

WHAT IS MSO?

Membership Services Online (MSO) is a web based data management system specially designed to allow clubs to manage their club membership data online and also provides an administrative option for managing BMC club membership lists and payments.

The new system is quick and easy to use and should minimise the work that a club is required to do in order to renew its BMC membership and make the whole process more efficient.

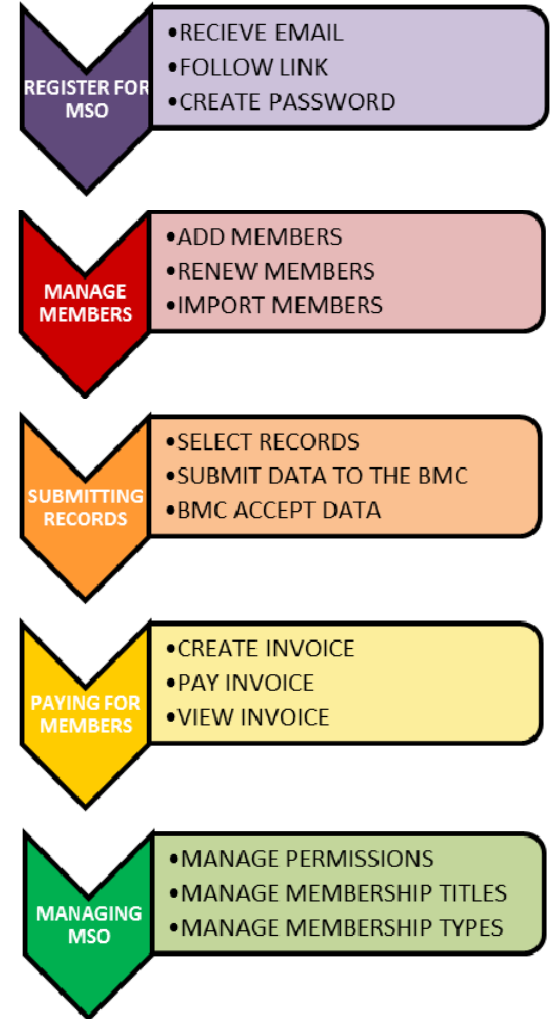
We have broken MSO down into the 5 steps shown on the right.

The first step will be to register, this you should only need to do the once but is useful information if you are inviting anyone else to help with your clubs data.

The next three steps are the most used steps: Manage Members, Submit Records and Pay/View Invoices. Each step will guide you through the process.

The final step is one you may or may not wish to use: Manage MSO. Where you will be able to customise and manage your clubs data.

There is also an 'at a glance page' so you know what to expect and a page explaining other features that you may want to use along with Contact Us details.



CONTENTS.

PAGE	CONTENT	PAGE	CONTENT
3.	REGISTER FOR MSO	12.	QUICK STEP GUIDE
4.	MANAGE MEMBERS & WHAT INFO IS NEEDED	13.	WHAT ELSE CAN I DO ON MSO?
5.	MEMBERSHIP TYPES & DECLARING YOUR MEMBERS	14.	MEMBERS PAGE AT A GLANCE
6.	ADD MEMBERS	15.	I NEED HELP!
7.	RENEW MEMBERS	15.	DATA PROTECTION
8.	IMPORT MEMBERS		
9.	SUBMITTING RECORDS		
10.	PAYING FOR MEMBERS		
11.	MANAGING MSO		

REGISTER FOR MSO

- RECIEVE EMAIL
- FOLLOW LINK
- CREATE PASSWORD

MANAGE MEMBERS

- ADD MEMBERS
- RENEW MEMBERS
- IMPORT MEMBERS

SUBMITTING RECORDS

- SELECT RECORDS
- SUBMIT DATA TO THE BMC
- BMC ACCEPT DATA

PAYING FOR MEMBERS

- CREATE INVOICE
- PAY INVOICE
- VIEW INVOICE

MANAGING MSO

- MANAGE PERMISSIONS
- MANAGE MEMBERSHIP TITLES
- MANAGE MEMBERSHIP TYPES

RECEIVE EMAIL

By now you should have received an email inviting you to register for MSO.

FOLLOW LINK

By following the web link in the email you will be able to create an account on MSO.

CREATE PASSWORD

Once you have followed the link it will ask you for your username (the email address that the link was sent to) and a password.

The password must be at least 7 characters long and contain at least one capital letter, one number and one special character, eg. !"£\$%^&*()<>?@#~[{}]=+

Once you have logged in you will see MSOs homepage, it is a good idea to bookmark this on your computer so you can easily find it again.

REGISTER FOR MSO

- RECIEVE EMAIL
- FOLLOW LINK
- CREATE PASSWORD

MANAGE MEMBERS

- ADD MEMBERS
- RENEW MEMBERS
- IMPORT MEMBERS

SUBMITTING RECORDS

- SELECT RECORDS
- SUBMIT DATA TO THE BMC
- BMC ACCEPT DATA

PAYING FOR MEMBERS

- CREATE INVOICE
- PAY INVOICE
- VIEW INVOICE

MANAGING MSO

- MANAGE PERMISSIONS
- MANAGE MEMBERSHIP TITLES
- MANAGE MEMBERSHIP TYPES

MANAGE MEMBERS

WHAT INFO IS NEEDED?

There are three ways of adding members to your organisation.

1. **ADD** members manually one by one. If you only have a few members, or a new member joining the club this may be the best option.
2. **RENEW** members from a previous year. If most or all of your members are renewing from the previous year this may be the best option.
3. **IMPORT** members allows you to import data from a spreadsheet. Ideal if you have a large amount of data and an up to date spreadsheet with all your member details.

* Members CANNOT be deleted once they have been submitted and accepted by the BMC. Once a member has been paid for they MUST remain on the list for the remained of the year. This is necessary in order to be compliant for organisation liability insurance.

*please note, if you are having any difficulties with any of these please do not struggle alone, contact us at the office for help and advice (see last page for contact details).

So what information does the BMC need?

The mandatory fields required are: Forename, Surname, DOB, Address including the Town and Postcode, and the Membership Type if they are to be submitted to the BMC. Dates of birth help stop duplicate records. Members without a postcode will not be sent a membership card or Summit magazine as they cannot be submitted.

If a member has sadly passed away you will need to change the Membership Status to deceased.

Any other information entered is for the clubs benefit.

REGISTER FOR MSO

- RECIEVE EMAIL
- FOLLOW LINK
- CREATE PASSWORD

MANAGE MEMBERS

- ADD MEMBERS
- RENEW MEMBERS
- IMPORT MEMBERS

SUBMITTING RECORDS

- SELECT RECORDS
- SUBMIT DATA TO THE BMC
- BMC ACCEPT DATA

PAYING FOR MEMBERS

- CREATE INVOICE
- PAY INVOICE
- VIEW INVOICE

MANAGING MSO

- MANAGE PERMISSIONS
- MANAGE MEMBERSHIP TITLES
- MANAGE MEMBERSHIP TYPES

MEMBERSHIP TYPES

DECLARING YOUR MEMBERS

ADULT/INDIVIDUAL

A club member that is over 18, not a student and pays the full rate.

STUDENT

A club member that is a full time student.

U18

A club member that is under the age of 18.

PROSPECTIVE

A new member that hasn't yet joined the club and is deciding. They can be a prospective member for up to 3 months, after this they either need to join as a club member, or leave.

UNDER 11 (FAMILY)

A club member that is under the age of 11, must have a parent, grandparent, or legal guardian within the club as a full club member. There is no fee associated with under 11 members but combined liability insurance is valid so long as their details are on MSO

You must declare ALL your members in order to be covered by BMC third party liability insurance. A consideration to take into account is the potential insurance liability in the event of a claim arising.

Civil liability insurance covers the club and its members. A prospective member will be insured whilst engaging in an organisations activities, for a maximum period of three months. The club must keep a record of this individual. After the three month trial period the individual must either join the club and pay the relevant fee, or leave the club.

REGISTER FOR MSO

- RECIEVE EMAIL
- FOLLOW LINK
- CREATE PASSWORD

MANAGE MEMBERS

- ADD MEMBERS
- RENEW MEMBERS
- IMPORT MEMBERS

SUBMITTING RECORDS

- SELECT RECORDS
- SUBMIT DATA TO THE BMC
- BMC ACCEPT DATA

PAYING FOR MEMBERS

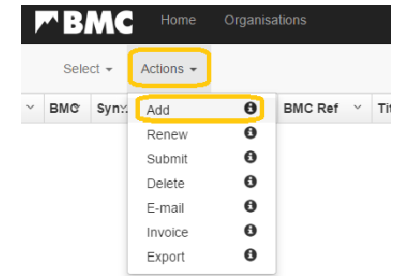
- CREATE INVOICE
- PAY INVOICE
- VIEW INVOICE

MANAGING MSO

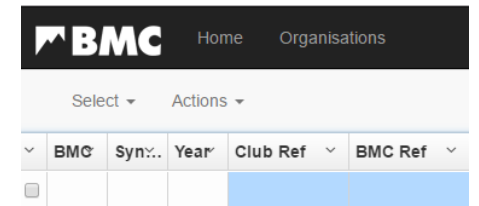
- MANAGE PERMISSIONS
- MANAGE MEMBERSHIP TITLES
- MANAGE MEMBERSHIP TYPES

1. ADD MEMBERS

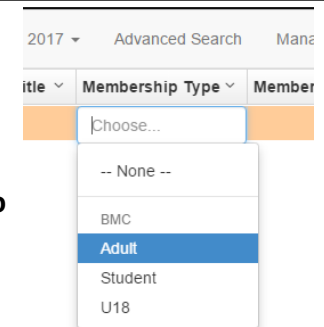
1. To ADD members go to ACTIONS—ADD. Search first to check that they are not already on the database to avoid making duplicates.



2. A new row will appear on the spreadsheet. You can then fill in the data. The mandatory fields are: FORE-NAMES, SURNAME, DOB, ADDRESS and MEMBERSHIP TYPE.

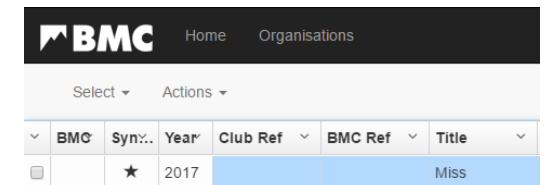


3. To add the membership type double click in the cell and select from the appropriate option: ADULT/STUDENT/U18/PROSPECTIVE/ UNDER 11 (FAMILY). *see page 5 for details on membership types.



***If you have overseas members you do not need to submit them to the BMC, therefore you do not need to select a membership type.**

4. When the membership type has been selected the record shows a ★.



REGISTER FOR MSO

- RECIEVE EMAIL
- FOLLOW LINK
- CREATE PASSWORD

MANAGE MEMBERS

- ADD MEMBERS
- RENEW MEMBERS
- IMPORT MEMBERS

SUBMITTING RECORDS

- SELECT RECORDS
- SUBMIT DATA TO THE BMC
- BMC ACCEPT DATA

PAYING FOR MEMBERS

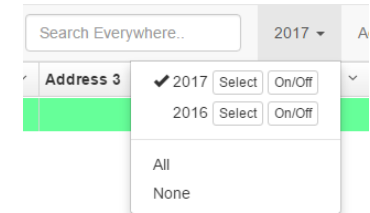
- CREATE INVOICE
- PAY INVOICE
- VIEW INVOICE

MANAGING MSO

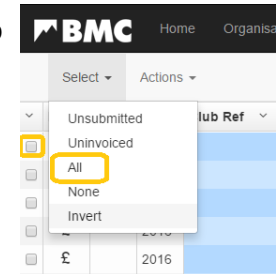
- MANAGE PERMISSIONS
- MANAGE MEMBERSHIP TITLES
- MANAGE MEMBERSHIP TYPES

2. RENEW MEMBERS

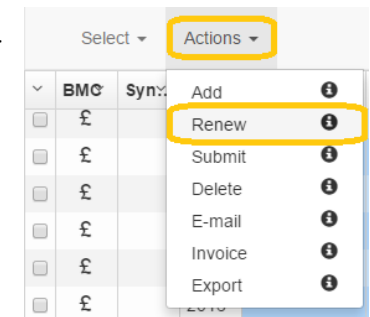
1. To RENEW members from a previous year go to your current year drop box and select the previous year.



2. select the records you want. You can do this using the tick boxes or go to SELECT—ALL.



3. Once you have selected the required records go to ACTIONS—RENEW.



4. Your chosen records will now be in your current years data. It is a good idea to check that members have the correct membership type assigned to them before going to the next step.

Select	BMC	Syn..	Year	Club Ref	BMC Ref	Title	Forenam
<input type="checkbox"/>		★	2017			Miss	Beryl
<input type="checkbox"/>			2017		R303444	Mr	Jerry

REGISTER FOR MSO

- RECIEVE EMAIL
- FOLLOW LINK
- CREATE PASSWORD

MANAGE MEMBERS

- ADD MEMBERS
- RENEW MEMBERS
- IMPORT MEMBERS

SUBMITTING RECORDS

- SELECT RECORDS
- SUBMIT DATA TO THE BMC
- BMC ACCEPT DATA

PAYING FOR MEMBERS

- CREATE INVOICE
- PAY INVOICE
- VIEW INVOICE

MANAGING MSO

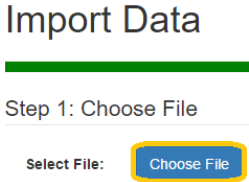
- MANAGE PERMISSIONS
- MANAGE MEMBERSHIP TITLES
- MANAGE MEMBERSHIP TYPES

3. IMPORT MEMBERS

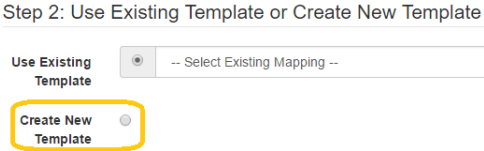
1. To IMPORT your members from a spreadsheet go to HOME—MANAGE ORGANISATIONS and select IMPORT from your club.



2. Once you have selected IMPORT you will be taken to step 1 where you will CHOOSE FILE. Choose your file from the correct location.

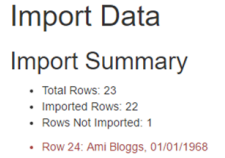


3. Once you have chosen your file you will go to step 2, here select CREATE NEW TEMPLATE. Once you have selected this make sure you have the correct MAP TO MSO COLUMN matched to YOUR COLUMN, you can also IGNORE fields.



4. PREVIEW IMPORT step 3 shows what will be imported. If you are happy you can go ahead and IMPORT RECORDS.

5. The next screen will show an IMPORT SUMMARY—total rows imported and not imported, these will need to be added manually (ADD MEMBERS).



REGISTER FOR MSO

- RECIEVE EMAIL
- FOLLOW LINK
- CREATE PASSWORD

MANAGE MEMBERS

- ADD MEMBERS
- RENEW MEMBERS
- IMPORT MEMBERS

SUBMITTING RECORDS

- SELECT RECORDS
- SUBMIT DATA TO THE BMC
- BMC ACCEPT DATA

PAYING FOR MEMBERS

- CREATE INVOICE
- PAY INVOICE
- VIEW INVOICE

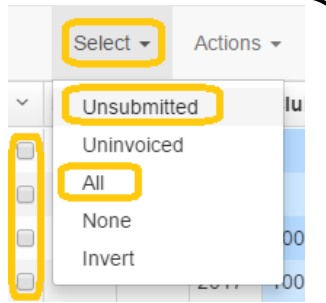
MANAGING MSO

- MANAGE PERMISSIONS
- MANAGE MEMBERSHIP TITLES
- MANAGE MEMBERSHIP TYPES

SELECT RECORDS

To select the records you would like to submit to the BMC you can:

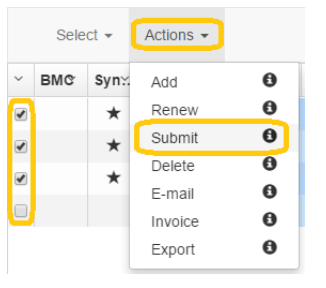
- Use the tick boxes to the left of the entry.
- Go to SELECT and chose ALL (selects all records) or UNSUBMITTED (selects only records that haven't yet been submitted to the BMC).



SUBMIT DATA TO BMC

To SUBMIT the chosen data go to ACTIONS—SUBMIT.

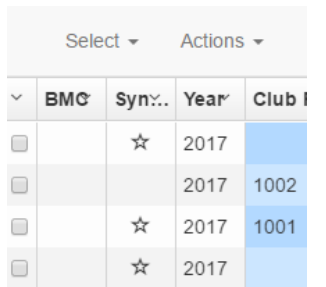
*NOTE only members with a membership type and a ☆ will be able to be submitted.



BMC ACCEPT DATA

Data that has been submitted will show a ☆ this means it is waiting for the BMC to accept the data.

Once accepted the stars will disappear and a £ will appear.



KEY TO SYMBOLS

Member details need to be submitted to the BMC	=	★
Member details have been submitted to the BMC and are waiting to be accepted	=	☆
Member has been submitted and accepted by the BMC and now needs to be paid for	=	£
Member has been paid for, everything is complete	=	✓
Member details have been updated: update needs to be submitted to the BMC	=	✓ ★
Both columns are empty: member does not have a membership type to be submitted	=	

REGISTER FOR MSO

- RECIEVE EMAIL
- FOLLOW LINK
- CREATE PASSWORD

MANAGE MEMBERS

- ADD MEMBERS
- RENEW MEMBERS
- IMPORT MEMBERS

SUBMITTING RECORDS

- SELECT RECORDS
- SUBMIT DATA TO THE BMC
- BMC ACCEPT DATA

PAYING FOR MEMBERS

- CREATE INVOICE
- PAY INVOICE
- VIEW INVOICE

MANAGING MSO

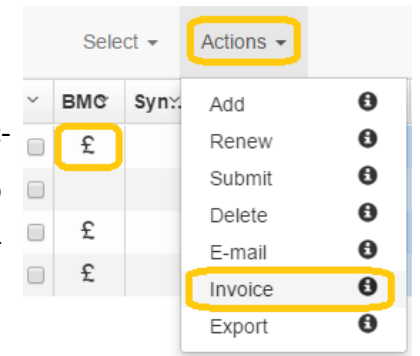
- MANAGE PERMISSIONS
- MANAGE MEMBERSHIP TITLES
- MANAGE MEMBERSHIP TYPES

CREATE INVOICE

PAY INVOICE

VIEW INVOICE

You can only produce an invoice for the records that have been submitted to the BMC. To create your invoice go to **ACTIONS—INVOICE**. This will produce an invoice for all records with a **£** symbol in the BMC column. It will ask you to confirm this step telling you the number or records included.

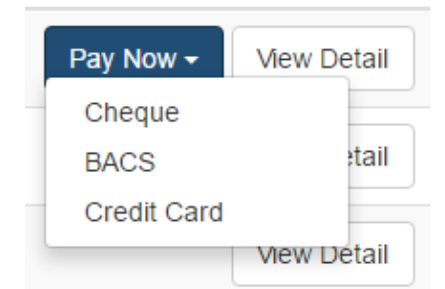


To pay your invoice you can follow the directions on screen or go to **HOME—MANAGE ORGANISATIONS—MANAGE—VIEW ORDERS**. When you select **PAY NOW** you will be provided with three payment options:

CHEQUE: gives you a reference number to put on the cheque.

BACS: will give you bank details to make payment to.

CREDIT CARD: takes you to a secure payment page.



To view your orders you can follow the **GO TO ORDERS** link from creating your invoice, or, follow the following sequence: **HOME—MANAGE ORGANISATIONS—MANAGE—VIEW ORDERS**. This will show your most recent order first, along with all previous orders, dates, values, and if they have or haven't been paid.

Orders

Date Raised	Order Detail	Value	Payment Type	Payment Status	Payment Date	
27/04/2017	BMC Club Membership	£265.00		Pending		Pay Now View Detail
26/02/2016	BMC Club Membership	£424.00	BACS	Success	26/02/2016	View Detail
27/03/2015	BMC Club Membership	£384.25	BACS	Success	27/03/2015	View Detail
03/04/2014	BMC Club Additional Members	£58.75	BACS	Success	03/04/2014	View Detail
03/04/2014	BMC Club	£235.00	Cash	Success	03/04/2014	View Detail
07/03/2013	BMC Club Additional Members	£47.00	Cheque	Success	07/03/2013	View Detail
07/03/2013	BMC Club	£235.00	Cheque	Success	07/03/2013	View Detail
01/03/2012	BMC Club	£235.00	Cheque	Success	01/03/2012	View Detail
01/03/2012	BMC Club Additional Members	£29.40	Cheque	Success	01/03/2012	View Detail
20/12/2010	BMC Club Additional Members	£47.00	Cash	Success	20/12/2010	View Detail

REGISTER FOR MSO

- RECIEVE EMAIL
- FOLLOW LINK
- CREATE PASSWORD

MANAGE MEMBERS

- ADD MEMBERS
- RENEW MEMBERS
- IMPORT MEMBERS

SUBMITTING RECORDS

- SELECT RECORDS
- SUBMIT DATA TO THE BMC
- BMC ACCEPT DATA

PAYING FOR MEMBERS

- CREATE INVOICE
- PAY INVOICE
- VIEW INVOICE

MANAGING MSO

- MANAGE PERMISSIONS
- MANAGE MEMBERSHIP TITLES
- MANAGE MEMBERSHIP TYPES

MANAGE PERMISSIONS

MANAGE PERMISSIONS allows you to add or remove users and set permissions of MSO.

- **ADD USER:** select ADD USER. Enter their email address. Select the permissions you wish them to have. Select SAVE. The new user will receive an email inviting them to register.
- **REMOVE A USER:** select REMOVE USER of the user you wish to remove access to MSO.
- **EDIT PERMISSIONS:** to alter the permissions a user has select USER PERMISSIONS and deselect/select the relevant permissions.

MANAGE TITLES

MANAGE MEMBERSHIP TITLES allows you to define and manage your own membership titles, and link these to the BMC titles if you wish.

- **ADD NEW CUSTOM TITLE:** select ADD TITLE and enter your own title, eg. Secretary. From the BMC TITLE dropdown box select NONE. Select SAVE.
- **REPLACE AN UNASSIGNED BMC TITLE:** Select CREATE OWN TITLE, enter your title in TITLE, check that the BMC TITLE you want to replace is correct. Select SAVE. This will replace the BMC title.

MANAGE TYPES

MANAGE MEMBERSHIP TYPES allows you to define and manage your own membership types, and link these to BMC types.

- **ADD NEW CUSTOM TYPE:** select ADD MEMBERSHIP TYPE, enter the new membership type eg. Overseas. If your custom type is not a BMC membership then select NONE. Select SAVE.
- **REPLACE AN ASSIGNED BMC TITLE:** select CREATE OWN TITLE, enter your appropriate type eg. Full Member, make sure that this is associated with the correct BMC types for invoicing (BMC TYPE), select SAVE.

QUICK STEP GUIDE...

1. ADD MEMBERS

IMPORT / RENEW / ADD MEMBERS

Add members via one of the three options.

Make sure there is an address—need first line, and postcode or town. A student union address or club address is fine.

An email address is useful for contacting the member.

3. SUBMIT DATA

SUBMIT DATA.

Go to ACTIONS—SUBMIT. Then wait for the symbol to change from a star to £ sign.

This may take a couple of days depending on how many need accepting.

2. ADD MEMBERSHIP TYPE

ADD A MEMBERSHIP TYPE.

From the orange column headed MEMBERSHIP TYPE select the type of membership for each member

4. CREATE AN INVOICE

CREATE AN INVOICE

Once the data has been accepted by the BMC you can generate an invoice.

To generate an invoice go to ACTIONS—INVOICE.

WHAT ELSE CAN I DO ON MSO?

CUSTOMISE & ADD FIELDS

If you select **MANAGE COLUMNS** you can choose whether you would like to view all the columns, or just a selection. To hide columns un-tick the relevant box, or to hide an entire section select **OFF**.

The **CUSTOM** fields are available to add your own data that is not required by the BMC, eg. medical information, emergency contacts, if they want mailings etc. Just type your heading into the boxes and again use the tick boxes to select which you wish to view.

The screenshot shows the 'Manage Columns' interface with five sections: Personal, Address, Contact, Membership, and Custom. Each section has an 'On' or 'Off' toggle. The Personal section has checkboxes for Club Ref, BMC Ref, Title, Forenames, Surname, and Dob. The Address section has checkboxes for Address 1, Address 2, Address 3, Town, County, and Postcode. The Contact section has checkboxes for Email, Home Tel., and Mobile Tel. The Membership section has checkboxes for Membership Title, Membership Type, and Member Status. The Custom section has checkboxes for Column 1 through Column 8, Date 9, and Date 10.

SEARCH FIELDS

There are two search options: **SEARCH EVERYWHERE** and **ADVANCED SEARCH**.

- **SEARCH EVERYWHERE** type in the data that you would like to find and it searches the whole spreadsheet.
- **ADVANCED SEARCH** here you can choose a specific column to search, or use the **+** sign to add an additional search criteria.

The screenshot shows the search interface with a 'Search Everywhere..' input field and a dropdown menu. The dropdown menu is open, showing a list of search criteria: Everywhere, Club Ref, BMC Ref, Title, Forenames, Surname, Dob, Address 1, Address 2, Address 3, Town, County, Postcode, Email, Home Tel, Mobile Tel, Membership Title, Membership Type, Member Status, and Column 1. The table below shows member data with columns for Address 3, Town, County, and Postcode.

Address 3	Town	County	Postcode
	Manchester		M20 2BB
	Manchester		M20 2BB
	Hamilton		M20 2BB
	Manchester		M20 2BB
	Manchester		M20 *bb
	Manchester		M20 2BB
			m20 2bb

EMAIL MEMBERS

You can email all your members, or a selection. First select who you would like to email: **SELECT—ALL** or use tick boxes or you can use the **SEARCH** or **ADVANCED SEARCH** functions.

When you have chosen who you want to email go to **ACTIONS—EMAIL**. This will open your default email provider. Email addresses will be populated in the **BCC** (other email addresses will not be seen by members).

Only those with a valid email address will be emailed.

The screenshot shows the BMC interface with the 'Actions' menu open. The 'E-mail' option is highlighted. A tooltip message says: 'This action will open your mail client to send an e-mail to the selected members.' The table below shows member data with columns for Address 3, Town, County, and Postcode.

Address 3	Town	County	Postcode
	Manchester		M20 2BB
	Manchester		M20 2BB
	Hamilton		M20 2BB
	Manchester		M20 2BB
	Manchester		M20 *bb
	Manchester		M20 2BB
			m20 2bb

MEMBERS PAGE AT A GLANCE

The screenshot shows the BMC Members Page interface. At the top, there is a navigation bar with the BMC logo (1), 'Home' (2), and 'Organisations' (3) links. On the right side of the navigation bar, there are links for 'Profile' (4), 'Logout' (5), and 'Help' (6). Below the navigation bar, there is a search bar (9) and a dropdown menu for the current year (10), set to '2017'. The main content area is a table with columns for BMC, Sync, Year, Club Ref, BMC Ref, Title, Forenames, Surname, Dob, Address 1, Address 2, Address 3, Town, and an empty column (11). The table contains four rows of member data. The first row has a star icon in the Sync column (7) and a checkmark in the empty column (12). Below the table, there is a summary bar showing 'Total Records: 4 To Submit: 3 To Invoice: 0' (13).

BMC	Sync	Year	Club Ref	BMC Ref	Title	Forenames	Surname	Dob	Address 1	Address 2	Address 3	Town	
	★				Miss	Beryl	Burton	12/05/1939	Halton			Leeds	
				R303444	Mr	Jerry	Wigglesworth	10/06/1960	Long Tree			Manchester	M20 2BB
	★	2017	1001		Mr	Donald	Duck	19/04/1991	Walt	Disney		Manchester	M20 2DD
		2017	1002		Mrs	Ella	Cinder	10/02/1989	1 Road House	Fairy Lane	Talesend	Manchester	M20 9FT

1. **BMC LOGO** takes you to home page.
2. **HOME** takes you to MSO home page.
3. **ORGANISATIONS** takes you to import/export/manage/members page.
4. **PROFILE** here you can change your password.
5. **LOGOUT** logs you out of MSO.
6. **HELP** allows you to download a support guide or email/phone for support.
7. **BMC column** lets you know if you need to raise an invoice £ or if everything is complete ✓.
8. **SYNC column** tells you if you need to submit data: ★, data has been submitted: ☆, or data has been accepted (blank).
9. **SEARCH EVERYWHERE** search all fields.
10. **2017** current year displayed, can select previous years data.
11. **ADVANCED SEARCH** search specific fields.
12. **MANAGE COLUMNS** view/hide specific columns.
13. **TOTAL RECORDS** number of entries on MSO.
14. **TO SUBMIT** entries that can be submitted to the BMC.
15. **TO INVOICE** accepted entries that an invoice can be raised for.

I NEED HELP!

Once you have completed registration you can log in and view your organisation here:

<https://mso.thebmc.co.uk/Account/Login>

If you have not received an invite to register or are having trouble logging in or using MSO please contact betty@thebmc.co.uk or clonagh@thebmc.co.uk on 0161 445 6111

DATA PROTECTION

The BMC complies with the Data Protection Act 1998 and assures affiliated organisations of strict care and control of all data submitted to us. Member information and other data submitted to the BMC by organisations is used only for the distribution of Summit magazine and communication with your organisation members. Organisation members lists are not made available to any commercial organisations or individuals.