

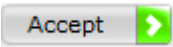


## Organization QuickStart

Welcome to OrgSync, a way for your organization to communicate, keep members updated, and enhance the membership experience. Using **privilege based access**; OrgSync provides all the tools that you need to manage your organization.

If your organization has not been created, follow these steps. If it has, then skip down to the dotted line for setup instructions

### Register your organization

- Go to [https://www.orgsync.com/welcome/get\\_orgsync](https://www.orgsync.com/welcome/get_orgsync)
- Review the Master Subscription Agreement
- Click the  button when ready.

### Create Your Organization and Member Account

- Your Community:** Select your community from the drop-down list.  
*If your school or community is not listed, contact us and we'll set it up for you!*
- Your Org's Full Name:** We need your organization's name & chapter.
- Abbreviation:** Give us a short name for your organization, if possible.
- Community Group:** How would you classify your organization?
- Your organization's password:** For a member to join the website, they will need to know the organization password.

#### Your Organization

First, we need some information about the organization you'd like to set up with OrgSync. If your School or Community is not listed, contact us and we'll set it up for you!

Your Community \*

Please Select a Community

Your Organization's Full Name \*

An Abbreviation for your Org's name \* (e.g. AMA)

Community Group \*

Business School Organizations

Your organization's password\* \*

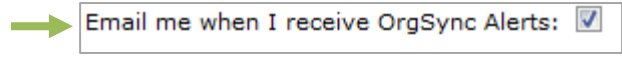
Please confirm the password \*

*\*Users will need this password in order to register with your organization.*

(Member Account)

- Create your Username and Password, as well as the other required information. This information will be used to create your profile.

This option will notify you when a member has joined the site, sent you a message, or made a purchase.



- Hit  when finished

## Login to *Your* Portal

- Login with your username and password
- This is your User Portal
- Your profile info, as well as any meetings, events, news, or alerts will be displayed in this Portal.

*For more information about the User Profile, please see the 'User Quick Start'.*

## Set up Your *Organization's* Portal



Click your organization's name on the left navigation bar

You will be taken to your organization's portal

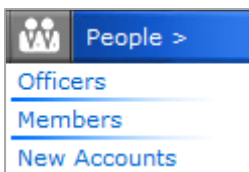
Menu bar help on the last page!

From this portal you can quickly view upcoming meetings & events, participate in polls and discussion posts, see the latest organization news and post information.



### Step 1: Set up Account Groups

- Account groups allow you to classify your members by their membership status
- A new portal has 4 default groups:







**Officers**- the officers of your organization

**Members**- a 'catch-all' account for all current members

**New Accounts**- those awaiting confirmation of membership

**Administrator(s)** - Usually the president or webmaster who has unlimited portal control. The administrator gives website privileges to Officers, promotes New Accounts to Members, and oversees all website activity. *Under the People tab, 'Administrators' are not shown.*

Go to:  Settings → Account Groups →

Name	Size	
Administrators	1	<input type="button" value="Edit"/> 
Members	0	<input type="button" value="Edit"/> 
New Accounts	0	<input type="button" value="Edit"/> 
Officers	0	<input type="button" value="Edit"/> 

**C** Change the default group names or click 'New' to create a new account group

**Important:** You can re-name a default account group, **BUT DO NOT CHANGE IT'S FUNCTION!** (ie: don't change Members to Alumni)

### Step 2: Group Permissions

Go to:  Settings → Group Permissions →

This is a complete list of all of the modules that we offer. Not only can you decide which tools are turned on, but you can change what different account groups see when they log in. If you want a module to only be viewable to your officers and not members- this is where you can make that distinction.

### Step 3: Change the Banner

Go to:  Settings → Banner Graphic →

Change the image displayed at the top of every page. The graphic should be 764 pixels wide by 155 pixels in height and must be a .jpeg, .png, or .gif image.

### Step 4: Change the Group Password



Go to:  Settings → Organization Password →

This is the password that members have to know in order to join your organization.

### Step 5: 'New Accounts' to 'Members'




Go to:  People > → New Accounts →  Manage →  Options →

After someone joins your portal, they are put in 'New Accounts' until an administrator changes their account status. *In order to change their account status, view the members*

*status, view the members*  Options . From here you can decide what account group that user belongs in.

**Managed Modules**

<p><b>General Modules</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Calendar</li> <li><input type="checkbox"/> Discussion</li> <li><input type="checkbox"/> Store</li> <li><input type="checkbox"/> Contact Us (OS Sales Division)</li> <li><input type="checkbox"/> Custom Pages</li> <li><input type="checkbox"/> OrgWall</li> <li><input type="checkbox"/> Video Cameras</li> <li><input type="checkbox"/> Extranet</li> <li><input type="checkbox"/> Requests</li> </ul> <p><b>People Modules</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Officers</li> <li><input type="checkbox"/> Roster (Members)</li> <li><input type="checkbox"/> Families</li> <li><input type="checkbox"/> Committees</li> </ul> <p><b>Pics &amp; Files Modules</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Pictures</li> <li><input type="checkbox"/> Files</li> </ul>	<p><b>Tools Modules</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Events</li> <li><input type="checkbox"/> Meetings</li> <li><input type="checkbox"/> News</li> <li><input type="checkbox"/> Polls</li> <li><input type="checkbox"/> Contact Books</li> <li><input type="checkbox"/> Links</li> <li><input type="checkbox"/> To-do Lists</li> <li><input type="checkbox"/> Tutor List</li> <li><input type="checkbox"/> Timesheet</li> <li><input type="checkbox"/> Forms</li> </ul> <p><b>Treasury Modules</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Checkbooks</li> <li><input type="checkbox"/> Dues (Simple)</li> <li><input type="checkbox"/> Dues (Advanced)</li> <li><input type="checkbox"/> Funds</li> <li><input type="checkbox"/> Invoices</li> <li><input type="checkbox"/> OrgBank</li> </ul>
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Delete  List  Submit 

Allow the Member data creation privileges

...or remove them if they don't belong!

**User Options**

**Details:**

First Name: \*

Last Name: \*

Classification: \*

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**Account Group:**

Title / Notes:

Administrators:

Members:

New Accounts:

Officers:



## Step 6: Create Content

Your portal should now be set up! You should start creating Events, Meetings, News, and more! The success of the website depends on your Administrators and Officers activity. Regular logins and continuous updates will keep the information current and your organization on the same page! We wish you the best and want to offer our assistance whenever you need it.

## Support

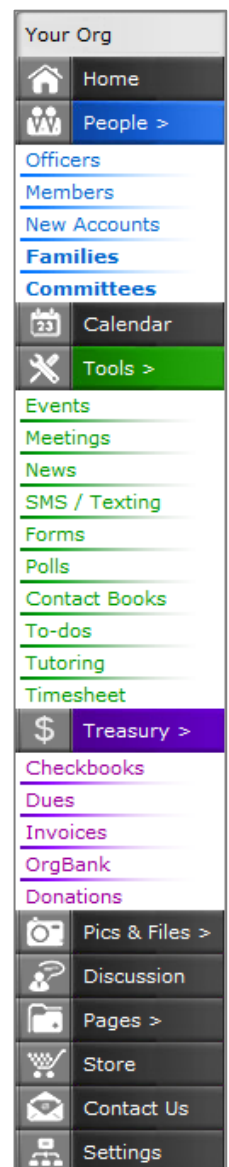
HelpDesk – (512) 238-8534

Email – [support@orgsync.com](mailto:support@orgsync.com)

AIM – OrgSync

### The menu bar is how you navigate throughout the portal

- Home:** Will bring you back to the organization's portal homepage
- People**
  - o Officers: A directory of the organization's officers
  - o Members: A directory of the organization's members
  - o New Accounts: Profiles awaiting membership confirmation
  - o Committees: Created groups within the portal
- Calendar:** A two month view of upcoming meetings & events
- Tools**
  - o Events: View/schedule events
  - o Meetings: View/schedule meetings
  - o News: View/post news
  - o Forms: View/create forms to capture user input
  - o Polls: Cast your vote in the latest poll
  - o Contact Books: Keep contact information (ex: vendors)
  - o To-dos: View/create/assign tasks
- Pics & Files**
  - o Pics: View/upload group photos
  - o Files: View/store group files
- Discussion:** Create or participate in discussion boards
- Pages:** This is a blank page document that can be used for newsletters, weekly updates, etc.
- Contact Us:** Submit feedback directly to the portal Administrator.
- Settings:** This is where portal administrators can change the group password, set up account groups, distribute website privilege & permissions, and more!





## Launch Guide

The following resources are intended to help you and your organization leaders as you begin using OrgSync for your organization(s). Our goal is provide you the necessary information to ensure a successful launch. If you require any additional assistance, please don't hesitate to contact our HelpDesk at 512.238.8534 or [helpdesk@orgsync.com](mailto:helpdesk@orgsync.com).

### Videos – [www.OrgSync.com/videos](http://www.OrgSync.com/videos)

- OrgSync Walkthrough – student leaders should watch this video to acclimate themselves with the many tools that OrgSync offers
- Umbrella Organization Walkthrough – this video is intended for university administrators who operate the umbrella portal

### Graphical Walkthrough – <http://issuu.com/orgsync/docs/walkthrough>

- All administrators and student leaders will benefit by having a copy of our graphical walkthrough. It's a great reference guide for our modules

### Training – [www.OrgSync.com/training](http://www.OrgSync.com/training)

- Organization training – student leaders are encouraged to signed up for a training session if they have any questions or would like to be shown how to use a particular section of the website
- Umbrella training – umbrella operators can attend training sessions to see how they can best utilize their portal to engage all the organizations on campus

**Buzz Generation** – publicity is crucial to making your students aware of OrgSync. The following have proven extremely effective in creating the mass awareness needed for rapid adoption:

- Campus newspaper
- University website
- Email newsletters
- Officer meeting announcements

**Administrator Club** – we encourage all our super users to join the Administrator Club located in the OrgSync community. Click Account>Join Another Org>OrgSync University>Administrator Club. The password is: **orgsyncvip**

**Be Active** – as an Administrator, you ultimately control utilization rates, adoption levels, and the overall users' experiences – be active and encourage involvement by making post, scheduling events, and keeping the campus up-to-date.