

Instructions / Checklist for the New Beta Gamma Sigma Online Ordering System

Welcome to the new BGS Online Ordering System. Beta Gamma Sigma has worked hard to develop this new system and it should make the process of inviting potential members and processing new memberships much more efficient and accurate. BGS appreciates the patience and support of its chapter representatives as this new system is rolled out over the next semester. Donna Binek of the Central Office staff is available to work with your chapter individually to further clarify and answer questions. She may be contacted at dbinek@betagamma.org or by phone at 1-800-337-4677 (U.S.) or 1-314-432-5650.

Chapter Administration

- To get started, go to <http://www.bgschapterservices.org>.
- Enter your Username and Password. (**NOTE:** Initially, one username and password will be provided (emailed) by Beta Gamma Sigma to the official chapter advisor.) You will arrive at the “Administrate Chapter” page, which is where chapter information is stored.
- Go to the “Edit Personal Data” tab at the top of the page. This is where you will need to change (personalize) your Password, as well as your Security Question and Answer. (**NOTE:** Initially the Security Question and Answer is pre-populated on the site with generic information.)
- Return to the “Administrate Chapter” page and make any necessary additions / changes to your contact information. You can also add the information of any other chapter representatives that will be accessing the site. (**NOTE:** If you are accessing the site using the faculty advisor’s login information provided by BGS, please don’t delete that information unless you are the new faculty advisor. If you are any other chapter representative, please add a new record.) You can add a new record by clicking “Add New Chapter Contact” and populating the fields with all necessary information. You then click “Save Chapter Contact”.
- As necessary you can add / edit / delete any of the Shipping and/or Billing addresses on this page by clicking the “Add/Edit Shipping/Billing Addresses” in the middle section of the page.

Ordering Collegiate Chapter Supplies

- Chapter representatives should calculate (or estimate) the number of students and faculty eligible for induction. (**NOTE:** This should be done following the same eligibility criteria as before.)
- After estimating the number of students and faculty eligible for invitation, return to <http://www.bgschapterservices.org> and click the “Supply Order” tab at the top of the page.
- Click on “Place Online Supply Order” at the bottom of the page.
- Select the correct Shipping Address.
- Select the desired Shipping Method.
- Fill out all items needed on Supply Order Form and hit “Save and Send Supply Order”.
- An email confirmation will be sent to the chapter representative confirming the Supply Order submitted.

Inviting Eligible Students

- Chapter representatives should obtain the list of those eligible for membership. (**NOTE:** *This should be done in the same way as before.*)
- Return to the Online Ordering System at <http://www.bgschapterservices.org> and click the “Manage Induction Ceremony” tab. This is where you will create, edit and maintain all information pertaining to the induction ceremony - including the date of the ceremony and the invitees associated with that date. (**NOTE:** *The ceremony date is very important throughout the order process. You will return to the ceremony date when you need to add or edit information for a specific ceremony.*)
- Go to the “Add/Edit Induction Ceremony” section and select (or add a new) induction ceremony date by using the Calendar feature.
- Select the address for shipment of the membership certificates, lapel pins and new member packets.
- Click “Save Induction Ceremony”.
- Go to the “Edit Existing Induction Ceremony” and select the correct date from the drop-down box. Click “Edit Ceremony”. (**NOTE:** *You will need to select “Edit Ceremony” on each subsequent visit to the site to find the list of names associated to that particular induction ceremony date.*)
- Enter all information for each eligible person into the “Add Eligible Members” section of the “Add/Edit Induction Ceremony” box. After all information is entered for that eligible person, click on the “Add Eligible Member” button to the right. (**NOTE:** *After you click on “Add Eligible Member”, the member’s name will appear in the following section: “Unpaid Potential Members”.*)

Monitoring of Membership Acceptances (Critical)

- After receiving payment from a new member, return to the “Manage Induction Ceremony” page, select the Ceremony date from the drop-down, and hit the “Edit Ceremony” button. Check the box next to the new member’s name in the “Un-Paid Potential Members” section, marking that member as “Paid”. (**NOTE:** *This is something that MUST be done on a regular, ongoing basis.*)
- After marking the member as “Paid”, click on “Save Paid” at the bottom of that section and the name will move to the “Paid Members” section. (**NOTE:** *At this point, an email will be generated to the new member at the email address entered into the system providing them with a link to the on-line Membership Data Profile or MDP.*)
- To better assure completion of all new member MDPs, please follow up with all newly paid members by supplying them with the web address of the MDP form - <http://www.bgschapterservices.org/UI/member/memberintro.aspx>.
- On an ongoing basis, follow up with those that were invited but did not accept Beta Gamma Sigma membership.
- Follow up with those that accepted membership and paid, but did not fill out the Membership Data Profile (MDP). (**Note:** *Faculty advisors will receive email notification of members that have not filled out MDPs; completion of the MDP triggers the generation of membership certificates.*)