

# MANUAL FOR YOUR ORGANISATION

Membership Services Online (MSO) is a web based data management system, for BMC Members and Affiliated Clubs.

There are two sections to MSO.

The first section is called 'My Profile' and has information about the Individual Member, allowing members to view and update their own details.

The second is 'Your Orgs' and allows organisations to view, update and manage information about their organisation and their members.

## MY PROFILE

Individuals members can access and edit the following information:

1. Personal membership status
2. BMC Membership Card
3. Travel and Activity Insurance information
4. Preferences

## YOUR ORGS

Organisations can manage the following information:

1. Add and submit member data
2. Create invoices and pay for annual membership fees
3. Edit members contact details
4. Email their members

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# REGISTER FOR MSO

## RECEIVE REGISTRATION EMAIL

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

If you have not received this please email [office@thebmc.co.uk](mailto:office@thebmc.co.uk) or phone the office on 0161 445 6111.

## FOLLOW THE 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.

# IMPORTANT INFORMATION

## DECLARING YOUR MEMBERS

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.

## MANDATORY FIELDS & DECEASED MEMBERS

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.

## MEMBERSHIP TYPES

**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.

**UNEMPLOYED** - A member who is claiming unemployment benefits.

**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.

# ACCESSING 'Your Organisation'

## OVERVIEW

### There are two sections in MSO

#### My Profile

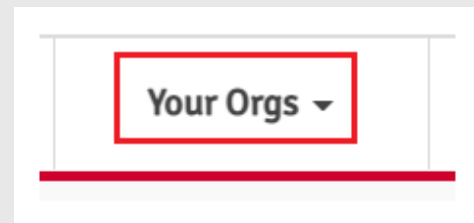
This is a new feature designed to show individuals the information we hold for them and their preferences.

#### My Orgs

This is where you will manage your club data, including submitting to the BMC and creating invoices.

## ACCESSING 'YOUR ORG'

Click on the 'Your Org' button on the top right hand side of the home screen to access your club management tool.



## YOUR ORGANISATION - EDIT DETAILS

The BMC can hold one organisation address and one email address for the Main Club Contact.

We also hold a meeting address. This will ensure that the club is shown in the correct area on the online Club List and Find a Club map.

To Update click on 'Edit Details'.

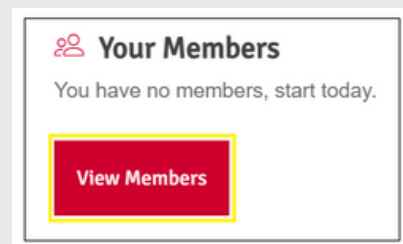
Your Organisation		
910163 Arun Mountaineering Club		
<b>Email Address</b>	<b>Organisation Address</b>	<b>Meeting Address</b>
	177-179 Burton Rd Didsbury m20 2BB Manchester United Kingdom	176-177 Burton Road test Didsbury M20 2GF Manchester United Kingdom
<a href="#">Edit Details</a>		

# ACCESSING 'Your Members'

## ACCESSING 'YOUR MEMBERS' FOR UPDATES

Click on the 'View Members' button. This will take you to the membership page for the current year.

**You are now ready to add members**



## THE THREE WAYS TO ADD MEMBERS

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.

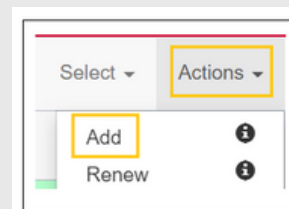
\* Members **CANNOT** be deleted once they have been submitted and accepted by the BMC. Once a member has been paid for they **MUST** remain on the list for the remainder of the year. This is necessary in order to be compliant for organisation liability insurance.

\*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).

# YOUR MEMBERS

## ADDING MEMBERS MANUALLY

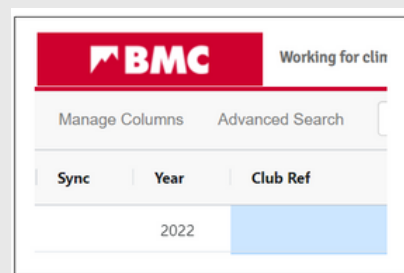
1. To ADD members go to ACTIONS—ADD.  
Search first to check that they are not already on the database to avoid making duplicates.



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

\*DOB is not mandatory, but it is required in order for your members to access their personal profile.

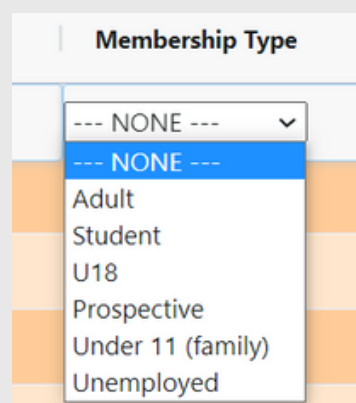
\*If you include an email address your members will be included in the mailing of the monthly newsletter.



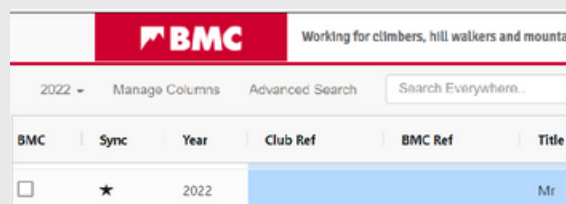
3. To add the membership type scroll to the right to the orange section. Double click in the cell and select from the appropriate option: ADULT/STUDENT/U18/PROSPECTIVE/ UNEMPLOYED/UNDER 11 (FAMILY).

\*see page 4 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.

\*Prospective members will not be submitted.



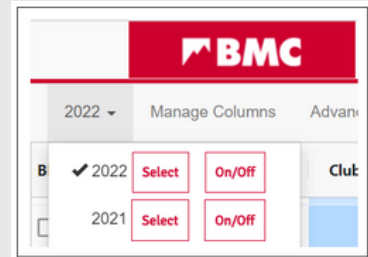
14. When the membership type has been selected the record shows a black star.



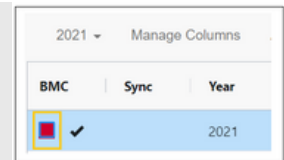
# YOUR MEMBERS

## RENEW MEMBERS FROM PREVIOUS YEAR(S)

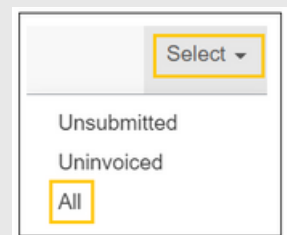
1. To RENEW members from a previous year go to your current year drop box and the select button for year you wish to renew from.



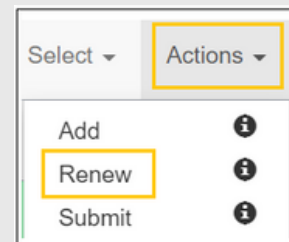
2a. You can either select the records you want to renew by ticking the box in the first column.



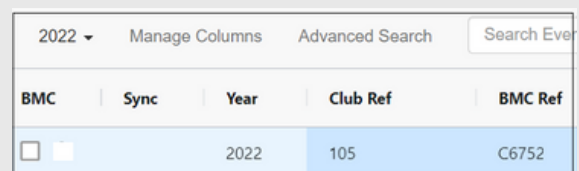
2b. Or you can SELECT-ALL.



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



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



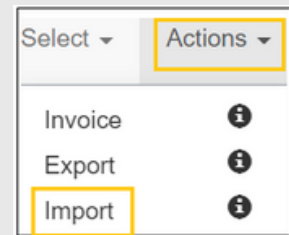
BMC	Sync	Year	Club Ref	BMC Ref
<input type="checkbox"/>	<input type="checkbox"/>	2022	105	C6752



# YOUR MEMBERS

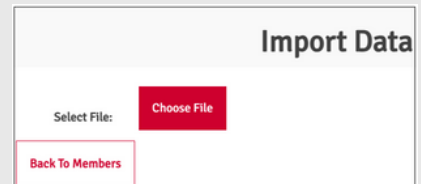
## IMPORT MEMBERS FROM SPREADSHEET

1. To IMPORT your members from a spreadsheet go to 'ACTIONS' and 'IMPORT'.

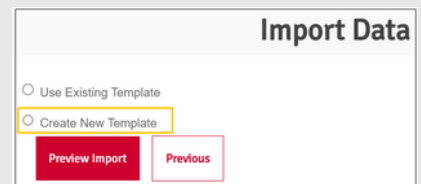


2. A new window will open. Click on 'Choose File'.

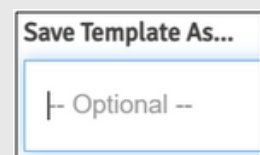
Choose your spreadsheet.



3. Click on Create New Template.



4. You can save this template to use next time. See further details on next page.



5. Once you have chosen your data you will need to map your column headings to the headings in MSO. You can choose to ignore headings if you don't use them. Once you are happy click on

'Preview Data'

Preview Import

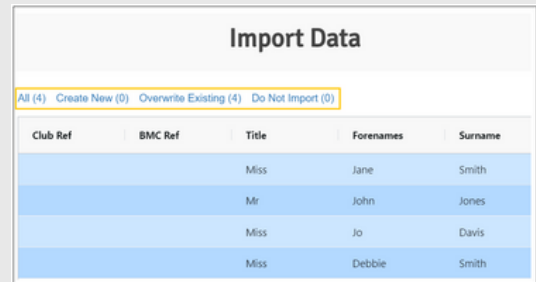
Your Column	Your First Row	Map To MSO Column
Year	2022	-- Ignore --
Club Ref		-- Ignore -- Id OrganisationId MembershipTypeName ContactTypeName MemberStatusName Club Ref BMC Ref
BMC Ref	D12345	

# YOUR MEMBERS

## IMPORT MEMBERS FROM SPREADSHEET

6. You will then see a preview of your data. There are 4 headings.

1. All
2. Create new - the member will show in here when they are not yet in the current year.
3. Overwrite existing - the member will show in here when they have previously been submitted into current year.
4. Do Not Import - When there is an issue with the record.



Club Ref	BMC Ref	Title	Forenames	Surname
		Miss	Jane	Smith
		Mr	John	Jones
		Miss	Jo	Davis
		Miss	Debbie	Smith

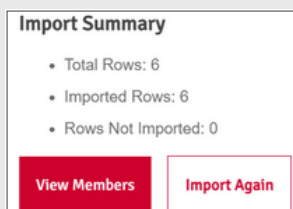
The records may show as red if MSO has picked up a difference from the previous data in the current year. You will still be able to import if you are happy with any changes to be made

7. Once you are happy with our preview click on 'Import records'.

Import Records

Previous

8. You will then see a summary of the import. This will tell you if any records have not been imported. These can then be done manually if necessary.



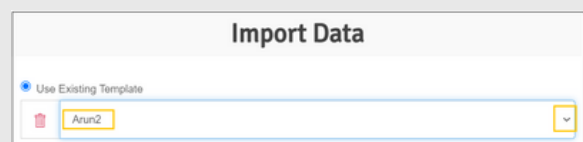
Import Summary
• Total Rows: 6
• Imported Rows: 6
• Rows Not Imported: 0

View Members    Import Again

## IMPORT MEMBERS FROM SPREADSHEET - Existing Template

If you have previously saved a template you can go Straight to 'Use an Existing Template'.

Templates can be deleted using the bin symbol if no longer used.



Import Data

Use Existing Template

Anun2

# SUBMITTING RECORDS

## KEY OF SYMBOLS TO BE AWARE OF BEFORE SUBMITTING



A black star shows that your records are ready to submit to the BMC.



A hollow star shows that the member has been submitted and is waiting BMC approval.



A £ symbol shows that the member has been approved by the BMC and is ready to create an invoice.



A tick shows that an invoice has been created.



A tick & a black star shows that data has been updated and needs submitting.

**\* If both columns are empty please check to see if Membership Type needs adding**

\* Please note that member data won't submit if a membership type has not been allocated.

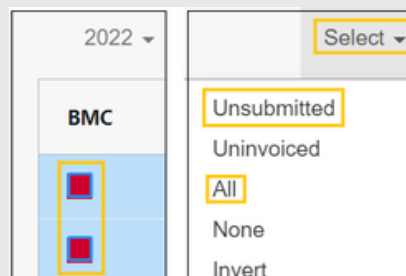
\* Prospective members and under 11 members cannot be submitted, so even if a membership type has been allocated no black star will appear.

Once a prospective member has finished the three month prospective period their membership type needs to be changed to they can be submitted and paid for.

## SELECTING RECORDS PRIOR TO SUBMISSION

To select the records you would like to submit to the BMC you can: Use the tick boxes to the left of the entry.

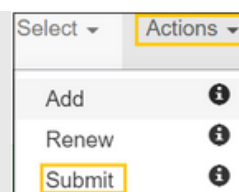
Go to SELECT and chose ALL (selects all records) or UNSUBMITTED (selects only records that haven't yet been submitted to the BMC).



## SUBMITTING YOUR DATA TO THE BMC

To SUBMIT the chosen data go to ACTIONS –SUBMIT.

The black star will then change to showed a hollow star.

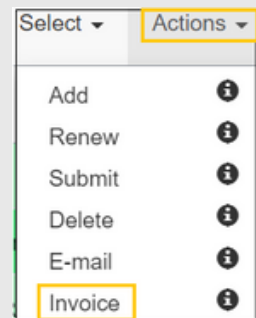


# PAYING FOR MEMBERS

## CREATE INVOICE

You can only produce an invoice for the records that have been submitted to the BMC and are showing a £ symbol.

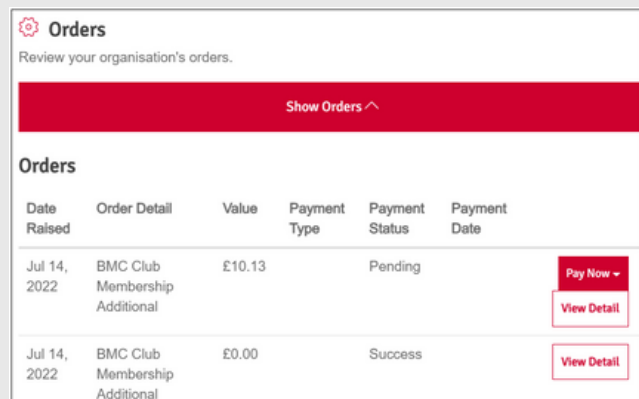
To create your invoice go to 'Actions' and 'Invoice'. This will produce an invoice for all records with a £ symbol in the BMC column. It will ask you to confirm this step telling you the number or records included.



## VIEW INVOICES

To view your invoice go to 'Your Org'  
Go to the bottom of the page to 'Your Orders' and click on 'Show 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.



A screenshot of the 'Orders' page. The page title is 'Orders' and the subtitle is 'Review your organisation's orders.' There is a red bar with the text 'Show Orders ^'. Below this is a table of orders.

Date Raised	Order Detail	Value	Payment Type	Payment Status	Payment Date
Jul 14, 2022	BMC Club Membership Additional	£10.13		Pending	<a href="#">Pay Now</a> <a href="#">View Detail</a>
Jul 14, 2022	BMC Club Membership Additional	£0.00		Success	<a href="#">View Detail</a>

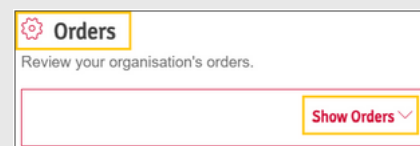
## PAY INVOICE

To pay your invoice go to 'Your Org'.  
Go to the bottom of the page to 'Your Orders' and click on 'Show 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.



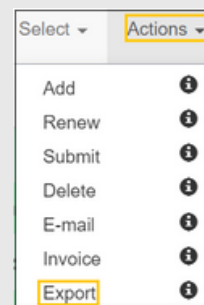
# EXPORTING MEMBERS

## EXPORTING MEMBERS USING SELECTED RECORDS

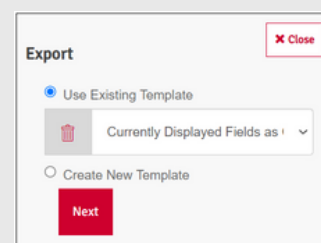
You can export selected records from 'Your Members' to a spreadsheet.

This can be selected records or all of a particular year.

Go to 'Actions' and then 'Export'.



This will open an 'EXPORT' tab at the left hand side of the page.



## EXPORT CREATING A NEW TEMPLATE

Click 'Create New Template'.

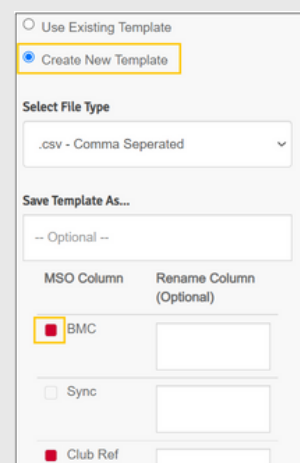
Select the file type you require.

you will have the option to 'Save Template As' to use again at a later date.

Tick the headings you require. Once ticked they will be red.

You are also able to change the name of the column headers. This is optional.

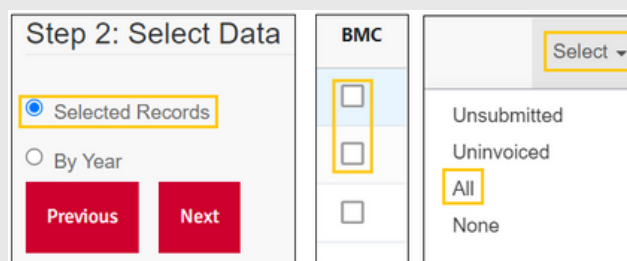
Click 'Next' once you have selected the headers.



Click on 'Selected Records'

You can either click tick box for specific individual records

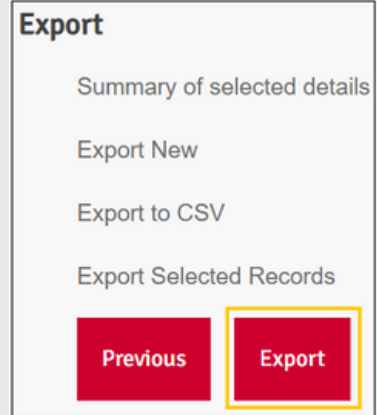
Or go to 'Select' and 'All'.



# EXPORTING MEMBERS – Continued

Click on 'Export'.

Or go back to 'Previous' if you wish to change or amend.



**Export**

Summary of selected details

Export New

Export to CSV

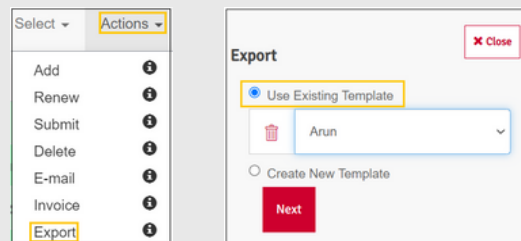
Export Selected Records

Previous Export

## EXPORT USING EXISTING TEMPLATE

Click on 'Actions' and 'Export'.

Then 'Use Existing Template'.



Select ▾ Actions ▾

- Add ⓘ
- Renew ⓘ
- Submit ⓘ
- Delete ⓘ
- E-mail ⓘ
- Invoice ⓘ
- Export ⓘ

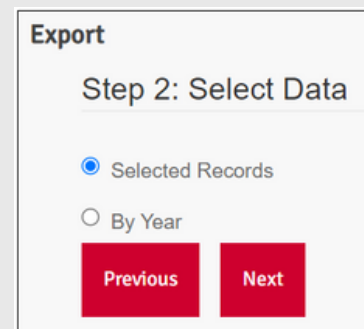
**Export** ✕ Close

Use Existing Template

Create New Template

Next

Follow instructions to either export by Selected Records/ALL or by year.



**Export**

**Step 2: Select Data**

Selected Records

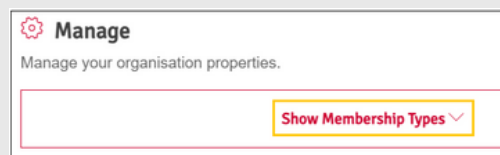
By Year

Previous Next

# CUSTOMISING MSO FIELDS

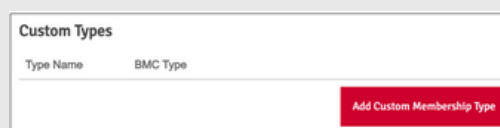
## CUSTOMISE MEMBERSHIP TYPES

MANAGE MEMBERSHIP TYPES allows you to define and manage your own membership types, and link to the standard BMC Types. Go to 'Your Org' and 'Manage'. Then 'Show Membership Types'.



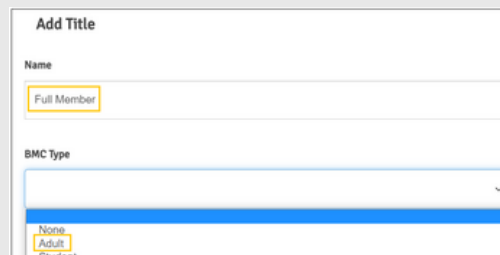
The screenshot shows a 'Manage' page with a gear icon and the text 'Manage your organisation properties.' Below this is a red-bordered box containing a yellow button labeled 'Show Membership Types' with a downward arrow.

Click on 'Add Custom Membership Type'.



The screenshot shows a table with two columns: 'Type Name' and 'BMC Type'. Below the table is a red button labeled 'Add Custom Membership Type'.

Type in your own title - see example of 'Full Member'.



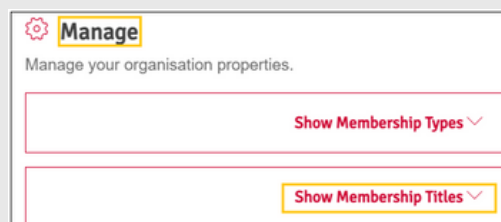
The screenshot shows an 'Add Title' form. The 'Name' field contains 'Full Member'. The 'BMC Type' dropdown menu is open, showing options: 'None', 'Adult', and 'Student'. 'Adult' is highlighted.

Select BMC type you would like it to link to. In this example 'Adult'.

Click on SAVE.

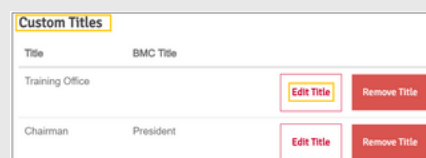
## CUSTOMISE MEMBERSHIP TITLES

MANAGE MEMBERSHIP TITLES allows you to define and manage your own membership types, and link to the standard BMC Titles. Go to 'Your Org' and 'Manage'. Then 'Show Membership Titles'.



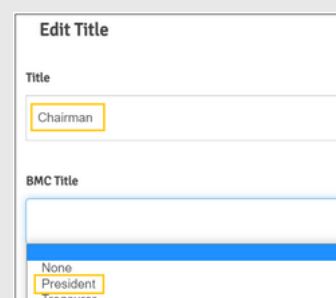
The screenshot shows a 'Manage' page with a gear icon and the text 'Manage your organisation properties.' Below this is a red-bordered box containing a yellow button labeled 'Show Membership Titles' with a downward arrow.

Click on 'Add Custom Membership Title'.



The screenshot shows a table with two columns: 'Title' and 'BMC Title'. The first row has 'Training Office' in the Title column and a red 'Remove Title' button in the BMC Title column. The second row has 'Chairman' in the Title column and a red 'Remove Title' button in the BMC Title column.

Type in your own title - see example of 'Chairman'.



The screenshot shows an 'Edit Title' form. The 'Title' field contains 'Chairman'. The 'BMC Title' dropdown menu is open, showing options: 'None', 'President', and 'Treasurer'. 'President' is highlighted.

Select BMC title you would like it to link to. In this example 'President'.

Click on SAVE.

# MANAGE PERMISSIONS

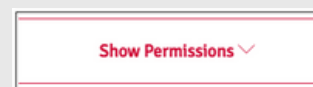
## MANAGE PERMISSIONS

You are able to add additional users to MSO. These can have up to three different levels of permission.

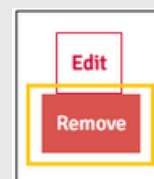
Select 'Show Permissions' and then 'Add User'.

Type in email address of new user. Then select the permissions you wish to give this user and press 'Save'.

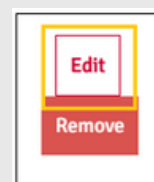
The new user will receive an email inviting them to register.

A white form titled "Add User". It contains an "E-Mail Address" field with a checkmark icon and the text "anu@thebmc.co.uk". Below this is a "Permissions" section with three radio button options: "View Members", "Edit Members", and "Manage Organisation". At the bottom are two red buttons: "Save" and "Cancel".

You can remove a user by clicking on 'Remove User'.



You can edit permission access for a user by clicking on 'Edit'.



## DATA PROTECTION

When adding new users on MSO it is important to make them aware of the data protection act.

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.



# MANAGE COLUMNS

## HIDE COLUMNS

When you are viewing or editing your data in the 'Your Members' section you can hide columns to make it easier to view

You can choose whether you would like to view all the columns, or just a selection. There are two ways to hide columns.

1. Tick the individual column you wish to hide or un-tick to see again.
2. Or to hide an entire section you can use the On and Off buttons.

2022 ▾ Manage Columns Advanced Se

Manage Columns ✕ Close

Personal On Off

- Club Ref
- BMC Ref
- Title
- Forenames
- Surname
- Dob

Address On Off

- Address 1
- Address 2
- Address 3

## ADD CUSTOM COLUMNS

In the 'Your Members' section there are 10 Custom fields available for your club to add data that is not required by the BMC, eg. medical information, emergency contacts, if they want mailings etc.

The last two are configured to enable you to add dates.

Just type your heading into the boxes and again use the tick boxes to select which you wish to view.

Year	Districts	mcc ↑	Date 9	Date 10
2022	North	Yes	1/1/2022	12/1/2022
2022	South	No	1/1/2020	12/1/2021
2022				

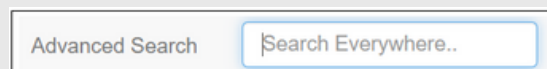
# What Else Can MSO Do?

## SEARCH FIELDS

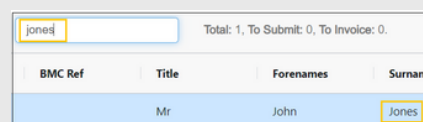
There are two search options: 'Search Everywhere' and 'Advanced Search'.

To 'Search Everywhere' type in the data that you would like to find and it searches the whole spreadsheet.

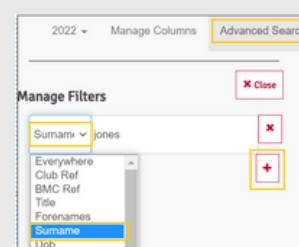
Click on 'Advanced Search' to specify a particular column to search, or use the + sign to add an additional search criteria.



Advanced Search Search Everywhere..



BMC Ref	Title	Forenames	Surname
	Mr	John	Jones



2022 Manage Columns Advanced Search

Manage Filters

Surname Jones

Everywhere  
Club Ref  
BMC Ref  
Title  
Forenames  
Surname  
Uob

## EMAIL MEMBERS

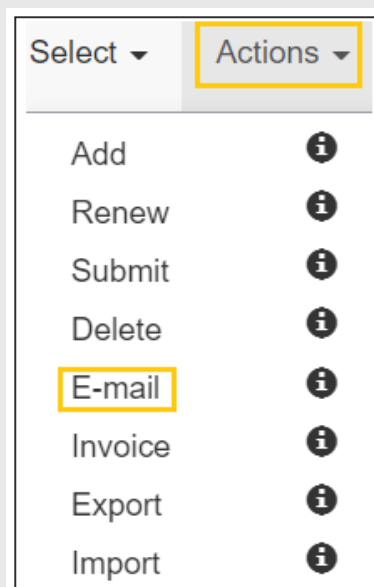
MSO gives you the option of emailing all your members, or a selection.

First select who you would like to email. There are 3 options:

1. 'Select' — 'All'
2. Use tick boxes
3. 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.



Select Actions

Add

Renew

Submit

Delete

E-mail

Invoice

Export

Import

## FINAL NOTE

Please don't struggle alone.

If you have not received an invite to register or are having trouble logging in or using MSO please contact [clonagh@thebmc.co.uk](mailto:clonagh@thebmc.co.uk) or [arun@thebmc.co.uk](mailto:arun@thebmc.co.uk). Alternatively call the BMC Office on 0161 445 6111.