th>
<th>Purchase Amount</th>
<th>Amount to Be Paid</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0.00</td>
<td>02/19/2018</td>
<td>INV-01238-2588S9</td>
<td>Product Sales</td>
<td>Bonhart, Julie A.</td>
<td>$108.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>$110.00</td>
<td>02/19/2018</td>
<td>INV-01209-Y463V9</td>
<td>Product Sales</td>
<td>Bonhart, Julie A.</td>
<td>$110.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>$0.00</td>
<td>02/19/2018</td>
<td>INV-01235-B78HY0</td>
<td>Product Sales</td>
<td>Bonhart, Julie A.</td>
<td>$220.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>$0.00</td>
<td>02/19/2018</td>
<td>INV-01236-2021H1</td>
<td>Product Sales</td>
<td>Bonhart, Julie A.</td>
<td>$60.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>$0.00</td>
<td>01/29/2018</td>
<td>INV-01231-7FB4C1</td>
<td>Product Sales</td>
<td>Bonhart, Julie A.</td>
<td>$60.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

Total: $110.00

Double click on it to view the invoice or click the hyperlinked invoice number.
Or you can select the checkbox next to the line item itself and choose the Enter Payment Button below the grid to pay it.

PAY UNPAID INVOICES

After utilizing the steps in the previous section to open the outstanding invoice, enter your payment information and select Enter payment at the bottom of the window when ready for processing.
PAY AN INVOICE OR REQUESTING CHAPTER FUNDS:

Below the invoices is a section called “Chapter Funds Transactions” which will show names of students who accepted membership and the chapter funds attached (the extra amount they paid over $75 USD). Below the table, the total chapter funds available is listed.

From here, you can fill out the form requesting the chapter funds. To apply this to an invoice, use the dropdown “Process Funds as” and select **Apply to Invoice.** In the special instructions, you can type in the invoice number.

**OR**

Click on the invoice and select “Enter Payment.”
In the menu that pops up, scroll to the bottom and select “Use Gift Certificate” and then enter the Gift Certificate code you are given by the Chapter Manager. When you press enter payment, it will apply the funds and send you a receipt.

Users also have access to view information about the balance in your chapter’s account, including an itemized breakdown of that total.

In the Chapter Funds table (seen below), an individualized transaction breakdown appears for all activity related to your chapter. On this table, you’ll note the transaction date and type, invoice number, contact who initiated the transaction and the total. Please note the total chapter account balance beneath the chapter funds table (as seen in the screenshot below).
<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Transaction Type</th>
<th>Invoice ID</th>
<th>Contact</th>
<th>Amount</th>
<th>Total Fee</th>
<th>Standard Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>2/19/2018</td>
<td>Purchase</td>
<td>INV-01218-Z5X8S3</td>
<td></td>
<td>($108.00)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2/19/2018</td>
<td>Purchase</td>
<td>INV-01215-R7H8Y0</td>
<td></td>
<td>($220.00)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2/19/2018</td>
<td>Purchase</td>
<td>INV-01214-T1H0B8</td>
<td></td>
<td>($195.00)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2/19/2018</td>
<td>Purchase</td>
<td>INV-01211-F7B4C1</td>
<td></td>
<td>($100.00)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2/12/2018</td>
<td>Membership</td>
<td>INV-01109-R715C5</td>
<td>Anderson, Grant</td>
<td>$15.00</td>
<td>$90.00</td>
<td>$75.00</td>
</tr>
<tr>
<td>2/12/2018</td>
<td>Membership</td>
<td></td>
<td>Polika, Casey</td>
<td>$15.00</td>
<td>$90.00</td>
<td>$75.00</td>
</tr>
<tr>
<td>2/9/2018</td>
<td>Membership</td>
<td></td>
<td>Romanas, Joshua</td>
<td>$15.00</td>
<td>$90.00</td>
<td>$75.00</td>
</tr>
<tr>
<td>2/9/2018</td>
<td>Membership</td>
<td></td>
<td>Antony, Danielle</td>
<td>$15.00</td>
<td>$90.00</td>
<td>$75.00</td>
</tr>
<tr>
<td>2/9/2018</td>
<td>Membership</td>
<td></td>
<td>Polika, Casey</td>
<td>$15.00</td>
<td>$90.00</td>
<td>$75.00</td>
</tr>
<tr>
<td>2/9/2018</td>
<td>Membership</td>
<td></td>
<td>Goda, Stephanie</td>
<td>$15.00</td>
<td>$90.00</td>
<td>$75.00</td>
</tr>
<tr>
<td>2/9/2018</td>
<td>Membership</td>
<td></td>
<td>Foster, Lindsey</td>
<td>$15.00</td>
<td>$90.00</td>
<td>$75.00</td>
</tr>
</tbody>
</table>

Account Balance
$7.00