



# Online Ordering System

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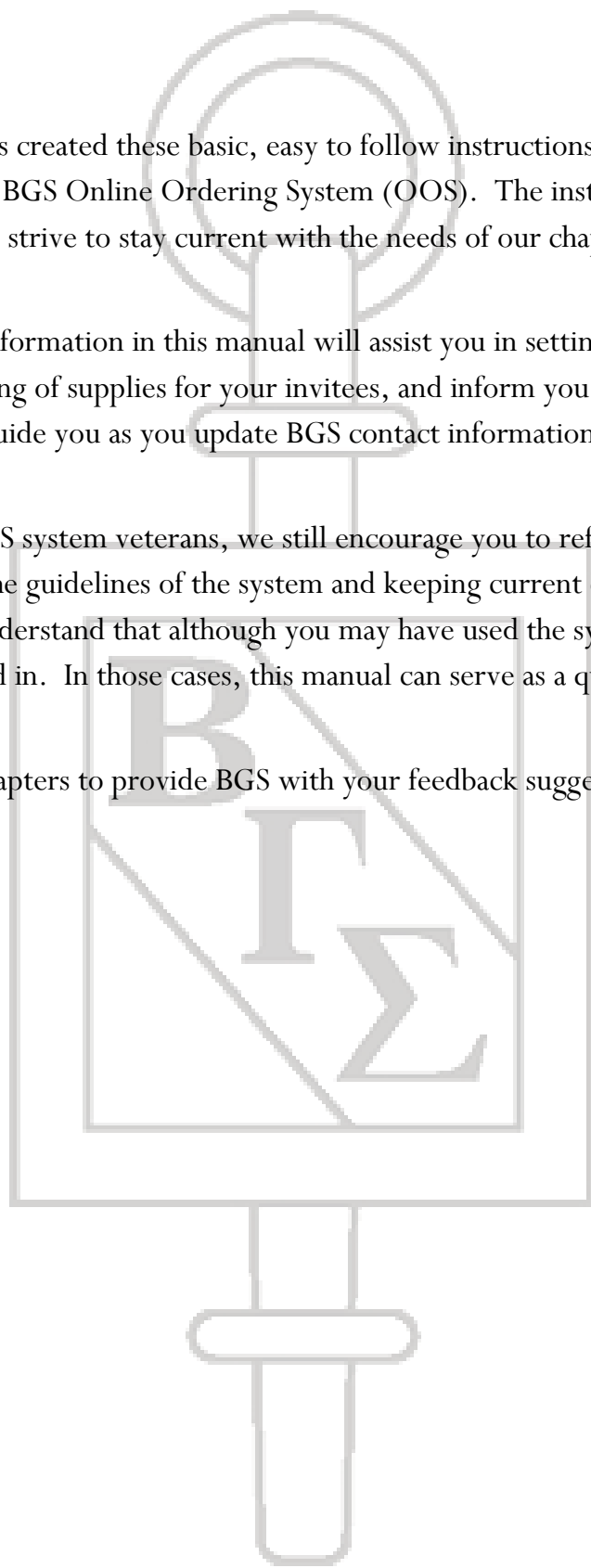
## Introduction

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 Online Ordering System (OOS). The instructions in this manual will continue to be updated as we strive to stay current with the needs of our chapters.

If you are new to BGS, the information in this manual will assist you in setting up your ceremony date, guide you through the ordering of supplies for your invitees, and inform you of the automated Certificate Order process. It will also guide you as you update BGS contact information.

For those of you that are OOS system veterans, we still encourage you to refer to this manual to make sure that you are following the guidelines of the system and keeping current on the upgrades that BGS makes to the system. We understand that although you may have used the system in the past, it may have been a while since you logged in. In those cases, this manual can serve as a quick reference guide.

We always encourage our chapters to provide BGS with your feedback suggesting ways we can further improve our OOS system.



## OOS Membership Processing Timeline *(Sample)*

### Prior to Ceremony Date *(minimum time to allow)*

#### 9 – 12 Weeks

- ✓ Create or update chapter account/contact information in the OOS system at: <https://www.bgschapterservices.org>
- ✓ Identify eligible students and faculty; chapter nominating committee selects those to invite; elect to membership

#### 8 Weeks

- ✓ Order membership invitation Booklets and chapter supplies through OOS
- ✓ Input eligible member database through OOS

#### 7 Weeks

- ✓ Begin promoting Beta Gamma Sigma on campus
- ✓ Receive invitation packets and chapter supplies from BGS
- ✓ Create local invitation with details to include in invitation; assemble invitation packets

#### 6 Weeks

- ✓ Distribute invitation packets (in class tapping, in person or by mail)
- ✓ Identify current qualifying students at higher degree level who are already BGS members and offer them second recognition (See details on 2<sup>nd</sup> Recognition in 'Adding Potential Members' section)

#### 2 ½ - 6 Weeks

- ✓ Accept membership payments from each invited student and faculty member
- ✓ Note paid memberships in OOS database (ongoing activity)
- ✓ Automatic Email from OOS to newly paid members with the link to the MDP
- ✓ Receive automatic emails indicating new members who completed MDPs online
- ✓ Ongoing basis – personally encourage paid members to complete online MDPs
- ✓ Send follow-up email/call/note to invited students and faculty (non-responses) encouraging membership acceptance
- ✓ Notify BGS for special shipping requests (domestic orders will be shipped to chapters standard UPS unless otherwise requested)

## 8 – 14 Days

- ✓ BGS processes and ships initial (1<sup>st</sup>) chapter order

## 1 Week

- ✓ Chapter receives, proofs and prepares initial (1<sup>st</sup>) chapter membership order materials for ceremony

## 1 – 10 Days

- ✓ BGS processes and ships additional orders

## 1 – 8 Days

- ✓ Chapter receives, proofs and prepares additional chapter membership order materials for ceremony

## 0 Days

- ✓ Induction 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)
- ✓ Mail membership payment to Central Office (one payment for all memberships @ 65 USD per member, 10 USD for each 2<sup>nd</sup> Recognition, and a 2 USD shipping & handling fee per membership)(Doctoral fees are waived). Complete MDPs (as much information as available to you) for new members that did not complete their own. **NOTE:** Fourteen (14) days following induction ceremony date Central Office staff must create “generic” MDPs for remaining paid members (using only basic information – name, permanent address of school, email address, major or concentration, DOB, gender) in order to generate a ‘Final Order’ of new inductees and to reconcile chapter payment to members paid. **Chapters should note that this process by the Central Office will not provide correct and complete member contact information which can only be provided by the member or chapter.**
- ✓ Begin planning for next induction ceremony

## 14+ Days

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

## Initial Instructions for First Time Users

- ❖ Type the following website address into the address bar of your web browser:

<https://www.bgschapterservices.org>

- ❖ You will be brought to a login screen where you will enter the Username and Password provided to you by a member of the BGS staff. If you haven't received this information, please contact Donna Binek, at [dbinek@betagamma.org](mailto:dbinek@betagamma.org), at the BGS Central Office
- ❖ Once you have successfully logged into the OOS system, you will enter the Welcome page. On this page, you will be given brief information on the system, such as, which tab to click in order to perform certain functions
- ❖ If you click the 'Administrate Chapter' tab at the top of the page, you will be taken to the portion of the system that contains all of the contact information for your particular chapter. It is here that you will maintain all appropriate shipping and billing addresses for your site, as well as your login information. It is recommended at this point that you look over the information that BGS has for your chapter and check for accuracy. We also recommend that you scroll to the bottom of the page, to the 'Manage Chapter Contacts' section, and update your password (if you wish), as well as choose an appropriate Security Question and Answer
- ❖ Once you have all of the information updated for your chapter, you may now order supplies, create/edit a ceremony date, etc., by clicking any of the tabs at the top of the page, depending on where you are in the process

## The Pages of the OOS Site

### Chapter Home

- The Chapter Home page, or Welcome Page, contains helpful information on how to navigate through the site, as well as any updates that BGS has made to the site
- Within the navigational portion of the site are links that will take you to the pages that contain the information that you are looking for or the tasks that you wish to perform
- The bottom of this page also has the contact information for the BGS Central Office should you have any questions

### Administrate Chapter

#### ■ Chapter Primary Information

- This section of the page provides basic, general information on your chapter
  - School Name (not editable by chapter)
  - Chapter Number (not editable by chapter)
  - Chapter Name (not editable by chapter)
  - Name of Business School
  - Primary Chapter Email (this is usually the email address of the Chapter Advisor)
  - Assigned Location (not editable by chapter)
  - Other (notes)

#### ■ Manage Chapter Addresses

- This section is where the chapter maintains, and keeps current, all addresses associated with your chapter
- The delivery of your supplies and certificate/membership orders are shipped to the shipping address designated as your Primary Shipping address, unless otherwise assigned on the 'Supply Order' and/or the 'Manage Induction Ceremony' page
- The accounting department of BGS also uses the Primary Billing address to send out all invoices, so it is important to make sure this information is correct as well
- To update your Shipping/Billing addresses, please follow these simple instructions:
  - Click the 'Add/Edit Shipping/Billing Addresses' button (*Note that if you are using a pop-up blocker, the new window containing the edit function of the addresses will not open and*

*therefore you cannot update your address information. It is important to make sure that pop-ups are allowed on the BGS OOS site or your pop-up blocker is temporarily turned off)*

- Once the new window has opened, you will notice that the system automatically takes the first address in your list and populates it in the upper, right-hand section of the window (*Note that you are automatically in 'Edit' mode when the new window loads*)
- If necessary, make any changes to the existing address and then click the 'Save Shipping/Billing Address' button. Should you need to update another address, the rest of the addresses associated with your chapter will be listed at the bottom of the window under 'Associated Addresses'. You can either choose to edit an address or delete it
- If you need to add an additional address to the list, you will select the 'Add New Shipping/Billing Address' button in the middle, left-hand side of the window. The fields in the upper, right-hand side of the window will be blank so that you may enter the necessary information. Once again, when you are finished entering your new address, click the 'Save Shipping/Billing Address' button
- When you are finished editing, adding, or deleting addresses for your chapter, simply click the 'Close' button in the middle, right-hand side of the screen to be brought back to the main screen

- To select a new or existing address as the Primary Billing or Shipping address, simply use the dropdown menu under each respective address type.

## ■ Manage Chapter Contacts

- This section lists the current users, with login information, for your chapter. There should be at least one person listed, preferably the Chapter Advisor. You can add or remove as many users for your chapter as you would like. *Note: Remember to always have at least one user listed and remove those that are no longer associated with the chapter*
- Should you need to edit a current user's information, there is a built-in edit function, listed to the far right of the person's listing. When clicked, the information is populated below and can be changed and saved
  - Please note that you should NOT edit a user who is currently logged onto the system. This will create errors in the system and will block you from using either the old or the new login information
  - It is recommended that unless you are simply updating a current user's information, you create a new user and then delete the old user
- Next to the edit function is the ability to delete a current user, should you need to remove users from your site

- To add a user to the system, please follow the steps below:
  - First, click the 'Add New Chapter Contact', located directly below the list of current users on the right-hand side of your screen
  - After the screen refreshes, populate all of the information located in the section, including:
    - ✓ Prefix
    - ✓ First and Last Name
    - ✓ Title (i.e. Dean, Administrative Assistant, etc.)
    - ✓ Email Address
    - ✓ Phone Number
    - ✓ Complete Physical Address
    - ✓ Username and Password (*Password requires Confirmation*)
    - ✓ Security Question and Answer
    - ✓ Contact Type/Email Preference
  - Click the 'Save Chapter Contact' button

## **Manage Induction Ceremony**

- This is the page in the system that will contain all of the information for your Induction Ceremony, including the date of the actual ceremony, names of all those that are eligible for induction into BGS, as well as paid and reconciled members
- In the section below we will explain how to create new and edit existing ceremonies, add manually or upload new members to a particular induction ceremony, and track eligible and new members throughout the process
- **Creating a New Ceremony Date**
  - First, click the 'Add Ceremony' button located in the middle of the screen
  - Next, notice that after clicking the 'Add Ceremony' button, a new section appears below titled 'Manage Ceremony Settings and Members'
    - Select the date of your ceremony by typing it in manually or using the calendar feature
    - Select the shipping address that the certificate orders will be sent to after they are generated
    - Click the 'Save Ceremony' button
    - It is important to note that once you have saved your ceremony date to the system, the date cannot be changed by the user. Instead, if you entered an incorrect ceremony date or the date changes, there is a 'Request Date Change' function directly below the saved date that will prompt you to send an email to BGS. This email will allow you to inform BGS of the corrected

ceremony date. Once your date has been successfully changed by a staff member of BGS, you will be notified, via return email, that this action has been completed

- Once you have selected your ceremony date and shipping address, and saved the information for your ceremony, another new sub-section will appear – ‘Add Members’ (*Please see [‘Adding Potential Members’](#) further down in this section*)

## ■ Editing an Existing Induction Ceremony

- First, make sure that the date has already been added to the system by checking the list of dates on the right (*if the date does not appear, please refer to the [‘Adding a New Induction Ceremony’](#) section above*)
- Find your induction ceremony to the right of the screen and select the ‘Edit’ button to the left of that date
- Any information already added for this date will appear below, including all Eligible, Paid, and Reconciled Members

## ■ Adding Potential Members

- Once you have created a new ceremony, or chosen to edit an existing ceremony, the section entitled ‘Add Members’ will appear
- The function here has been added to incorporate all class levels including the 2<sup>nd</sup> Recognition Masters, Chapter Honorees, and Doctoral Students as a selectable Induction Type. (*Note that it is important to select the correct induction type when entering new potential members. For more information on induction levels, please contact the Central Office*)
  - Each of these types will be entered into the system just as traditional members and will be sent the email to complete the MDP
  - Since the Chapter Honoree is usually unaware of this honor, it is recommended that the email address be entered as ‘unknown’. This way, he/she will not be sent the notification to complete the MDP
  - When either the Chapter Honoree or 2<sup>nd</sup> Recognition induction types is added to the OOS system, an email is generated to the BGS staff to check original induction information for 2<sup>nd</sup> Recognition students, or to notify that a Plaque be ordered for the Chapter Honoree
- Also new to the system is the Honorary Membership, offered to those Chapter Advisors that don’t otherwise qualify for BGS Membership. This induction type can only be entered by a member of the BGS Staff (*For more information on this induction type, please contact the BGS Central Office*)
- There is an option, Option 1 (*default*), to enter the members one at a time as before
- Additionally, there is an Option 2, to upload members, which can be selected by checking the box next to ‘Show Option 2: Upload list of new members’

- When this option is selected, a new section appears with a gray background
- For uploading new members, please see the next red-bulleted section

## ■ Uploading Qualifying Students/Faculty Names

### ■ Creating your list of invitees

- To allow for every user to be able to upload a list of eligible names, we used the Comma Delimited File format or '.csv' file.
- Additionally, in order for the induction type, i.e. Senior, Junior, Master, 2<sup>nd</sup> Recognition, Chapter Honoree, Honorary, and Baccalaureate (outside the US), to be consistent with Beta Gamma Sigma's internal coding, you will have to create a separate list and .csv file for each type
- To create your list, use Microsoft Excel or similar program to create the original list. Your columns should be in the following format:

First Name	Last Name	Email	Phone
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- Any additional columns of information will cause your list not to upload properly
- 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 File Type to CSV (Comma delimited) → Name your file and select the location of the file → Save**
- Then be sure to close the file before attempting to upload to the site


### ■ Uploading the List

- Under the 'Add Potential Members' section, make sure that Option 2 has been checked
- In the 'Select an Induction Type' dropdown box, choose whether you are uploading Juniors, Seniors, Masters, Doctoral, etc
- Click the 'Browse' button next to the 'Select a CSV file to upload' field
- Navigate to where you have saved your CSV file and select 'Open'
- If for any reason you have selected the wrong file, you can click the 'Clear' button and start over
- Once you have confirmed that you have the correct list for upload, click the 'Load Member List'
- You will see some activity on the screen as it goes through and processes the file, looking for errors and verifying the data
- Your data will then appear below in a table format for you to review and verify that the information is correct. If the information is correct, click the 'Commit Upload' button at the bottom
- Your potential member's information will be displayed in a similar format as before listing: 'Un-Paid Potential Members', 'Paid/Accepted Members', and 'Reconciled Members'

### ■ Marking New Members as 'Paid/Accepted'

- You should revisit the site and mark new members 'Paid/Accepted' every time you receive a payment, or group of payments, from new members, or an acceptance of a Doctoral student
  - Click the 'Manage Induction Ceremony' page of the site and select the appropriate induction date from the list
  - In the 'Un-Paid Potential Members' section you will find those that have accepted membership and mark them paid/accepted by checking the 'Mark Paid/Accepted' box for each member
  - After you have marked all new members as paid/accepted, select the 'Save Paid/Accepted' button at the bottom of that section
  - New member will now appear in the 'Paid/Accepted Members' section

### ■ Sorting and Filtering the Lists of Potential, Paid/Accepted, and Reconciled Members

- Once you have either uploaded your list of potential members or entered them one by one, you now have the ability to sort any of the three lists by any of the four fields of information that you originally supplied
- To do this, simply click the title of the column once to sort it A → Z, or click again to sort Z → A
- Depending on the size of your list, you may want to use the Filter function as a way to find a specific student
- At the top of every group is a **Filter List** option. If you click this button you will notice a field appear below each header allowing you to enter your search criteria
- Once you have entered your criteria, click the filter icon (  ) and a dropdown will appear giving you several options
- In order to turn off the filter and display all the information, simply delete anything inside the filter field and then click the **Filter List** button again
- These functions are available for all of the groups including Unpaid, Paid and Reconciled Members

### ■ Exporting Your List of Names

- You now have the ability to export any of the three lists using 1 of 4 different file formats: Excel Spreadsheet, Word Document, PDF Document, or CSV file

### ■ Editing Both an Unpaid and Paid Member

- Simply click the 'Edit' button at the end of the record that you would like to change and the information will appear above in the 'Add Member', Option 1 section
- Once the information has been changed or updated, simply click the 'Save Member' button and the edited information will return to where it was originally listed

## **Edit Personal Data**

- This page was designed to easily and quickly maintain the currently logged in user's information including:
  - ✓ Job Duties (i.e. Chapter Advisor, Secretary/Treasurer, etc.)
  - ✓ Prefix
  - ✓ First and Last Name
  - ✓ Title (i.e. Dean, Administrative Assistant, etc.)
  - ✓ Email Address
  - ✓ Phone Number
  - ✓ Complete Physical Address
  - ✓ Username and Password (*Password requires Confirmation*)
  - ✓ Checkbox should be checked if you update/change your Password
  - ✓ Security Question and Answer
  - ✓ Email Preference
  
- Click the 'Save Personal Data' if any of the information on this page is modified

## **Supply Order**

- This is the section of the site where you will order all of the invitation and chapter promotional materials needed for your chapter to invite potential members and hold your ceremony: banners, posters, graduation cords and stoles, as well as Replacement Certificates
- The first page of the Supply Order section of the site contains information about ordering your supplies and shipping of materials. At the bottom of this page is a button, 'Place Online Supply Order', that needs to be clicked in order to proceed to the actual order form
- The first step when entering the Supply Order Form is to select a shipping address and shipping method for your supplies. This information is important to assure delivery in a timely manner
- There is also a comments section on the right-hand side of the screen in order for you to enter any special requests or additional information necessary to process your order, i.e. a Purchase Order (PO) number
- Then scroll down the page, selecting the quantity of each of the items that your chapter requires. Note that the Total will automatically be calculated as items are added or removed from your order
- For Custom Banner printing, there is a section at the bottom, left-hand corner of the page for you to enter the personalized chapter information to be printed on your Banner. For more information on Banner printing, please visit [www.betagammasigma.org/bannerprinting.htm](http://www.betagammasigma.org/bannerprinting.htm)

- The bottom, right-hand section of the page is where you enter information for Replacement Certificates
  - Enter the number of Replacement Certificates needed and the total will automatically be calculated at the bottom of the order at 10 USD per replacement certificate
  - In the box, enter the information needed to reprint the certificate in the format provided
- When your order is ready, please click the 'Save and Send Supply Order' button at the bottom of the page (*Please click this button only once. Clicking multiple times will create duplicate orders*)
  - Upon submission of your order you will be sent a copy of the order via email, but only if you are selected to receive Chapter Emails (see the '[Manage Chapter Contacts](#)' or '[Edit Personal Data](#)' section of this manual)
  - Additionally, the function has been built into the site giving chapters the option to pay for their supply orders using a credit card or to be billed separately
  - The following Credit Cards are accepted by Beta Gamma Sigma:
    - ✓ MasterCard
    - ✓ Visa
    - ✓ Discover

*Note that **American Express** is not currently accepted by Beta Gamma Sigma*

## Re-Invite Process

In 2007, Beta Gamma Sigma implemented the re-invite process to allow a second chance for those invited to BGS, but did not originally accept membership. Each year, at the close of the academic year, BGS will send out a request to each chapter that has eligible/potential members who didn't accept membership explaining the re-invite program and how/when the invitations will be sent. This request is an opt-out program. If BGS doesn't receive an opt-out request, an email re-invitation will go out from the BGS Central Office to all previous year invitees from your chapter who have not yet accepted membership. It is for this reason that it is important for chapters to **add (and not remove) all eligible members to the OOS system**, not only those that have accepted membership. With this re-invite process, chapters have the ability to increase their acceptance rates by allowing these potential members another chance to accept membership into Beta Gamma Sigma.

At the suggestion of chapters, BGS built in the ability to customize the re-invite fee to accommodate local chapter fees. For example, if your chapter charges 85 USD for a new membership, the students that accept the re-invitation through the BGS Central Office can be charged 85 USD if you inform our staff in advance to include that fee in the re-invite. If this option is chosen, the 65 USD membership fee will be paid to BGS and the remaining 20 USD will be credited to the chapter's account for each membership.

BGS also has the ability to exclude certain eligible/potential members from the re-invite process. Again, BGS will need to be made aware of these exclusions upon the chapter's reply to the re-invitation request email initially sent to the chapter.

For more information on, or questions regarding the re-invite process, please contact the BGS Central Office by phone at 314.432.5650, or send an email to [mwiedman@betagamma.org](mailto:mwiedman@betagamma.org), directed to Chapter Operations.

## Email Notifications

### Chapter Emails (Issued through the OOS System)

- Anyone that is a user of the site and is selected to receive emails from Beta Gamma Sigma will receive the following emails:
  - ✓ Supply Order Form Confirmation – copy of the supply order sent to BGS Central Office
  - ✓ Notification of Approved MDP Forms – sent upon reconciliation of an MDP and a paid member from your chapter
  - ✓ Credit Card Confirmation – if you pay for your chapter supplies with a credit card online

### Member Emails

- The following emails are sent to new members upon being marked paid in the system and completion of their online Membership Data Profile (MDP) form, respectively:
  - ✓ Congratulatory Message – this email contains the link to the online MDP form and is sent once the new member is marked paid
  - ✓ Welcome Message – this email contains their member number and other information pertaining to the Society and is sent after completion of their MDP

### Important Note Regarding Emails to Chapter Contacts and New Members

In certain cases, it appears that some of the school spam filters may be filtering out these messages. PLEASE - contact the school's IT department and ask that they add the BGS email domain "bgschapterservices.org" so that these messages are received. You should also encourage new members to check their own spam filters to make sure that the email message is not being filtered out.

## Completing the Online Membership Data Profile (MDP) Form

After a potential member has been added to the system, marked paid/accepted and saved, an email notification is sent to the email address that was originally entered for that person. That email notification contains one of the following links to the online MDP form, <http://tinyurl.com/2aycrxc> or <https://www.bgschapterservices.org/UI/member/memberintro.aspx>, along with some brief instructions on how to retrieve and complete the form. It is important for this MDP to be completed prior to the ceremony to ensure delivery of the new member's certificate and new member materials. Reminders are sent by a member of the BGS staff notifying chapter contacts, prior to the ceremony, that there are still remaining members who have not yet completed their MDP. Chapters are encouraged to complete MDPs on their members' behalf, for those that fail to do so prior to the ceremony, to ensure that each new member be presented with a certificate at the chapter's induction ceremony. If an MDP has yet to be completed 13 days after the date of the ceremony, a BGS staff member will complete a "generic" MDP with minimal information to assure that the member's name appears on the certificate order 14 days after the ceremony date. This is done so that all new members can receive a certificate in a timely manner and so that chapters can be properly billed by BGS.

Beta Gamma Sigma has built in a failsafe method for assuring that only those that are paid members can complete an MDP and be reconciled by a BGS staff member. Once a new member follows the link in the email notification they are required to select the geographic location of their residence – to ensure that they fill out the proper MDP, and geographic location of their chapter – to ensure that their chapter is listed. After the member has selected these two criteria, a list of only paid members appears, allowing them to click on their name and complete their MDP. If their name is not listed, they are urged to contact their chapter representative and find out why. If someone clicks on a name that is not theirs, a staff member will catch this during the reconciling process and the MDP form will be removed and the original person's record will be reset in order to allow them the opportunity to complete their form.

A field has been added to the MDP to assure that the name on the certificate is **EXACTLY** as the new member would like it to appear. It is important to note that this field is completed thoroughly and accurately. For example, if the name is entered in **ALL CAPITAL LETTERS, has a title (i.e. Mr. or Mrs.), missing punctuation, etc**, that is how it will appear on the certificate. This information is conveyed to new members in the email message they receive asking them to complete the online MDP.

## Batch Membership Order Shipping Schedule

The following is a breakdown of the 3 UPS zones used to ship materials inside the U.S. from the BGS Central Office. With the Central Office located in the Central Midwest, this information is based on the number of days for standard shipping through UPS. With roughly 60% of our chapters located in Zone 1, it requires fewer days for shipping, resulting in batch membership orders generated closer to the induction date.

### Zone 1. 2 or Less Days

- a. 1<sup>st</sup> Order received 10 days prior to the ceremony date
- b. 2<sup>nd</sup> Order received and shipped 5 days prior to the ceremony date
- c. 3<sup>rd</sup>/Final Order received and shipped 14 days after the ceremony date

### Zone 2. 3 Days

- a. 1<sup>st</sup> Order received 12 days prior to ceremony date
- b. 2<sup>nd</sup> Order received and shipped 6 days prior to the ceremony date
- c. 3<sup>rd</sup>/Final Order received and shipped 14 days after the ceremony date

### Zone 3. 4+ Days

- a. 1<sup>st</sup> Order received 14 days prior to ceremony date
- b. 2<sup>nd</sup> Order received and shipped 8 days prior to the ceremony date
- c. 3<sup>rd</sup>/Final Order received and shipped 14 days after the ceremony date

Shipping for Chapters Outside the U.S. will remain as follows:

#### 1. Canada

- a. 1<sup>st</sup> Order received 15 days prior to ceremony date
- b. 2<sup>nd</sup> Order received and shipped 10 days prior to the ceremony date
- c. 3<sup>rd</sup>/Final Order received and shipped 14 days after the ceremony date

#### 2. Outside the US & Canada

- a. 1<sup>st</sup> Order received 20 days prior to ceremony date
- b. 2<sup>nd</sup> Order received and shipped 15 days prior to the ceremony date
- c. 3<sup>rd</sup>/Final Order received and shipped 14 days after the ceremony date

## Chapter Fees and Pricing

The following is a list of Fees applicable to BGS by its Chapters, and the various induction types.

### **Membership Fees**

Lifetime Membership Fee.....	65 USD
2 <sup>nd</sup> Recognition (Masters or Doctoral) Certificate.....	10 USD
Doctoral Membership Fee.....	Fee Waived
Chapter Honoree.....	85 USD
Replacement Certificate.....	10 USD

### **Shipping & Handling Fees**

Effective July 1, 2010, Beta Gamma Sigma began charging chapters a shipping and handling fee. To keep the process as simple as possible, thus alleviating separate and additional invoices specifically for standard shipping costs, chapters will be charged an additional 2 USD per membership which will cover shipping and handling for all membership and supply orders during the year. The only additional shipping fees charged will be actual charges for expedited deliveries (overnight, 2nd day or 3 day select).

The shipping and handling fee will appear on the chapter's invoice accompanying each membership order. FOR EXAMPLE, when XYZ University is invoiced for their first membership order of the year (20 new members), the invoice will also include a 2 USD (\$2.00) charge per membership.

- 20 memberships x 65 USD (\$65) = 1,300 USD (\$1,300);
- plus 40 USD (\$40) shipping and handling (2 USD x 20 memberships);
- for a total charge of 1,340 USD (\$1,340).

*Please contact the Central Office if you need further clarification on this policy.*

## Frequently Asked Questions

### Section 1 – BGS Online Ordering System

**Q: Where do I find the supply order form? I can't find it on your website.**

A: Go to <https://www.bgschapterservices.org> and select the 'Supply Order' tab at the top of the page.

**Q: When I click the 'Add/Edit Shipping/Billing Address' button, nothing happens. How do I add or edit my address?**

A: A built-in Windows pop-up blocker (on your personal computer) may keep the 'Add/Edit Shipping/Billing Address' window from opening. When you click the button and the screen refreshes, simply click the button a second time and the new window will open. (Note: If the window still doesn't open, please make sure that any additional pop-up blockers are temporarily disabled.)

**Q: What do I do if I don't have email addresses for students when I am entering them into the system as eligible members?**

A: Since the email is a required field, you will need to enter an address into this field. It is strongly recommended that you locate the students' email addresses and enter them, as this is how we communicate information to the student (i.e. the link to the online MDP and the congratulatory email). If, however, you are unable to find an address for them, you can enter 'unknown' into the email field. **Do Not** use your own email address or you will begin receiving multiple copies of every broadcast email sent to BGS members.

**Q: Do I have to enter all the names one by one, or can I import them from my list?**

A: You now have the option of entering names one by one or uploading a CSV file. For help on creating a CSV file, please refer to the 'Uploading Qualified Students/Faculty Names' section of this manual. If you have any questions about this procedure, please contact Donna Binek at [dbinek@betagammasigma.org](mailto:dbinek@betagammasigma.org).

**Q: Do I have to enter all the names at one time or can I add more names later?**

A: You do not have to enter all names on the same visit to the site. If you wish to add names to your eligible list at a later time, go back to <https://www.bgschapterservices.org> and click on the 'Manage Induction Ceremony' tab. Find the ceremony date in the list of existing dates to the right of the screen and select the 'Edit' function. You can then either upload more names or enter them one at a time.

**Q: Why did I not get a notification that you received my order?**

A: To receive chapter emails (automatic emails through the Online Ordering System), you must check the 'Email Settings' under the 'Edit Personal Data' tab. (Important Note: At least one chapter contact must be registered to receive these emails.)

**Q: I used to provide hard-copy invitations to eligible students. What do we do now?**

A: You will still provide printed invitation materials to eligible students inviting them to join Beta Gamma Sigma. These materials are now ordered through the Online Ordering System, under the 'Supply Order' tab.

**Q: I would prefer to invite (contact) students face-to-face – by tapping or other invitation method. I would prefer not to add to their already busy schedules with more emails from BGS.**

A: You will still be making the same invitation (contact) with eligible students. The only contacts they get from the system are: 1) the email asking them to complete the online Membership Data Profile (MDP) form once they have paid their membership fee to the chapter, and 2) a congratulatory email after completion of the MDP, which provides their membership number and registration instructions for the Online Directory (which new members have been receiving previously as well).

**Q: I can't find the MDP in the invitation packet.**

A: The MDP is now part of the Online Ordering System, set up to make it easier and quicker to get members eligible for member benefits. Chapters should forward one of the following links to the MDP – <https://www.bgschapterservices.org/UI/member/memberintro.aspx> or <http://tinyurl.com/2aycxc> - to new members **after they have paid their membership fee and been marked paid in the system.** Each member will also receive the link automatically through the system if the chapter entered the student's email address correctly when they input the list of names. However, some emails are blocked, which is why we ask that you supply the new member with one of the above links.

**Q: When do I give the MDP link to the students?**

A: After the new member has paid the membership fee. It is also emailed to each student automatically after the chapter marks the member as 'Paid/Accepted' in the system – if the chapter included the student's correct email address when they input the list of names.

**Q: What is the link for the MDP?**

A: <https://www.bgschapterservices.org/UI/member/memberintro.aspx>

**Q: How do I know who has not filled out the MDP?**

A: On a regular basis, chapter representatives are asked to check the 'Manage Induction Ceremony' section at [www.bgschapterservices.org](http://www.bgschapterservices.org). There you can see a list of potential members who have not

yet paid, as well as a list of new members who have paid but have not yet filled out the online MDP. You are asked to remind them to do this, as they will not be able to take advantage of all BGS member benefits until the MDP has been filled out completely and accurately. The completion of the MDP also “triggers” the creation of the membership certificate.

**Q: Do I need to send a list of names to receive the membership certificates and pins?**

A: No, we will generate the list of those to receive membership certificates through the system. When a new member fills out the online MDP they will be added to the list of those to receive a certificate.

**Q: Do chapters have to pay for memberships before the certificates are shipped?**

A: No, BGS will ship membership certificates before receiving payment for the membership fees from the chapter.

**Q: Can I use a credit card to pay for membership fees?**

A: No. The Central Office will bill the chapter for the total amount equal to all memberships (65 USD times the number of new members, 10 USD for 2<sup>nd</sup> Recognitions, plus 2 USD shipping & handling per new membership). The chapter total must be paid by chapter or college/university check.

**Q: What is the difference between ‘Paid/Accepted’ members and ‘Reconciled’ members on the site?**

A: The chapter marks the members as ‘Paid/Accepted’ when they pay the membership fee to the chapter, or accept free of charge at the Doctoral level. The Central Office marks members as ‘Reconciled’ when they have filled out the online MDP and it is matched with a paid member.

**Q: Can I delete a member that I already marked as ‘Paid/Accepted’?**

A: No, if you need to delete a member from the Paid list you must contact the Central Office. The Central Office can delete a Paid member if circumstances warrant.

**Q: When do I pay BGS for my newly accepted members?**

A: BGS will bill the chapter for all new memberships as has been in the past on a bi-weekly or monthly basis.

**Q: If a new member pays the membership fee but does not fill out the online MDP, will he/she still receive a certificate and pin?**

A: The new member will not receive a certificate and pin at the induction ceremony because the completion of the MDP “triggers” the creation of the certificate. Otherwise, the certificate will be created two (2) weeks following the ceremony date when the MDP is filled out by the chapter or the Central Office.

**Q: If the MDP is completed after my second order has shipped, and it is still before my ceremony, can we still receive certificates in time for presentation at the ceremony?**

A: That would only be possible if you personally contact Donna Binek at [dbinek@betagamma sigma.org](mailto:dbinek@betagamma sigma.org) and the chapter agrees to pay expedited shipping charges.

**Q: We (the chapter) used to use the MDP for our own information purposes also, so can I get paper copies?**

A: Upon request, the Central Office provides a database of new members to the chapter, so a paper copy of the MDP is unnecessary.

## **Section 2 – Other FAQ's**

**Q: What is the lifetime membership fee?**

A: Beta Gamma Sigma has set the lifetime membership fee at 65 USD. Some chapters charge an additional chapter fee, which is collected at the same time as the membership fee. (For example, a chapter may charge 75 USD -- 65 USD forwarded to BGS and 10 USD that stays with the chapter.)

**Q: Do Doctoral Students have to pay the lifetime membership fee?**

A: No. There is no lifetime membership fee for a Doctoral Student to accept membership. They should be entered into the OOS site with all other induction levels. (Chapters may choose to charge a local fee, but BGS hopes that you do not)

**Q: Who should order supplies and memberships from the Central Office?**

A: Any chapter officer or designated chapter representative may order chapter supplies or process the chapter's online order. Chapters should update Chapter Contact information for every chapter officer/contact whenever there is new information.

**Q: What are the Shipping & Handling charges?**

A: Rather than invoice the chapter multiple times for various shipments of supplies and memberships, we are now charging 2 USD per new membership which will cover all chapter order shipping fees at standard rates. Actual Expedited Shipping charges (when requested by the chapter) will still be charged at actual costs.

## OOS Contact Information

### **Collegiate Chapter Operations**

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**Donna Binek**, Associate, Collegiate Chapters  
[dbinek@betagamma.org](mailto:dbinek@betagamma.org)

**Mary Wiedman**, Associate, Meetings/Collegiate Chapters  
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**Jean Tucker**, Associate, Meetings/Alumni & Collegiate Chapters  
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### **Online Ordering System (OOS) Technical Assistance**

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**Sean Dietz**, Database Administrator  
[sdietz@betagamma.org](mailto:sdietz@betagamma.org)

### **Accounting/Billing**

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**Inge Olson**, Associate, Accounts  
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