Chapter Administration

A Welcome Tour

Login To ONCARD

Go to agohq.org

ONCARD Login

Enter your username and password to continue. First time login: Your username is the first letter of your first name followed by your last name, with no space in between. (For example, Jane Doe's username would be JDoe). Do not include apostrophes or hyphens. If your last name has a space, leave the space. (For example, Dick Van Dyke's username would be (DVan Dyke).

Your default password is your member ID which is found just to the left of the date on the address label of The American Organist magazine.

Username

Password

Log In

We recommend either the Firefox or Chrome browser while using ONCARD. Some users have experienced problems with Safari because of its autofill features.

Enter your credentials

Click on Chapter Administration

Make a Contribution

Shop the AGO Store

Find A Job

Update Personal Information

Find A Guild Member

Username & Password Change

Password Reminder

Chapter Administration

Chapter Information:

Test Chapter

Chapter Set-Up

- Chapter Information
- Remove Chapter Members
- Officer Roster

Chapter Management

- Member Roster
- Export Member Data
- Print Chapter Data Collection Form
- Member Change Logs

Chapter Finances

- Pay Chapter-Sponsored Member Invoices
- Print/Email Member Invoices
- Review Remit Reports

1. Banking Information
2. Chapter Friend Amount
3. Chapter-Specific Data
4. Chapter Contributions

Banking Information

* Note: Only a Chapter Treasurer Can Update Banking Information

Chapter Friend Amount

Description
Which Days Are You Available
Which Days Are You Available to Substitute?
I am available to Substitute on Sundays
Select the Days You Are Available to Substitute
Are you available to teach?
Second Email Address
What Instruments Can You Teach?

Chapter-Specific Data

Add a New Question

Click the plus sign and follow the on screen instructions

Additional Fields			
Field Name	**Description**	**Type**	➕
C999_DAYS_I_CAN_WORK	Which Days Are You Available	Option	✏️✂️
C999_SUB_DAYS	Which Days Are You Available to Substitute?	Memo	✏️✂️
C999_SUNDAY_SUB	I am available to Substitute on Sundays	Checkbox	✏️✂️
C999_DAYS_AVAILABLE	Select the Days You Are Available to Substitute	Option	✏️✂️
C999_TEACH	Are you available to teach?	Option	✏️✂️
C999_EMAIL_ADDRESS	Second Email Address	Alpha	✏️✂️
C999_INSTRUMENTS	What Instruments Can You Teach?	Option	✏️✂️

Chapter Name	Test Chapter			Return to Chapter

Additional Field Information

Field Name:		Affiliate:	AGO
Description:		Sort Order:	
Status:	Active	Group:	Chapter Specific
History:	No	Type:	
Required:	No		
Use In Member Directory?:	☑		
Show On Member Profile?:	☑	Show On Member Application/Renewal?:	☑

Fields to Complete:
1. Field Name: If more than one word connect by an underscore. Example Sub_Days)
2. Description: The question you want to ask.
3. Type: The kind of field you want to create. **Alpha** (single line of text with character/word limits); **Memo** (for larger amounts of text) **Checkbox**; **Number** (decimals allowed); **Integer** (no decimals); **Date**, and **Option** (a list of potential answers with radio buttons next to each one allowing a variable number of choices).

Add a New Chapter Contribution

- Scroll Down to an Open Contribution Field

- Name the Contribution

- Add a Short Description

- Keep the Dollar Amount Requesting Set to $0

- Check the box to make it available to members on-line.

Description | Contribution Option 3

Additional Description

Font family | Font size | Format | **B** *I* U ABC A ▾

Dollar Amount Requesting: | 0 | Available to Members On-Line?

Remember to

Save Changes

Remove Chapter Members

Danger:
Never use this feature

Officer Roster:

1. Update the "Position To" Date for Returning Chapter Officers
2. Add New Chapter Officers
3. Delete Out-Going Chapter Officers

Helpful Hints

- Before adding a new officer, use the scissors icon to DELETE the record of the incumbent.

- Before adding a new Dean, create a Past Dean record for the outgoing dean. Term dates should be left blank on the Past Dean record.

- Never update name or contact information on an officer record.

Update the "Position To" Date for Returning Chapter Officers

❖ Click on the pencil icon

Dean ***		8/24/2018	7/1/2020	🖉 ✂

❖ Update the term end date

Term Starts:	8/24/2018	Term Ends:	7/1/2022

Post Changes   Clear Form

❖ Click   **Post Changes**

❖ Return to the officer roster by clicking   **View Officers**   at the top of the page.

Delete All Officers Who Will No Longer Be Serving On The Board

Click the scissors icon next to the name of the out-going officer

When asked to confirm, click ok

Confirm: Are you sure you want to remove the Dean from the current chapter?

OK   Cancel

Note: This text is a little scary. Don't worry, you are only removing this person from the officer roster. You aren't removing them from the "current chapter"

Add All Officers New To The Board

Click

Click ➕

Follow

Follow the instructions in red on this page.

Remember

Remember to click

Post Changes

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Member Roster

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Review Remit Reports

Member Roster:

1. Interpret Member Roster page
2. Filter by Expiration and Membership Type
3. Find Each Member's Contact Information
4. Chapter Administration
5. Invoice Preference

Interpreting Information on Member Roster Page

Name	Exp. Date	Membership	Chapter(s)	Email?	Primary Chapter Status

Membership Column = Type of Membership in your chapter. If it says Young Organist, Regular, or Special, it means that this member's primary membership is in your chapter. If the type of Membership is Dual, it means that this member has a dual membership in your chapter.

Chapter(s) Column = Primary or Dual Chapters based on the Membership Column. If the member is listed as a Young Organist, Regular, or Special member in the Membership Column, the chapter(s) column gives you that person's dual chapters. If the person is a Dual Member in the Membership Column, the chapter(s) column gives you the person's primary/other dual chapters.

Examples

Membership	Chapter(s)
Dual Member	Tulsa Chapter

Membership	Chapter(s)
Young Organist	Bangor, Los Angeles, San Diego

This member is a Dual Member of your chapter whose Primary Chapter is Tulsa.

This member is a Young Organist whose primary chapter is your chapter and whose dual chapters are Bangor, Los Angeles, and San Diego.

Filter Records

Find Members Who Need to Renew

Filter By Expiration Date

Filter Records:

Membership Status:	All
Membership Type:	--
Expiration Date >= (mm/dd/yyyy)	06/01/2021
Records Per Page	20

Click Process and Then Export

Process (at the bottom of the page)

Export to Excel (at the top right-hand corner of the page)

Sort Excel Spreadsheet

Highlight Column D

Click Sort Smallest to Largest
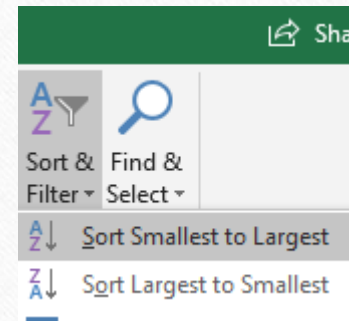
Contact Those Members Up For Renewal

Find Lapsed Members

Email or Call

- Contact Information is included on the excel spreadsheet.

- Encouragement to renew from a Chapter Leader is imperative to member retention! Thank you so much for contacting your members!

Filter By Membership Type

Filter By Membership Type

Filter Records:

Membership Status:	All
Membership Type:	Young Organist
Expiration Date >= (mm/dd/yyyy)	06/01/2021
Records Per Page	20

Click Process and Then Export

Process (at the bottom of the page)

This will be especially useful this year during the *Year of the Young Organist*. It will help you quickly find all the Young Organists in your chapter (Primary and Dual)

Find a Member's Contact Information

On Excel Output

Column I = email address

I
email

Columns AB, AC, and AD = phone numbers

AB	AC	AD
work_phone	home_phone	mobile_phone

From Member Roster Page

Click Pencil to the right of a Member's Name for email

Primary Chapter Status	
Invoiced not Paid	✏️

Then, click View/ Edit address information for phone numbers and postal addresses.

View/Edit Address Information

Chapter Administration for Each Member

- Click Pencil Next to Member's Name

- To Remove from Chapter, check box and Post Changes

- To Mark Deceased, check box, enter date of death (if known), and Post Changes

- To Make a Member Chapter-Sponsored, enter the Member ID of your chapter treasurer, and Post Changes

Paper Invoice

If you know one of your members wants a paper invoice, make sure the box is checked to the right of their name.

Primary Chapter Status		Paper Invoice?
Invoiced not Paid	🖊 Print	☑

Test Chapter

Chapter Set-Up

    Chapter Information

    Remove Chapter Members

    Officer Roster

Chapter Management

    Member Roster

    Export Member Data

    Print Chapter Data Collection Form

    Member Change Logs

Chapter Finances

    Pay Chapter-Sponsored Member Invoices

    Print/Email Member Invoices

    Review Remit Reports

Export Member Data:

1. Can't be filtered before creating. Must be filtered entirely in excel
2. This export includes all postal addresses
3. Includes answers to chapter-specific questions

- It looks like you can search for members. Unfortunately you can't.

- However, you can create an excel download that has all the information you could ever need about all AGO members who have your chapter on their membership record (current and cancelled).

- This is very useful to those comfortable using excel.

- To create this excel spreadsheet, click Export results and then clicking HERE when prompted to do so.

Please Enter Search Criteria:

Last Name:

Search Members

Export Results

Download this file by clicking HERE

This excel spreadsheet includes the answers your members have given to your chapter-specific questions

In the example below, they start at column BE…meaning you have to scroll over many columns to get there.

BE	BF
I am available to Substitute on Sundays	Select the Days You Are Available to Substitute
	Sunday, Wednesday, Thursday

Test Chapter

Chapter Set-Up

> Chapter Information

> Remove Chapter Members

> Officer Roster

Chapter Management

> Member Roster

> Export Member Data

> **Print Chapter Data Collection Form**

> Member Change Logs

Chapter Finances

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Print Chapter Data Collection Form:

1. Blank Form that has all the fields from the personal information page, including your chapter's chapter-specific questions

Member Information

Prefix   First Name   M.I.   Last Name   Suffix

_____ _____ _____ _____ _____

Other Credentials: _____

Birth Date: _____

AGO members 65 and over receive a discounted dues rate.

Spouse/Partner Name: _____

Email: _____

Home Address (Including Apartment # if applicable)

Home Phone #: _____

Cell Phone #: _____   Primary Address?: ☐

Fax #: _____   Delete Address?: ☐

Address Line 1: _____

Address Line 2: _____

City: _____

State: _____

Zip: _____

Country: _____

Chapter Data Fields

I am available to Substitute on Sundays   ☐

Select the Days You Are Available to Substitute

Check Up To 5 Options   ☐ Saturday

☐ Sunday

☐ Thursday

☐ Tuesday

☐ Wednesday

Member Change Logs:

1. Details changes made by your members

2. Address updates

3. Date renewed membership

Filtering Functionality

Snapshot of the Test Chapter's Change Log

Id #	Name	Action Date	Action Type	Description
100603	Molly Davey	Friday, August 6, 2021	ADDR	Home Address: 475 Riverside Dr, Suite 1260, New York, NY, 10115
100603	Molly Davey	Friday, August 6, 2021	Chapt Position	Chapter position (C999- 8) deleted online by officer Davey Molly
100603	Molly Davey	Friday, August 6, 2021	Joined Chapter	Joined Chapter
98896	Elizabeth George	Friday, August 6, 2021	Chapt Position	Chapter position (C999- 1) deleted online by officer George Elizabeth
90196	Daisy Member	Friday, August 6, 2021	Chapt Position	Chapter position (C999- CADMIN) dates updated online by officer Member Daisy
90196	Daisy Member	Friday, August 6, 2021	EMAL	No email address
90196	Daisy Member	Thursday, August 5, 2021	Chapt Position	Chapter position (C999- CADMIN) dates updated online by officer Member Daisy
88348	Leah Semiken	Thursday, August 5, 2021	Joined Chapter	Joined Chapter
57019	Harold Calhoun	Thursday, August 5, 2021	Joined Chapter	Joined Chapter
98896	Elizabeth George	Thursday, May 13, 2021	Dues Payment	Member In 2021 to 2022 Cat: MBR D002

Pay Chapter-Sponsored Member Invoices:

1. The invoices for your chapter-sponsored members will appear here.

2. They can be paid by credit card in one payment.

3. Only the national portion will be charged.

Test Chapter's Pay Chapter-Sponsored Member's Page

Description	Invoice Amount	Total Paid	Unposted Payments	Adj.	Balance Due	Pay?
Molly Davey	$105.00	$0.00	$0.00	$0.00	$105.00	☐
Ashleigh Hendrix	$32.00	$0.00	$0.00	$0.00	$32.00	☐
Mr. Harold Calhoun	$47.00	$0.00	$0.00	$0.00	$47.00	☐
				Total Balance Due:	$184.00	

Pay Selected Invoices   Reset Form

***Note:** Molly Davey is the Chapter Treasurer of Test Chapter. She is able to pay her renewal invoice at the same time as she is paying for her chapter's Chapter-Sponsored Members. Since she is not Chapter-Sponsored, her invoice is for the full amount.

Steps to Make a Payment

Check the Boxes next to the invoices you would like to pay.
Then click Pay Selected Invoices

$32.00	☑
$47.00	☑

Pay Selected Invoices

Enter Credit Card Information and Submit Payment

Name on Card	Molly	Davey
Email Address	molly.davey@agohq.org	
Card Type/Number	-- no selection --	
Expiration Month/Year	--	--
Payment Amount:	$79.00	

Submit Payment   Clear Payment Info

Note: the payment amount will total all selected invoices

Test Chapter

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> Pay Chapter-Sponsored Member Invoices
>
> **Print/Email Member Invoices**
>
> Review Remit Reports

Print/ Email Member Invoices:

1. Print Member Invoices to mail to your members

2. Email your members as copy of their invoice with a note.

*Note: Best to use Firefox
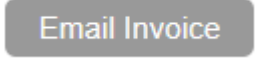
Print Member Invoices

- Check the Print Invoice Box next to the name of any member who needs a printed invoice. You can check multiple boxes at a time. Note: Only the names of members who have an unpaid/ open invoice will appear on this page.

- Click Print Selected Invoices and follow the prompts on your computer to print.

Exp. Date	Membership	Status	Print Invoice?
8/1/2020	Regular	Invoiced not Paid	☑
10/1/2020	Chapter Friend	Invoiced not Paid	☑
8/1/2020	Special	Invoiced not Paid	☐
8/1/2020	Regular	Invoiced not Paid	☑

Print Selected Invoices

Email a Member Invoice

- Click **Email Invoice** next to a member's name.

- Write a personal message in the text box provided. The member's invoice will already be attached as a pdf.

- Click Send Invoice at the bottom of the screen.

- The following will appear:

The invoice has been emailed.

From	molly.davey@agohq.org
Subject	AGO Membership Dues Invoice
Attachment	461543.pdf

Message

Font family | Font size | Format | **B** *I* U ABC A ▾ ✎ ▾
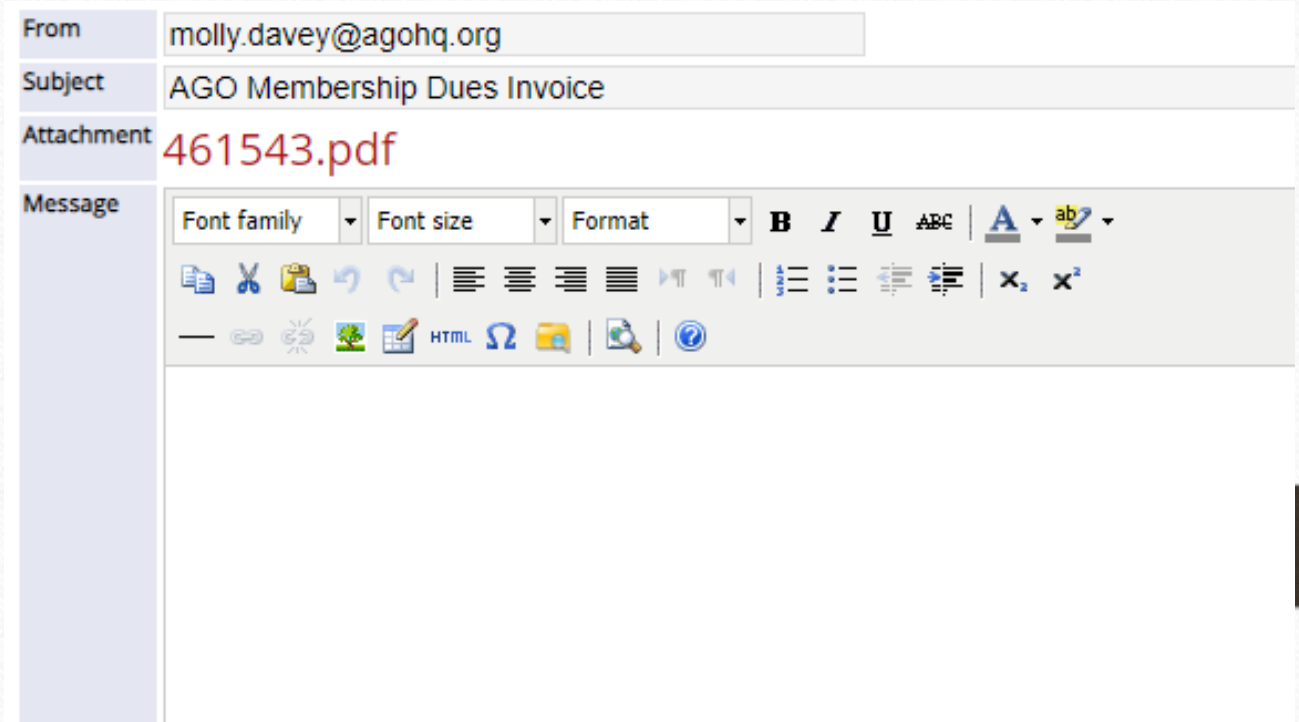
Send Invoice

Note: After each email, you will be asked to logout and then login back in to Chapter Administration again.

Review Remit Reports:

1. See the details behind an ACH deposit: renewals and chapter contributions

Funds in reports #394-397 were remitted on February 10, 2021

Funds in reports #398-401 were remitted on March 10, 2021

Funds in reports #402-406 were remitted on April 13, 2021

Funds in reports #407-410 were remitted on May 10, 2021

Funds in reports #411-414 were remitted on June 9, 2021

Funds in reports #415-419 were remitted on July 9, 2021

Use the "Key" Given on the Remit Report Screen to determine the report range

Create a Report

PDF – enter report range next to **Create Report as a pdf:**

Select Remit Report:	--	
Enter Report Range	415	to 419

Once you've entered the range, click "Create Report as a pdf"

Excel –enter report range next to **Create Excel Export:**

Select Remit Report:	--	
Enter Report Range	415	to 419

Once you've entered the range, click "Create Excel Export and then click HERE when prompted

Download this file by clicking HERE.

Sample PDF Report

Name	Post Date	Amount	Description
Peter .	06/02/2021	($100.00)	Pipe Organ Encounter (POE)
C385 Total:		**($100.00)**	
Peter	06/02/2021	($33.00)	Chapter Dues - Special
Frederick	06/04/2021	($33.00)	Chapter Dues - Special
Jason	06/03/2021	($41.00)	Secondary Chapter Dues
John	06/04/2021	($33.00)	Secondary Chapter Dues
Nicholas	06/03/2021	($33.00)	Secondary Chapter Dues
Kathy	06/02/2021	($33.00)	Secondary Chapter Dues
Thomas	06/04/2021	($33.00)	Secondary Chapter Dues
Angelina .	06/01/2021	($41.00)	Chapter Dues - Regular
Prince	06/02/2021	($41.00)	Chapter Dues - Regular
Richard	06/01/2021	($33.00)	Chapter Dues - Special
Terence	06/02/2021	($41.00)	Secondary Chapter Dues

Member Dues Total:	**($649.00)**
Chapter Total:	**($849.00)**
Remit Total:	**($849.00)**
Report Total:	**($3,361.00)**

Sample Excel Report

post_date	amount	status_name_key	description
6/2/2021 13:25	-100	Peter	Pipe Organ Encounter (POE)
6/4/2021 12:46	-33	John	Secondary Chapter Dues
6/4/2021 12:46	-33	Nicholas	Secondary Chapter Dues
6/4/2021 13:02	-41	Richard	Chapter Dues - Regular
6/3/2021 13:58	-33	Nicholas	Secondary Chapter Dues
6/4/2021 12:46	-41	Craig	Secondary Chapter Dues
6/3/2021 13:58	-41	Jason	Secondary Chapter Dues
6/4/2021 13:02	-33	Thomas	Secondary Chapter Dues
6/2/2021 13:25	-41	Prince	Chapter Dues - Regular
6/4/2021 12:46	-33	Frederick	Chapter Dues - Special
6/1/2021 12:16	-33	Richard	Chapter Dues - Special
6/1/2021 12:19	-41	Angelina	Chapter Dues - Regular

Call If You Need Help

We are always here for you and can be reached at

(212) 870-2310