

CHAPTER MANAGEMENT SYSTEM

USER GUIDE

Updated September 12, 2016



BETA GAMMA SIGMA

HONORING THE BEST IN BUSINESS SINCE 1913

INTRODUCTION

Beta Gamma Sigma (BGS) has created these basic, easy to follow instructions to help aid chapters in your initial and ongoing use of the BGS Chapter Management System (CMS). The instructions in this manual will continue to be updated as we strive to stay current with the needs of our chapters. The information in this manual will assist you as you set up your ceremony date, manage the invitation process, handle chapter memberships, order useful supplies, and much more.

You may find that this system is fairly similar in its layout and functionality to the now retired Online Ordering System, and that was intentional. We did not want to reinvent the wheel and force our chapters to have to go back to square one in learning an entirely new system. However, some very useful additions have been added to the CMS that were not available in our old Online Ordering System, which we are very excited about.

This system integrates with the Beta Gamma Sigma membership database in a way that allows the Society to process memberships faster and more efficiently than ever before. It provides new members with immediate access to all the benefits of being a lifetime member of BGS, something that the Society has never truly been able to offer in the past. This system allows students to pay their membership fees online, so no longer will you have to track down payments from those wishing to join. The CMS also allows you to manage your chapter's funds in a different way than you have in the past, and streamlines the entire invitation, supply ordering and induction processes.

As always, if you see something that could be improved with the CMS, we encourage you to let us know. We appreciate all your feedback, both positive and negative, as we at the Global Headquarters are constantly striving to improve the experience for our collegiate chapter officers and our members.

If you have any questions or require any additional assistance, please do not hesitate to let us know. We are here to help however we can.

We wish you nothing but the best in this academic year.

Sincerely,

The Staff of Beta Gamma Sigma



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SAMPLE CMS MEMBERSHIP PROCESSING TIMELINE (Minimum Time to Allow Prior to Ceremony Date)

12 WEEKS

- Create or update chapter account/contact information in the CMS system
- Identify eligible students and faculty; chapter nominating committee selects those to invite/elect to membership

10-11 WEEKS

- Order membership Invitation Booklets and chapter supplies through CMS
- Begin promoting Beta Gamma Sigma on campus

8-10 WEEKS

- Receive invitation packets and chapter supplies from BGS
- Create chapter invitation. Include information on the recognition ceremony and accepting the membership invitation; assemble invitation packets
- Distribute invitation packets (in class tapping, in person, or by mail)
- Input all eligible member information into CMS
- Identify current qualifying students at higher degree level who are already BGS members and offer them second recognition
- Emails will be sent to the students automatically with information of how to complete their membership data profile and pay their fee online

5-8 WEEKS

- Send a reminder email to any students who have not accepted membership through CMS
- Follow-up with prospective members either over the phone or in-person encouraging membership acceptance

10-20 DAYS

- BGS processes and ships chapter certificate order
- Chapter receives, proofs, and prepares chapter membership order materials for ceremony

0 DAYS

- Recognition Ceremony held

(Following Ceremony Date)

1-14 DAYS

- Distribute new member materials to those new members not in attendance at the ceremony (include copy of ritual for them to read)

14+ DAYS

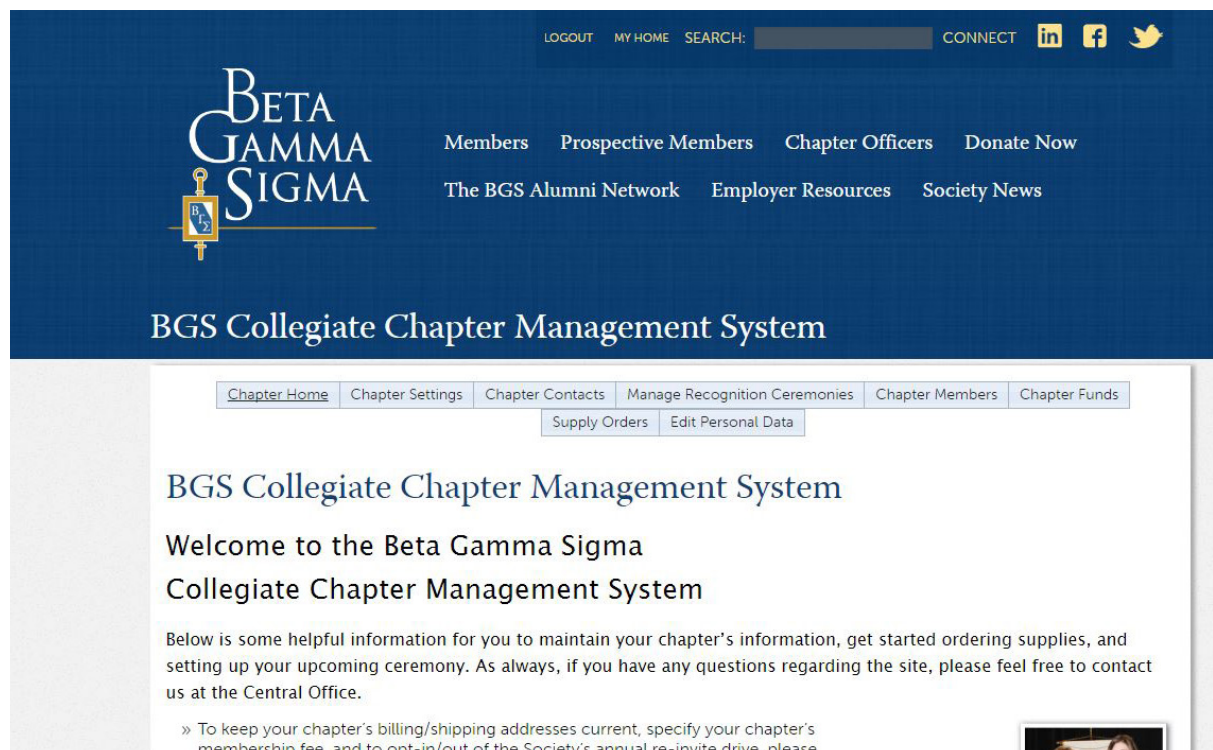
- Continue follow-up to non-responses as long as chapter chooses
- Following end of academic year, BGS Global Headquarters sends a follow-up invitation to membership to remaining eligible invitees through a direct email invitation
- Additional orders generated every 14 days following the ceremony date for late inductees

INITIAL INSTRUCTIONS FOR FIRST TIME USERS

LOGIN INSTRUCTIONS

- Go to www.betagammasigma.org
- *If you are a brand new chapter contact*, please follow the instructions you received via email from Beta Gamma Sigma upon being entered into the system.
- *If you are an existing chapter contact* and have forgotten your password, please contact your Chapter Manager for log-in assistance.
- Once you have successfully logged into the BGS website, you will be able to access the Collegiate Chapter Resources section of the site. To do so, click the “Chapter Officers” link in the top navigation menu. Once the Chapter Officers page loads, click the “Collegiate Chapter Officer Resources” link in the left hand column to enter the section of the site reserved for officers of the Society’s collegiate chapters.
- To access the Chapter Management System homepage, click its link in the left hand column. For future reference, you may want to bookmark the direct link of www.betagammasigma.org/cms.

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The above is a snapshot of the Chapter Management System (CMS) home page.

CHAPTER SETTINGS TAB

YOUR CHAPTER'S PRIMARY INFORMATION –
ALL CHAPTER SETTINGS & PREFERENCES

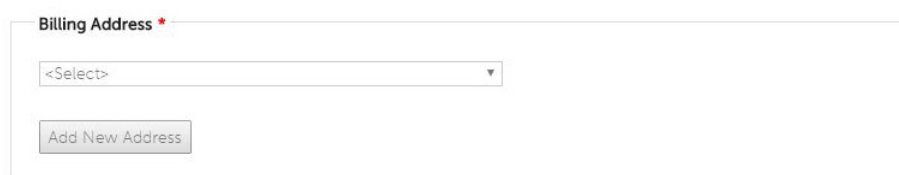
*Please note any changes will not be saved until you click the “Save Chapter” button at the bottom of the page. All required fields are indicated by an asterisk**

SECTION I: GENERAL CHAPTER INFORMATION

- Chapter Name and Number (not editable by chapter)
- Name of Business School
- Primary Chapter contact information including phone, fax, and email

SECTION II: BILLING & SHIPPING ADDRESSES

- This section requires that you enter a billing address.
 - ▶ The CMS will default to the billing and shipping address listed in the drop down menu. Please make sure your correct address is selected as all supply and certificate orders and invoices will be sent to these respective addresses.
- To add a billing address, choose <Select> in the dropdown menu and click the “**Add New Address**” button.
 - ▶ After entering the information, click the “**Save Address Information**” button.
 - ▶ Click “**Save Chapter**” at the bottom of the page to save any changes or additions.




Billing Address *

<Select>

Add New Address

- To edit an existing billing address, select the address in the dropdown menu and click “**Edit Address**.”
 - ▶ After entering the information, click the “**Save Address Information**” button.
 - ▶ Click “**Save Chapter**” at the bottom of the page to save any changes or additions.



Billing Address *

Home - 125 Weldon Parkway - Maryland Heights, - 63043

Edit Address Delete

CHAPTER SETTINGS TAB (continued)

- Your current shipping address is displayed.
 - ▶ If you need to update your shipping address, please click the 'Request Address Change' button. It will send an email to bgshonors@betagammasigma.org with the Subject Line: UPDATE CHAPTER SHIPPING ADDRESS.
 - ▶ Use the below format when sending your new shipping address:
 - Attention to: Contact Name
 - University/College Name
 - Business School Name
 - Street Address
 - Room/Unit/P.O. Box Number
 - City, State* Zip Code (if applicable)
 - Country
 - Contact person's email address (to receive tracking information)

Shipping Address *

Business (Preferred) - 125 Weldon Pkwy - Maryland Heights, MO - 63043 ▼

[Request Address Change](#)

CHAPTER SETTINGS TAB (continued)

SECTION III: CHAPTER RE-INVITE FEE

- As of the 2015-2016 academic year, chapters no longer have the option to opt-out of the re-invite program.
- All students that do not accept membership in an academic year (between July 1st and June 30th) will receive a re-invite message.
 - ▶ Eligible members with ceremony dates from July 1st through January 31st will be reinvited in April of that academic year.
 - ▶ Eligible members with ceremony dates from February 1st through April 30th will be reinvited in June of that academic year.
 - ▶ Eligible members with ceremony dates from May 1st through June 30th will be re-invited in August of the next academic year.
- The CMS is designed to collect the re-invite membership fee directly from each member via credit card.
- **The standard re-invite membership fee is 75 USD.**
- If a chapter charges the standard re-invite membership fee, select “Use Standard Fee” and all members will be charged 75 USD.

Chapter Re-Invite Fee Settings

☒ Use Standard Fee ☐ Specify Fee

Standard Re-Invite Fee

75.00

CHAPTER SETTINGS TAB (continued)

- If a chapter charges more or less than the standard re-invite membership fee, select **"Specify Fee"**
 - ▶ Enter the total amount that your students will be asked to pay in the white box titled **"Chapter Re-Invite Fee"**.
 - ▶ For example, if your chapter charges an additional 11 USD, you will need to enter 86.00 into the **"Chapter Re-Invite Fee"** box.
 - ▶ For example, if your chapter charges 10 USD less than the 75 USD, you will need to enter 65.00 into the **"Chapter Re-Invite Fee"** box.

Chapter Re-Invite Fee Settings

☐ Use Standard Fee ☒ Specify Fee

Standard Re-Invite Fee

75.00

Chapter Re-Invite Fee *

100.00

- ▶ Chapters that subsidize the membership fee for students will be invoiced by the Global Headquarters.
- ▶ Chapters that charge an additional fee will be able to request these funds via the **"Chapter Funds"** tab (see page 23 for more information).
- ▶ Click **"Save Chapter"** at the bottom of the page to save any changes or additions.

CHAPTER SETTINGS TAB (continued)

SECTION IV: CERTIFICATE BATCH ORDER SETTINGS

CERTIFICATE FORMAT:

- By default, all chapters will receive printed membership certificates for their members.
- If a chapter prefers that their members ONLY receive a PDF of their certificate instead of a printed copy, de-select the **“We would prefer printed certificates”** check box.
 - ▶ Please note these changes cannot be made on an individual basis.

SHIPPING SCHEDULE:

- Printed certificates will automatically default to the **“Use the default BGS batch schedule”**
 - ▶ Orders will be generated according to the dates listed on the schedule below. These are the dates on which the order will be generated, NOT the date orders will arrive.

Chapter Location	Days prior to ceremony when order will generate (not necessarily when order will ship)	Average Transit Time (Days)
US - Midwest	11	2
US - Eastern Seaboard/Southwest	13	3
US - West Coast	15	4-5
Canada	16	6-7
Europe	16	6-7
Asia	16	5-7
South America	18	6-7

*Contact your chapter manager to determine which location your chapter falls under.

CHAPTER CONTACTS TAB

EDITING YOUR CHAPTER ADVISOR AND ADMIN INFORMATION

This section lists your chapter's current contacts. Anyone listed here will have access to the Chapter Management System. There should be at least one person listed, preferably the Chapter Advisor. You can add or remove chapter contacts as their role with the chapter changes.

Note: Remember to always have at least one user listed and remove those that are no longer associated with the chapter or do not need access to the CMS.

VIEW CURRENT CHAPTER CONTACTS:

- To view the list of contacts on file for your chapter, select the **"Chapter Contacts"** tab. Click the **"Load Users"** button in the **"Search Users"** section. A list of the various contacts that have access to the CMS will appear.
- To edit a contact's information, click the **"edit"** button to the far right of their name. When clicked, the information for that contact can be viewed, edited, and saved.

Collegiate Chapter Contacts

» Need help? [View the tutorial for this section of the Chapter Management System](#)

Manage Contacts

Use the controls below to search for existing Users/Contacts or add a new User and select their Contact Type by clicking the 'Add New User' button.

Search Users

First Name

Last Name

Email

FOLLOW THESE STEPS TO REMOVE A CONTACT FROM YOUR CHAPTER'S LIST:

- Click the **"Edit"** link to the right of the individual's name.
- Scroll down to the **"Contact Type"** section.
- Select the **"Not a Contact"** option.
 - Uncheck the box "I would like to receive chapter emails" so they no longer receive chapter emails.
- Click **"Save User"** at the bottom of the page. The individual should no longer be listed as a chapter contact and will no longer receive chapter contact emails from BGS.
- Please note that you have to re-load your contact list by clicking **"Load Users"** in order to see this change reflected.

CHAPTER CONTACTS TAB (continued)

TO ADD A USER TO THE SYSTEM, PLEASE FOLLOW THE STEPS BELOW:

- First, click the **"Add New User"** button.
- After the screen refreshes, populate the individual's information. The following fields are required:
 - First Name
 - Last Name
 - Address
 - Email Address
- Select the appropriate option (Advisor, Admin, Co-Advisor) from the **"Contact Type"** drop down menu.
 - ▶ If you have a new Business School dean, please send the name and email address to your Chapter Manager.
- Create an initial "Username" for the contact (typically their email address). A password will be auto-generated and emailed to the new contact.
- Click the **"Save User"** button.
- The individual will be added to the list of chapter contacts.
- Please note that you have to re-load your contact list by clicking **"Load Users"** in order to see this change reflected.

MANAGE RECOGNITION CEREMONIES TAB

Add your chapter's upcoming ceremony date

ADDING A NEW MEMBERSHIP RECOGNITION CEREMONY DATE

- First, click the **"Add New Ceremony"** button.
- Under the "Add Ceremony" section, select the date of your ceremony by typing it in manually or using the calendar feature.
- Input the cost of membership for each induction type (explanations below under Chapter Fee Settings.)
- Select your shipping address. (See page 7 for instructions on changing your shipping address.)

Click **"Save Ceremony"** when you have completed the above steps. The new ceremony will appear in the table at the top of the page.

- *If you need to change your ceremony date, contact your chapter manager. Your chapter manager's contact information is located on the CMS homepage.*

DELETING A NEW MEMBERSHIP RECOGNITION CEREMONY DATE

- Deleting a ceremony date can only be done if you have not invited any students to that specific ceremony date.
- Click **"Delete"** next to the corresponding ceremony date. Follow the prompts to complete the deletion process.

CHAPTER FEE SETTINGS

- The CMS is designed to collect membership fees directly from members via credit card.
- The standard membership fee is 75 USD.
- By default, the 'Use Standard Fee' option is selected. If this box is checked, the individual will be charged the standard induction fee of 75 USD.
- *Please note: The standard fee varies for the following induction types: Masters Second Recognition (10.00), Doctoral (0.00) and Doctoral Second Recognition students (0.00)*

*In order to charge the standard fee for these induction types, please check the box under the **"Use Standard Fee"** column

CHAPTER FEE SETTINGS (continued)

Induction Type	Use Standard Fee	Invite Fee
Junior	<input checked="" type="checkbox"/>	75.00
Sophomore	<input checked="" type="checkbox"/>	75.00
Senior	<input checked="" type="checkbox"/>	75.00

- If a chapter charges more or less than the standard membership fee, uncheck the box under the column 'Use Standard Fee'. When unchecked, the box under the 'Invite Fee' column is now white and editable. Insert the TOTAL amount you are charging members.

Induction Type	Use Standard Fee	Invite Fee
Junior	<input type="checkbox"/>	93.00
Sophomore	<input type="checkbox"/>	93.00
Senior	<input type="checkbox"/>	93.00

- For example, if your chapter charges an additional 18 USD, you will need to enter 93.00 into the "Invite Fee" box.

CHAPTER FEE SETTINGS (continued)

- For example, if your chapter charges 50 USD less than the 75 USD, you will need to enter 25.00 into the **"Invite Fee"** box.

Induction Type	Use Standard Fee	Invite Fee
Junior	<input type="checkbox"/>	<input type="text" value="25.00"/>
Sophomore	<input type="checkbox"/>	<input type="text" value="25.00"/>
Senior	<input type="checkbox"/>	<input type="text" value="25.00"/>

- ▶ Chapters that subsidize the membership fee for students will be invoiced by the Global Headquarters.
- ▶ Chapters that charge an additional fee will be able to request these funds via the **"Chapter Funds"** tab (see page 23 for more information).

Verify your shipping address. If the address listed is incorrect, please email bgshonors@betagammastigma.org with the Subject Line: UPDATE CHAPTER SHIPPING ADDRESS.

- ▶ Use the below format when sending your new shipping address:
 - Attention to: Contact Name
 - University/College Name
 - Business School Name
 - Street Address
 - Room/Unit/P.O. Box Number
 - City, State* Zip Code*
 - *if applicable
 - Country
 - Contact person's email address (to receive tracking information)

Click **"Save Chapter"** at the bottom of the page to save any changes or additions.

CHAPTER FEE SETTINGS (continued)

EDITING AN EXITING CEREMONY

- If you need to change your ceremony date or membership fee, contact your chapter manager.
Your chapter manager's contact information is located on the CMS homepage.

TRACKING MEMBERSHIP ACCEPTANCE

- You can quickly view acceptance data using the table on this tab.
 - ▶ Invited: Number of students that were invited for that ceremony date.
 - ▶ Re-invited: Number of students that did not join immediately, but were invited through the Global Headquarters's annual re-invite campaign.
 - ▶ Accepted: The total number of students that chose to accept membership.

Ceremony Date ▼	Date Added	Invited	Re-Invited	Accepted		
12/25/2016	7/22/2016 12:36:36 PM	12		1	Edit	Delete
6/26/2016	2/8/2016 10:35:38 AM	128	123	5	Edit	Delete

- If you would like to view a list of the names of those who have accepted, please visit the "Chapter Members" tab.

CHAPTER MEMBERS TAB

Invite, Track, Remind, and Export Members

ADDING NEW POTENTIAL MEMBERS:

- Start by clicking the **“Add New Members”** button.
- Once the page refreshes, you will be able to select between two methods for adding invitees into the CMS.

OPTION 1: MANUALLY ENTER NEW UNPAID POTENTIAL MEMBERS:

- Select a **“Ceremony Date.”** Only dates already created under the “Manage Recognition Ceremonies” tab will appear as options.
- Input the invitee’s name, email, and phone (optional).
- Select the **“Induction Type”** from the dropdown menu.
- Click the **“Save Member”** button.

Add Members

☒ Option 1: Manually enter new Unpaid Potential Member
☐ Option 2: Upload list of new Unpaid Potential Members

Ceremony Date *
<None> ▼

First Name *

Last Name *

Phone

Email *

Induction Type *
<Select> ▼

CHAPTER MEMBERS TAB (continued)

OPTION 2: UPLOAD LIST OF NEW UNPAID POTENTIAL MEMBERS:

- Select a **“Ceremony Date”**. Only dates already created under the “Manage Recognition Ceremonies” tab will appear as options.
- Select the **“Induction Type”** from the dropdown menu.
- *Note: You will need to upload a separate list for each “Induction Type.”*
- Browse and select a CSV file of the students you wish to invite. Please note the CMS requires a very specific format to accept the upload. A template is available for download. For further assistance creating your CSV file, see the Creating a CSV file section below.
- Click the **“Save Member List”** button.

Add Members

☐ Option 1: Manually enter new Unpaid Potential Member
☒ Option 2: Upload list of new Unpaid Potential Members

Ceremony Date *
 12/25/2016 ▼

Induction Type *
 Sophomore ▼

CSV File *
 Choose File No file chosen

[Click here to download template](#)

Save Member List Cancel

CREATING A CSV FILE:

- To upload lists of eligible names, we used the Comma Delimited File format or “CSV files.”
- **A separate list and CSV file will need to be created for each induction type.**
- To create your list, use Microsoft Excel or a similar program.
- The files should only have four columns of data and the header row should use the following entries: first name, last name, email, phone. Even if you do not intent to upload phone numbers, the heading must be included in the file. Any additional columns of information will cause your list to upload improperly.
- A sample CSV file can be downloaded from the Chapter Member section of the CMS.
The first row of this template is sample data and must be deleted before you add your chapter’s information.

	A	B	C	D
1	First Name	Last Name	Email	Phone
2	Barney	Rubble	brubble@sample.edu	555-555-5551
3	Charlie	Brown	cbrown@sample.edu	555-555-5552
4	Peter	Pan	ppan@sample.edu	555-555-5553

CHAPTER MEMBERS TAB (continued)

- Once you have all the names in your spreadsheet that you would like to upload, you will go to **File » Save As » Change the “Save as Type”** to CSV (Comma delimited) from the dropdown menu » Name your file and select the location of the file » **Save**.
- Be sure to close the file before attempting to upload to the site.

VERIFYING POTENTIAL NEW MEMBER RECORDS:

- After adding invited members to the system a verification screen will appear. Please double check the information. If it is correct, click **“Continue.”** If it is incorrect, please click **“Back,”** and make any needed changes.
- Clicking **“Continue”** will add the potential members to your chapter’s database in the CMS and will automatically send the individuals an invitation email. See the Invitation Email section on page 15 for more information.
- Clicking **“Cancel”** will exit the process, and the records will not be added to your list of invitees.

Manage Chapter Members

Add Members

Verify the following information is accurate and select the button 'Continue' below to complete adding Member records.

First Name	Last Name	Email	Phone	Chapter	Ceremony Date	Induction Type	Fee	Status	
Jane	Doe	jdoe@sample.edu		Test Chapter - Do Not Print	6/26/2016	Junior	\$0.00	Add New Record	Edit

INVITATION EMAIL:

- Once an invitee is added to the CMS, they will AUTOMATICALLY receive an invitation email.
- The email will include a unique link for each member to complete their Membership Data Profile (MDP). *The MDP link is no longer a universal link that can be used by all students.*
- The email will also include a reference to the fee (as specified in the Manage Recognition Ceremonies section, see page 13) the invited member will be asked to pay upon completion of his/her MDP.
- At this time, the only customizable items within this email are the student’s name, the chapter name, and the fee.



Congratulations! **You've been invited to join the "Best in Business."**

Test Chapter US West,

As one of the very best business students at Test Chapter - Do Not Print, you have earned the invitation to lifetime membership in the International Honor Society Beta Gamma Sigma.

Membership in Beta Gamma Sigma is the highest recognition a business student anywhere in the world can receive in a baccalaureate or post-baccalaureate program accredited by AACSB International - The Association to Advance Collegiate Schools of Business.

Your eligibility for membership places you in a very select group. Membership is restricted to outstanding scholars in the world's very best business and management programs. Your school has recognized you as one of its most outstanding scholars by offering this invitation.

Congratulations on your high achievement!

To take advantage of this opportunity, follow the link below. You will be directed to the Society's online Membership Data Profile. Once you have completed your profile and submitted your payment (a one time fee of \$75.00 USD), your membership will be activated and you will be entitled to all the benefits and opportunities available to lifetime members of Beta Gamma Sigma.



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Please go to the following URL to complete your Membership Data Profile:

<https://www.betagammasigma.org/mdp?id=0v8xz7XUCHYn3j7gpGFtjg%3d%3d>

TO VIEW INVITED MEMBERS:

- Use the functionality available in the “Search Members” section of the “Chapter Members” tab.
- *If you are looking for information about a particular invitee*, add his/her information to the “First Name,” “Last Name” and/or “Email” fields in the “Search Members” section of the page and click the ‘Load Members’ button.
- *If you are looking for information about a group of invitees*, select your desired criteria from the “Status” and “Ceremony Date” dropdowns in the “Search Members” section of the page and click the “Load Members” button.

UNDERSTANDING THE INFORMATION IN THE SEARCH MEMBERS STATUS DROP-DOWN MENU:

- All Invitees - this will pull a list of everyone you have invited through CMS
- Unpaid Potential Members - this will pull a list of everyone you have invited and who have not accepted membership
- Unpaid Potential Members not yet Reminded - this will pull a list of all invited students who have not accepted and you have yet to send a reminder email
- Unpaid Potential Members not yet Re-Invited - this will pull a list of all invited students who have not accepted and have not been re-invited by the Global Headquarters
- Unpaid Reminded Potential Members - this will pull a list of all invited students who have not accepted and have been sent a reminder email
- Unpaid Re-Invited Potential Members - this will pull a list of all invited students who have not accepted and have been re-invited by the Global Headquarters
- Paid/Accepted Members - this will pull a list of all invited students who have accepted
- Paid/Re-Invited Members - this will pull a list of all re-invited students who have accepted

UNDERSTANDING THE BUTTONS ON THE “CHAPTER MEMBERS” TAB

Showing 1 - 1 of 1 Results					Show 25 items in page			
Selected	Ceremony Date	First Name	Last Name	Email	Induction Type	Accepted	Member Number	
<input type="checkbox"/>	6/26/2016	John	Smith	asdfsad@aafdg.com	Masters			Edit
Select All					Export	Remind	Delete	

- **Select All** – Use this button to select or de-select the entire list. Be sure that you do not have any members selected when clicking this button.
- **Export** – Use this button to export a list of selected invitees into a CSV file. This file will include the first name, last name, email address, phone number, name on certificate, induction type, induction year, ceremony date, MDP URL, member number (listed as badge number), and address information. The MDP URL is the unique link for each invitee’s profile.
- **Remind** – Use this button to send reminders to those invitees who have yet to accept.
- **Delete** – Use this button to delete invitees that were added in error.

EDITING THE INFORMATION FOR POTENTIAL MEMBERS:

- Should you need to edit an invitee's name or email address, click the "Edit" link to the far right of the individual's record.
- Chapters do not have the ability to update "Ceremony Date" or "Induction Type." If you need this field updated, contact your Chapter manager.
- *Note: Information can only be changed for potential members. Once an invitee accepts membership and pays their fees, chapter contacts will not be able to make any further changes to the record.*

REMINDING POTENTIAL MEMBERS ABOUT THE OPPORTUNITY TO JOIN BGS:

- Invitees can be reminded about their pending invitation at any time through CMS.
 - ▶ Select all invitees to remind by selecting their respective checkboxes, clicking the "Remind" button at the bottom of the screen, and following the prompts.
 - To select all students at once, click the "Select All" button.
- A reminder email will be sent to all selected invitees.

DELETING A POTENTIAL MEMBER:

- Select all invitees to remove from the list using the checkboxes at the left of the list and click the "**Delete**" button at the bottom of the screen.

CHAPTER FUNDS TAB

Managing Financial Transactions in the CMS

This section of the CMS has been designed to help keep track of your chapter's financials including invoices and chapter funds.

HOW FUNDS ARE TRACKED:

- The "Chapter Funds" tab tracks all membership fees accepted through the CMS
- At the top of the page you will see your chapter's account balance.
- Click the words "Account Balance" to view your chapter's fund account activity.

Collegiate Chapter Funds

» Need help? [View the tutorial for this section of the Chapter Management System](#)

Manage Chapter Funds

Account Balance: \$82.00

[Request Payments](#)

There are outstanding invoices requested for payment.

[Load Outstanding Invoices](#)

Invoice #	Amount	Requested	Details	Note		
BGS001701INV	\$67.00	2/11/2016			View	Pay
BGS001659INV	\$67.00	1/20/2016			View	Pay
BGS001657INV	\$25.00	1/20/2016			View	Pay

HOW TO REQUEST FUNDS

If your chapter charges more than the standard fee of 75 USD:

- The surplus funds will be accumulated and will be viewable at the top of your screen
- These funds can be sent to your chapter via check by clicking the "Request Payments" button or they can be applied to an invoice (please see page 24 for more instructions).

If your chapter charges less than the standard fee of 75 USD:

- The Society will charge the chapter 75 USD per accepted member (with the exception of doctoral members and second recognition members).
- Your chapter will be invoiced for the difference between the standard fee of 75 USD and the amount you have asked your members to pay.

For example, if you only ask your members to pay 50 USD, your chapter will receive an invoice for 25 USD per accepted member.

HOW FUNDS ARE CALCULATED FOR EACH INDUCTION TYPE:

- All induction types with the exception of Second Recognitions and Doctoral students will be charged the amount as specified by the chapter on the "Manage Recognition Ceremonies" tab of the CMS (*see page 13*).

CHAPTER FUNDS TAB (continued)

HOW FUNDS ARE CALCULATED FOR EACH INDUCTION TYPE:

- All induction types with the exception of Second Recognitions and Doctoral students will be charged the amount as specified by the chapter on the “Manage Recognition Ceremonies” tab of the CMS (see page 13).
- The standard fee for a Masters Second Recognition is 10 USD.
This is the amount that will be charged if the chapter selects to charge the standard fee of 10 USD.

If your chapter charges an additional fee, you will need to add this additional amount to the 10 USD fee. For example, if you set your fee to 20 USD, a Masters Second Recognition will be asked to pay 20 USD.

- The standard fee for Doctoral members is 0 USD.
This is the amount that will be charged if the chapter selects to charge the standard fee of 0 USD.

If your chapter charges an additional fee, the chapter will need to input the total amount the member will pay prior to inviting the doctorals through the CMS.

PAYING CHAPTER INVOICES:

- An invoice will be emailed to the chapter contact specified on the billing address on the “Chapter Settings” tab. Once this email has been sent, a notification will appear on the “Chapter Funds” screen.

There are outstanding invoices requested for payment.

[Load Outstanding Invoices](#)

Invoice #	Amount	Requested	Details	Note		
BGS001701INV	\$67.00	2/11/2016			View	Pay

- Chapter contacts can choose to “View” or “Pay” the invoice from this screen.
- Viewing the invoice will provide an itemized view of all the charges the chapter is responsible to pay.
- Name/Description: The name of the inductee or the supply order request
- Date: The date of the transaction
- Amount: The amount already paid to Beta Gamma Sigma
- Location Fee: The standard 75 USD fee charged by Beta Gamma Sigma
- Chapter Fee: The amount charged by the Chapter
- Subtotal: The amount the Chapter owes to BGS

CHAPTER FUNDS TAB (continued)

- In the example below, Beta University's Chapter Fee is set at 5 USD, creating a 70 USD deficit for this induction.

View Invoice

Modify the invoice information below and press "Save Invoice" when you are finished.

Invoice Number: BGS002828INV

Chapter: Test Chapter - Do Not Print

Amount: \$80.00

Requested: 9/21/2016

Note:

** indicates that a second recognition was applied*

Name/Description	Refunded	Date	Amount	Location Fee	Chapter Fee	Subtotal
Robert Smith (Junior)	<input type="checkbox"/>	9/21/2016 6:55:41 AM	\$5.00	\$75.00	\$ 5.00	\$70.00

Chapter invoices may be paid using any combination of applying chapter funds, credit card, and check.

SUPPLY ORDERS TAB

CREATING NEW ORDERS:

- To place an order, start by clicking the “Create New Order” button.
- Once the page refreshes, a list of all the items available for purchase through the CMS will be visible along with photos and a brief description of each of the items.
- To order an item, type the desired amount of said item into the “Quantity” field. The items will be added to your cart and the “Subtotal” for that particular item will update.
- *Note: Once you have started placing a supply order, do not navigate away from the page. Additionally if you need to change the quantity of an item, do not click the backspace button on your keyboard. (Instead, highlight the field and input the correct quantity.) If you do, your order information may be lost, and you may have to start over at the beginning.*
- To view your chosen items and their selected quantities, click the “Go to Cart” button.
- If you would like to add more items, click the “Back to Supply Order” button.
- If you are ready to submit your order, click the “Proceed to Checkout” button.

CHECKING OUT:

- The first screen you will come to upon clicking the “Proceed to Checkout” button will provide you with information about your order, including the number of items ordered and the cost of the order.
- Verify your shipping address listed. If your shipping address listed is incorrect, please email bgshonors@betagammasigma.org with the Subject Line: UPDATE CHAPTER SHIPPING ADDRESS.
 - Use the below format when sending your new shipping address:
 - Attention to: Contact Name
 - University/College Name
 - Business School Name
 - Street Address
 - Room/Unit/P.O. Box Number
 - City, State* Zip Code*
 - if applicable
 - Country
 - Contact person’s email address (to receive tracking information)
- Select the shipping method for this order.
- If you select either the 2nd Day or Overnight option, the chapter will be responsible for the additional expedited shipping costs for the order.
- If you ordered any items that require customizing, such as custom banners, please complete the “Customized Printing” section of the page. If you did not order any customizable items, feel free to disregard this section.
- Any additional information about the order can be added to the “Comments” box at the bottom of the page.
- To submit your final order, click “Submit Supply Order” at the bottom of the page.

SEARCHING ORDERS:

- Chapters can check the status of an order at any time using the “Search Supply Orders” tool on the main “Supply Orders” tab.
- The Beta Gamma Sigma Global Headquarters will update information about all orders as they are received and processed.
- Chapters may search for specific orders using the available fields, or may view a list of all recorded supply orders by leaving the fields blank and clicking the “Load Supply Orders” button.
- Details including the “Order Number,” “Order Date,” and “Amount” will be displayed for each order.
- The status of each order will be shown as “Requested,” “Processing,” or “Processed.”
- Details of any order can be reviewed by clicking the “View” button next to its entry within the list.
- Once the Global Headquarters has processed an order, additional information – including shipping cost – will be added to the order’s details.
- A tracking link will be emailed to the email address associated with the shipping address as specified on the “Chapter Settings” tab of the CMS. The link will be emailed by UPS shortly after the order is picked up.

PAYING FOR ORDERS:

- All orders, including any applicable shipping costs, will be added to invoices issued by the Global Headquarters via the CMS.
- Invoices can be paid using the “Chapter Funds” tab of the CMS.
- Any money available in the chapter’s fund may be applied to the order by selecting the “Apply Account Funds” option at the top of the page and specifying the exact amount to apply towards the order.

EDIT PERSONAL DATA TAB

This page will allow you to keep your information current with Beta Gamma Sigma.

- Please review all the information on this page and make any edits or additions by clicking within the fields
- Any changes or additions made to your information within the CMS will also be made to your account on the BGS website and within the BGS database.
- When you are done making changes and additions, click the “Save User Information” button at the bottom of the page.
- Please note that updating information here does NOT update any of the information listed on the “Chapter Settings” tab.
- Additional information, including your username and password, can be updated by clicking the “My Home” link at the very top of the Beta Gamma Sigma website.