Graphical Walkthrough
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Registering a New Account

OrgSync is a comprehensive set of online tools designed to optimize member management and promote & facilitate both member and leader involvement.

OrgSync is the easy-to-use, affordable solution that automates all aspects of organization management.

Click the pods below for to learn how OrgSync can benefit you!

Register with OrgSync
- User Registration - Sign up as a member of an existing OrgSync organization.
- Organization Registration - Create a new organization and become a part of the OrgSync family. Do not use this form to join an already existing organization.

Select the community and organization:
- Accounting Society (College Community)
- Finance Association (College Community)
- Fraternity Demo (Greek)
- Ski Club (College Community)
- Sorority Demo (Greek)
- Student Services (Administration)
Your Calendar

Your personal calendar will show events and meetings from all of your organizations.

Show and hide events from your organizations.

Tasks with due dates will also show on your calendar.

Click an event for a pop-up description.

Events turn blue when you sign up to attend them.

View past and future months.

OrgSync.
The Organization’s Portal

The organization portal shows what's going on in that organization.

Menu buttons with a “+” next to them will show more options.

The next meeting will always show here.

The OrgWall is a great place for informal group messages.

Discussion Posts

- Animal Shelter
  Wow! Megan, you are totally great. We have an event...
  — Jessica Seagle, 06:23PM
- Paid Back
  That sounds good. Thursday would work best for me...
  — Anika Seagle, 08:27PM
- Paid Back
  I'm definitely willing to go. I have a lot of comm...
  — Lindsey Jones, 06:23PM
Each organization can customize their menu by turning modules on and off.

Your organization can host its website on OrgSync.

Administrators can change permissions and site graphics.

You can switch to any of your organizations at any time.

Events

Download a workbook of each member's event participation.

Click here to view the Events module.

Organize events into categories.

View who's attending any event.

Click to create a new event.
Closing an Event

Meetings

Click here to view the Meetings module

View a grid of every member's attendance

Create a new meeting

View the details and attendance for any meeting

The timesheet automatically shows event participation

Adjust each member's participation when you Close an event

Submit this form will give each listed member the displayed number of hours on the Timesheet.
**Attendance Grid**

The grid shows each member's attendance at every meeting.

As well as the total number of meetings they have missed.

**News Posts**

Click here for the News module.

Click to post new news.

Receive news posts from parent organizations.

The phrase building is getting new computers! They will be installed, up and running, and available for use by July 20, 2007. Be sure to come check out the latest technology we're getting.

News available to: Administrators, Members, New Accounts, Officers.

**Reminder:**

Student Services Post

All organizations must complete the "Member Registration Form" by July 10th.

News available to: Everyone.
News Post Options

Forms

Database management with easily created forms for any members and non-members to complete.

Access your forms here.

View, evaluate, and download submissions.

Design forms using an easy form builder.
Form Options

Rich text editors allow for formatted descriptions

Limit when forms will be accepted

Forms support evaluation by committee

Limit which members may submit the form

Form Pages

Drag and drop to reorder pages

Click Design to use the form builder
Designing Form Pages

- Build forms using six different kinds of form elements!
- Drag and drop to reorder form fields
- Allow users to upload files in the form
- Edit and delete existing form elements
Form Element Options

Submitting Forms

Form Submissions

Members of the scoring committee can evaluate the forms

Submissions can be downloaded as PDFs or in Excel

Each user's form data is saved every time a page is submitted

Create new elements with titles and instructions
Deciding Submissions

Administrators can Accept or Defeer submissions based on the committee’s evaluation.

Publishing Your Decisions

Easily message members with Accepted or Deferred submissions.

Perform membership actions on users with Accepted submissions (convert Pledges to Members, auto-join members to a private event, etc.)
**Member Lists**

Click to view the member list

Multiple member lists

Search for members

Message any member

Extended profiles for every member

**List View Mode**

Members are grouped by classification

Send an email, an OrgSync message, or view each member’s profile

Administrators can set each member’s permission level
Re-Ordering the Officers List

Committees

Committee Options

Set the title and description of a committee, then add members in the ‘Manage’ screen.

OrgSync
## Managing Committee Members

<table>
<thead>
<tr>
<th>Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anderson, Ashley</td>
</tr>
<tr>
<td>Austin, Alex</td>
</tr>
<tr>
<td>Babson, Allison</td>
</tr>
<tr>
<td>Beard, Matt</td>
</tr>
<tr>
<td>Ball, Jennifer</td>
</tr>
<tr>
<td>Biler, Drew</td>
</tr>
<tr>
<td>Brown, Terry</td>
</tr>
<tr>
<td>Carmi, Susana</td>
</tr>
<tr>
<td>Carson, Caroline</td>
</tr>
<tr>
<td>Crawford, John</td>
</tr>
<tr>
<td>Crystal, Laura</td>
</tr>
<tr>
<td>Dickinson, Ryan</td>
</tr>
<tr>
<td>Donaldson, Dale</td>
</tr>
<tr>
<td>Franklin, Crystal</td>
</tr>
<tr>
<td>Franklin, Morgan</td>
</tr>
<tr>
<td>Griswold, Matthew</td>
</tr>
<tr>
<td>Harris, Alie</td>
</tr>
<tr>
<td>Harris, Jeremy</td>
</tr>
<tr>
<td>Herloek, Krissy</td>
</tr>
<tr>
<td>Jones, Lindsey</td>
</tr>
<tr>
<td>Jones, Riley</td>
</tr>
<tr>
<td>Lane, Sammy</td>
</tr>
<tr>
<td>Lau, Cindy</td>
</tr>
<tr>
<td>Lawson, Brooks</td>
</tr>
<tr>
<td>McCoy, Chris</td>
</tr>
<tr>
<td>Moore, John</td>
</tr>
<tr>
<td>Murri, Sam</td>
</tr>
<tr>
<td>Org SYNC, Danilo</td>
</tr>
<tr>
<td>Peck, Sydney</td>
</tr>
<tr>
<td>Penn, Debbie</td>
</tr>
<tr>
<td>Pickens, Rob</td>
</tr>
<tr>
<td>Kennes, Jonie</td>
</tr>
<tr>
<td>Ramsey, Jennifer</td>
</tr>
<tr>
<td>Rogers, Alie</td>
</tr>
<tr>
<td>Roosevelt, Terry</td>
</tr>
<tr>
<td>Sanders, Tara</td>
</tr>
<tr>
<td>Seagle, Jessica</td>
</tr>
<tr>
<td>Shih, Jeff</td>
</tr>
<tr>
<td>Smith, Molly</td>
</tr>
<tr>
<td>Sponger, Kyle</td>
</tr>
<tr>
<td>Sears, Megan</td>
</tr>
<tr>
<td>Stanley, Avery</td>
</tr>
<tr>
<td>Stratham, Gene</td>
</tr>
<tr>
<td>Talley, Amy</td>
</tr>
<tr>
<td>Thomas, Rachel</td>
</tr>
<tr>
<td>Torro, Rob</td>
</tr>
<tr>
<td>Trainal, Sherry</td>
</tr>
<tr>
<td>Walsky, Ryan</td>
</tr>
<tr>
<td>Wallace, Kent</td>
</tr>
<tr>
<td>Watts, Amanda</td>
</tr>
<tr>
<td>Whaley, Drew</td>
</tr>
<tr>
<td>Wilson, Eni</td>
</tr>
<tr>
<td>Wilson, Jamie</td>
</tr>
<tr>
<td>Zimmerman, Susan</td>
</tr>
</tbody>
</table>

### Rush Committee
- Crawford, John
- Crystal, Laura
- Donaldson, Dale
- Gershon, Matthew
- Harris, Alie
- Jones, Lindsey
- McCoy, Chris
- Pickens, Rob
- Tovilla, Shri

### Service Committee
- Beard, Matt
- Ball, Jennifer
- Carson, Caroline
- Crawford, John
- Gershon, Matthew
- Harris, Alie
- Jones, Lindsey
- McCoy, Chris
- Pickens, Rob
- Tovilla, Shri

### Social Committee
- Anderson, Ashley
- Babson, Allison
- Beard, Matt
- Ball, Jennifer
- Carson, Caroline
- Crawford, John
- Donaldson, Dale
- Griswold, Matthew
- Harris, Alie
- Jones, Lindsey
- McCoy, Chris
- Pickens, Rob
- Tovilla, Shri

### Organizational Sync (OrgSync)

Drag members into a committee below to add them to it.

Click and Drag

Show and hide committee

Easily remove committee members.
The Organization’s Calendar

The organization’s calendar only shows its own events and meetings.

Clicking an event or meeting will pop up a description.

Click here to jump to that event’s details.

Polls

Click to create new polls.

Results can be displayed after members vote, or after the poll closes.

Click here to view the Polls module.
Poll Options

<table>
<thead>
<tr>
<th>Poll Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name: Officer Elections</td>
<td></td>
</tr>
<tr>
<td>Begins at: 2007</td>
<td></td>
</tr>
<tr>
<td>Ends at: 2009</td>
<td></td>
</tr>
<tr>
<td>Poll Options:</td>
<td></td>
</tr>
<tr>
<td>Options</td>
<td></td>
</tr>
<tr>
<td>Option 1</td>
<td></td>
</tr>
<tr>
<td>Option 2</td>
<td></td>
</tr>
<tr>
<td>Option 3</td>
<td></td>
</tr>
<tr>
<td>Option 4</td>
<td></td>
</tr>
<tr>
<td>Option 5</td>
<td></td>
</tr>
<tr>
<td>Option 6</td>
<td></td>
</tr>
<tr>
<td>Option 7</td>
<td></td>
</tr>
<tr>
<td>Option 8</td>
<td></td>
</tr>
</tbody>
</table>

Poll will only accept votes cast between these two dates
Polls can accept multiple votes at once
Polls can be restricted to certain groups of members

You can hide the results until after the poll closes
After the first vote is cast, the poll's options cannot be changed
**Contact Books**

- Search for a contact across all contact books
- Organize your contacts into categories, companies, or regions

**Contact Book Options**

- You can create contact books for different groups of members

**Contact Book Entries**

- Contacts are organized by name and/or organization
Contact Book Entry Notes

Easily update contact information as it changes

Add notes to keep track of your relationship with the contact

Links

Share important websites with all members

Click here to view the Links module

OrgSync
To-do Lists

Tasks can have priorities

Blue tasks have been assigned to you

You can claim tasks

Click here to view the To-do lists

Editing a To-do List

Drag and drop tasks to change their order

Easily assign a task to any member

Task due dates are optional

Restrict which group members can view the to-do list

OrgSync
Tutoring

Tutoring Options

- List your tutoring availability
- View members offering to tutor in your organization
- View members offering to tutor in your school
- Message potential tutors with one click
- No pre-set subjects allows you to offer tutoring on any subject
- Offer to tutor only other members of the current organization, or anyone at your school
**Timesheet**

Timesheet Details

**Timesheet: Totals**

<table>
<thead>
<tr>
<th>Name</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anderson, Dale</td>
<td>33.6</td>
</tr>
<tr>
<td>Beard, Matt</td>
<td>53.0</td>
</tr>
<tr>
<td>Bly, Drew</td>
<td>74.5</td>
</tr>
<tr>
<td>Brown, Terry</td>
<td>63.0</td>
</tr>
<tr>
<td>Crawford, John</td>
<td>74.0</td>
</tr>
<tr>
<td>Donaldson, Dale</td>
<td>31.0</td>
</tr>
<tr>
<td>Greyson, Mathew</td>
<td>27.0</td>
</tr>
<tr>
<td>Harris, Jennifer</td>
<td>30.5</td>
</tr>
<tr>
<td>Jones, Riley</td>
<td>29.5</td>
</tr>
<tr>
<td>Mezan, Brooks</td>
<td>44.5</td>
</tr>
</tbody>
</table>

Click here to view the timesheet

Click Details to see a breakdown of the member's hours

**Timesheet: Dale Anderson**

**Approved Hours**

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 21, 2007</td>
<td>Volunteer Service</td>
<td>6.0</td>
</tr>
<tr>
<td>Jun 20, 2007</td>
<td>Community Service - Food Bank</td>
<td>5.0</td>
</tr>
</tbody>
</table>

**Event Hours**

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 23, 2007</td>
<td>Event: Aspen Trip</td>
<td>3.0</td>
</tr>
<tr>
<td>May 13, 2007</td>
<td>Event: Helping Society with their Tax</td>
<td>4.0</td>
</tr>
<tr>
<td>May 25, 2007</td>
<td>Event: Mid-Semester Bash</td>
<td>4.0</td>
</tr>
<tr>
<td>May 14, 2007</td>
<td>Event: Sunday Mass</td>
<td>1.0</td>
</tr>
<tr>
<td>May 25, 2007</td>
<td>Event: Funeral Benediction</td>
<td>1.5</td>
</tr>
<tr>
<td>May 25, 2007</td>
<td>Event: Choir Practice</td>
<td>1.5</td>
</tr>
<tr>
<td>May 26, 2007</td>
<td>Event: Food Bank</td>
<td>2.0</td>
</tr>
<tr>
<td>May 29, 2007</td>
<td>Event: Volleyball at Eastwood Park</td>
<td>2.0</td>
</tr>
<tr>
<td>Jun 18, 2007</td>
<td>Event: Music with Society</td>
<td>2.0</td>
</tr>
</tbody>
</table>

Total: 11.0

**Pending Hours**

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jul 11, 2007</td>
<td>Help at the Special Olympics (Requested by: Rachel Fpper)</td>
<td>4.0</td>
</tr>
</tbody>
</table>

Total: 4.0

Event hours are automatically pulled from event participation

Only approved and event hours are counted in the grand total

Any member can suggest hours for another

But only administrators can approve them
Requests

Requests allow organizations to interact with campus offices to reserve rooms, equipment, or funding.

Pending requests have not yet been approved or rejected.

Past requests will remain for documentation.

Shows the progress of a request.

Click to view the Requests module.

Request Options

Request categories are based on the receiving organization/office.

The request description is the official request, so make it count!

You can keep requests a secret from certain member groups.

OrgSync
Request Details

You can download PDFs of requests for your records.

If your request is rejected, you can easily re-request it with a few changes.

Treasury Journals

Download your checkbooks into an Excel workbook.

Create journals for specific events.

Click here to view the Checkbooks.
Journal Details

- Deleted transactions get crossed out, not removed.
- The balance is totaled at the end of every month.

Dues

- You can also view the journal with transaction details shown.
- Members can view their own payment history & make new payments.
- Administrators can view the dues payments of all members.

Click here to view the dues module.
Dues Payment History

Every dues payment is logged

Dues Credit Card Payment

Administrators can manually enter payments not made through OrgSync

All members can conveniently make payments using a credit card

Funds

The funds module is designed to help you conduct fundraisers

Track your donations for tax deductions

Click here to access the funds module

View the results of past fundraisers

View other's donations as well as donate

* For each credit card and check transaction, the cardholder pays a 3% maintenance fee and the organization pays a $0.25 transaction fee. The charge will appear from OrgSync on your statement.
Fund Options

Add a ledger code to each fund to easily import it into another accounting system.

Keep the fund’s total accurate and include offline donations.

Fund Details

You can dedicate donations to another person.

Close a fund once the fundraiser is complete.

Administrators can view the donation history of this fund.

Donation History

<table>
<thead>
<tr>
<th>Member</th>
<th>Date/Time</th>
<th>Amount</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>James Baker</td>
<td>May 02, 2007, 12:15PM</td>
<td>$125.00</td>
<td>$125.00</td>
</tr>
<tr>
<td>Megan Spears</td>
<td>May 02, 2007, 12:10PM</td>
<td>$300.00</td>
<td>$300.00</td>
</tr>
<tr>
<td>Demo OrgSync</td>
<td>May 02, 2007, 12:10PM</td>
<td>$250.00</td>
<td>$250.00</td>
</tr>
<tr>
<td>Demo OrgSync</td>
<td>May 04, 2007, 12:15PM</td>
<td>$100.00</td>
<td>$100.00</td>
</tr>
<tr>
<td>In Loving Memory of: John Smith</td>
<td>May 04, 2007, 12:05PM</td>
<td>$100.00</td>
<td>$100.00</td>
</tr>
</tbody>
</table>
Invoices

Invoices are used to bill members (e.g., dues, fines, and event fees).

Each member can view their current invoices.

Administrators can view every member's invoices.

Invoice List

Dues invoices will automatically note the payment in the dues module.

Partial payments in the dues module will reduce outstanding dues invoices.

Closing an invoice automatically adds an entry to the general ledger.
The OrgBank is for keeping track of credit card payments before they are remitted back to your organization.

The date a check is sent your treasurer will appear here.

Every album can show one of its pictures as the album cover.
Album Options

You can change who is able to view each album.

Album Pictures

Easily see the previous or next picture when browsing.

Click any image to see it larger with a caption.
Uploading Pictures

File Folders

Click here to see the Files module

Add titles and captions to all of your uploads at once

Upload multiple pictures at once

Easily set the album's cover picture while uploading

It's easy to see which members can access each folder
Files List

File icons show you what kind of file you’ll be downloading.

View who uploaded the file and previous versions.

File Versions

Every file has a description that applies to all versions.

Lock files to guarantee you’re the only one editing it.

Download previous versions of the file.

Describe the changes you made when uploading a new version.

View when updates were made and who made them.

New Version Options
Forums

Whether called forums, discussion boards, message boards, or bulletin boards, this module is designed to simplify member communication.

Forum List

<table>
<thead>
<tr>
<th>Title</th>
<th>Topics</th>
<th>Posts</th>
<th>Last Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Fraternity Questions</td>
<td>1</td>
<td>4</td>
<td>May 29, 2007, 04:06PM</td>
</tr>
<tr>
<td>Social Activity Forum</td>
<td>2</td>
<td>6</td>
<td>May 29, 2007, 04:48PM</td>
</tr>
</tbody>
</table>

Create different discussion boards for any number of topics.

Forum Options

You can limit each forum to a different group of members.

Forum Topics

Forums are organized into an unlimited number of topics.
**Topic Posts**

Topics are made up of posts made by your members.

Easily identify a poster by their profile picture.

**Store**

The Store is designed to help you collect orders for organization apparel and accessories.

The Store can contain multiple sales.

**Sale Options**

Sales will only accept orders between their start and end dates.
Sale Items

Sales are made up of multiple items

Items can come in multiple sizes

Item Options

OrgSync can limit the number of items sold if inventory is an issue

Vendor Report

The vendor report shows you how much of each item to order from the supplier
Merchant Report

The merchant report shows you how to distribute the items once they arrive from the supplier.

Public Website / Extranet

Every website gets its own custom URL. Click here to access your website.

Define common elements of your site or use a template.

Content Pages

Create an unlimited number of pages that you can change at any time. Linking pages, images, and files is easy when you use Quick URLs.
Insert Quick URLs to easily add module data to any page.

Advanced users can add HTML code directly.

Images

You can edit web pages with a rich text editor - no programming experience needed!

Upload and include pictures as easily as regular website text.

Files

Upload files for anyone to download.
Including Modules

You can include some of OrgSync’s core modules in your extranet pages. To add one of the following to a content page, insert the Quick URL where you want the module to appear. Note: some of the following are formatted with CSS, make sure your CSS is set up correctly.

To see the content of a module, it must be set to allow Public access (in Settings -> Group Permissions) as well as each individual element must be available to “Everyone” (in the “Make this available to” checkboxes for that element).

<table>
<thead>
<tr>
<th>Module</th>
<th>Quick URL</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calendar</td>
<td>[module:calendar]</td>
<td>Enabled</td>
</tr>
<tr>
<td>Contact Us</td>
<td>[module:contact]</td>
<td>Enabled</td>
</tr>
<tr>
<td>Event List</td>
<td>[module:events]</td>
<td>Enabled</td>
</tr>
<tr>
<td>File Folders</td>
<td>[module:files]</td>
<td>Enabled</td>
</tr>
<tr>
<td>Forms</td>
<td>[module:forms]</td>
<td>Enabled</td>
</tr>
<tr>
<td>Links</td>
<td>[module:links]</td>
<td>Enabled</td>
</tr>
<tr>
<td>Login Form</td>
<td>[module:login]</td>
<td>Enabled</td>
</tr>
<tr>
<td>Meetings List</td>
<td>[module:meetings]</td>
<td>Enabled</td>
</tr>
<tr>
<td>News</td>
<td>[module:news]</td>
<td>Enabled</td>
</tr>
<tr>
<td>Officer List</td>
<td>[module:officers]</td>
<td>Enabled</td>
</tr>
<tr>
<td>Orgwall</td>
<td>[module:orgwall]</td>
<td>Enabled</td>
</tr>
<tr>
<td>Picture Albums</td>
<td>[module:pictures]</td>
<td>Enabled</td>
</tr>
<tr>
<td>Polls</td>
<td>[module:polls]</td>
<td>Enabled</td>
</tr>
</tbody>
</table>

Group Permissions

Easily set the permission level for member groups with a single click.

Collect data from non-members using custom forms.