



# FGS Website User Guide

For Member Societies and Family Associations,  
Associate Organizations, and FORUM Subscribers

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## Introduction

This guide provides information for Federation of Genealogical Societies members, associate organizations, and *FORUM* subscribers regarding managing their account and accessing member benefits or subscriptions.

FGS is now using NeonCRM to manage membership and subscription accounts. This system will be used for future conference registrations starting with the FGS 2019 conference, and other functionality may also be added in the future. As additional functions are added, details about those will be added to this guide.

## Your Account

All FGS membership accounts now run on a 12-month basis rather than for the calendar year. New membership and subscription accounts will expire at the end of the month 12 months from the date the application was processed. (Example: If you join on 8/10/2018, your account expiration date will be 8/31/2019.)

Renewals may be processed prior to the account expiration date or within 30 days after that date. For renewals, the existing account expiration date will be extended by 12 months. (Example: If the renewal date is 8/31/2018 and you renew prior to that date or within the 30-day grace period, your new account expiration date will be 8/31/2019.) After the 30-day grace period, you will be joining rather than renewing and the date will be set according to the new membership description above.

Access to member benefits and subscriptions end on the account expiration date. They will not be available during the 30-day renewal grace period.

## Login/Logout

To log into your account, click the "LOGIN" link in the upper left corner of any page. When you are logged in, that link will change to "LOG OUT" and the "MY ACCOUNT" link will display next to it.

Your login landing page is the "FGS Account Dashboard." (See that section for further details about that page.) The "MY ACCOUNT" link will return you to the dashboard page from any other page on the website. Click "LOG OUT" any time to log out of the website.

## Member Societies and Family Associations

In the old FGS member management system, each member organization had one account, which required the main contact, delegate, and board members to share one login and password. With this new system, member societies and family associations can create individual sub-member accounts for their delegate and

board members to give them easy access to member benefits. (See FGS Delegate and Society Leader Accounts for more information about creating those.)

Please do not create accounts for or distribute FGS Members Only information and materials to your society's general membership. That includes FGS *FORUM* magazine. The tools FGS provides with your membership are to help your leadership with society management. If members of your organization wish to receive *FORUM*, subscriptions are available.

### Choosing the Right Email Address

FGS recommends that members use an organizational email address that is always monitored by someone active in the organization for the main account. Some system generated emails, like your renewal notice, only go to the main contact email. Having an organizational email address on the account ensures important communications reach your organization.

If your organization doesn't have domain email accounts, you can create an organizational email in any free email program. (Example: [mygenealogicalsociety@gmail.com](mailto:mygenealogicalsociety@gmail.com))

### Associate Organizations

Associate organizations have one account and member benefits are available to the contact person listed in that account. Contact information should be updated as changes occur.

### FORUM Subscribers

Individuals and organizations subscribing to FORUM have one account for accessing the magazine. The most recent four issues are always available to subscribers. Contact information should be updated as changes occur.

### FGS Delegate and Society Leader Accounts

Each member society and family association can have one FGS Delegate account and Society Leader accounts for all board members who do not have one as either the organization's main contact or the FGS Delegate. These accounts have the same access to member benefits as the organization's account used by the contact person.

FGS recommends that the main contact for the organization and the FGS Delegate not be the same person, but if they must be, it's best to use different email accounts. See "Choosing the Right Email Address" for more information about your organization's main contact.

To add a new FGS Delegate or Society Leader:

- Log into the organization's main account.
- Select "Review or Renew My Membership."
- Select "Contacts: Add" under "Additional Sub Members & Memberships" and complete the "Membership Application" form.
- Information required to create the account is: First and Last Name, Address, Phone Number, and Email Address.
- You will need to create a login name and password for each account. The user will be able to reset the password, but the login name can't be changed. FGS recommends that you use first name initial and last name as the login name (example: John Smith = jsmith). If that name is already in the system you will get a message to select another login name.
- Select either Society Leader or FGS Delegate as the membership type. Remember, each society gets one FGS Delegate. You can add as many Society Leader accounts as needed based on the number of board members.
- The Start and End Date will automatically load the dates from your organization's account. Those dates cannot be changed.
- System emails will be sent to notify the individual about their account.

To change the delegate in the system, you should first select that account from the list and click "Contacts: Remove" to delete it. Multiple Society Leader accounts may be created.

If an existing Society Leader leaves your board, please remove their account by selecting that account from the list and clicking "Contacts: Remove" to delete it.

Accounts may not be created for an organization's general membership as the tools and services FGS provides are for society management only.

## Deferred Payments

FGS members, associate organizations, and *FORUM* subscribers have the option to complete the online application but defer payment to mail in a check. This option is available for both new members/subscribers and renewals.

New members and subscribers who defer payment will not have access to benefits or subscriptions until the payment is received by the FGS office and the account is updated to reflect that the payment was made.

Renewals who defer payment will continue to have access to benefits through the end of their current membership term. If payment is not received before the end of the current membership term, benefits or subscriptions will become inaccessible until the payment is received.

## FGS Account Dashboard

The screenshot shows the FGS Account Dashboard. At the top is a navigation bar with links for HOME, ABOUT, MEMBERSHIP, CONFERENCES, COMMUNITY, CONTACT, and a search icon. The FGS logo is centered in the navigation bar. Below the navigation bar is a large header area with the text "FGS Account Dashboard".

On the left side, there is a vertical column of six dark red buttons with white text:

- Access Members Only Benefits
- Access FORUM Subscription
- Review or Renew My Membership
- Update My Profile
- Change My Password
- View My Registered Event

On the right side, there is explanatory text and a list of account types:

From this portal, you can access account information and membership or subscription benefits as well as all public content on the Federation of Genealogical Societies website.

The Access Members Only Benefits button is available to member genealogical societies, historical societies, family associations and their society leaders and FGS delegate. It is also available to associate organizations.

The Access FORUM Subscription button is available to FORUM subscribers. Member organizations will access FORUM through a different page included in the Members Only section.

The other five buttons connect to options for managing your FGS account. Use the menu at the top of the page to navigate the public pages of the website. To log out, hover over your name in the black bar at the top of the page & click "log out."

Select the type of account you have from the list below for details about using these options. Also, see the **FGS Website User Guide** for additional details about managing your account.

- + Main Account for Member Genealogical Society, Historical Society, or Family Association
- + Society Leader or FGS Delegate
- + Associate Organization
- + FORUM Subscriber

The FGS Account Dashboard is the login landing page for all FGS accounts. From this page, you can access account information and membership or subscription benefits as well as all public content on the Federation of Genealogical Societies website. You can return to this page by clicking “My Account” in the upper left corner of any page.

The buttons on the left side of the page lead to account management options and member benefits or FORUM subscriptions. The plus signs open a quick reference for additional information for each type of account. Those items are covered in more detail in this guide.

When you select “Access Members Only Benefits” or “Access FORUM Subscription” or any of the other FGS website pages, you can return to this dashboard by selecting “FGS Account Dashboard” from the main menu under “Membership.”

When you select one of the account management options, the page format will be different, but you will have the same account management options available under “What would you like to do?”

### Access Members Only Benefits


This button takes you to the “Welcome to the Members Only Area” page where FGS member organizations and associate organizations can access all FGS member benefits. This page is also accessible from the Main Menu under “Membership.” This page may only be viewed by users logged into a Member Organization, Society Leader, FGS Delegate, or Associate Organization account.


### Access *FORUM* Subscription

Only *FORUM* subscribers have access to this page, which is accessible from the button on the dashboard and also from the Main Menu under Membership. It contains links to the four most recent issues of the magazine. As a new issue is released, the oldest one is dropped.

Member and associate organizations, society leaders, and delegates access the magazine from the *FORUM* Archives page in the Members Only area.

# Review or Renew My Membership



HOME ABOUT MEMBERSHIP
CONFERENCES COMMUNITY CONTACT 

**Welcome Test Genealogical Society (Account# 20867)**  
 Your membership is currently active. [Details](#)

## Membership History

### Current Membership

Your Membership is currently active.

Membership	Start Date	End Date	Amount	Auto-Renewal	Actions
FGS Member Organization (51-99 members)	07/23/2018	07/31/2019	\$45.00	Off - Enable	<a href="#">Renew Now</a>

### Membership History

Membership	Start Date	End Date	Amount	Status	Transaction Details
FGS Member Organization (51-99 members)	07/23/2018	07/31/2019	\$45.00	SUCCEEDED	<a href="#">Details</a>

**Additional Sub Members & Memberships**

Contacts: [Add](#) [Remove](#) Sub-Membership: [Join](#) [Renew](#)

<input type="checkbox"/>	Action	Member	Membership	Fee	Start Date	End Date	Enrollment Date
<input type="checkbox"/>		Test Contact					

What would you like to do?

- [Review or Renew My Membership](#)
- [Update My Profile](#)
- [View My Registered Event](#)
- [Change My Password](#)
- [FGS Account Dashboard](#)

This page displays the current membership or subscription information and the membership or subscription history for your account. When your membership or subscription is nearing its end date, select the “Renew Now” button to process your renewal. You may also set your account to auto-renew from this page. Member organizations may add or remove accounts for their FGS Delegate and Society Leader through this option. See “FGS Delegate and Society Leader Accounts” for details about creating these accounts for your member society or family association.

**For member organizations, only the main account can renew the membership or add/remove the FGS Delegate and Society Leader accounts.**



# Update My Profile

HOME ABOUT MEMBERSHIP



CONFERENCES COMMUNITY CONTACT Q

Welcome Test Genealogical Society (Account# 20867)

Your membership is currently active. [Details](#)

## Your Profile

Upload a New Logo

What would you like to do?

- [Review or Renew My Membership](#)
- [Update My Profile](#)
- [View My Registered Event](#)
- [Change My Password](#)
- [FGS Account Dashboard](#)

### Basic Information

Organization Name \*

Test Genealogical Society

Organization Member Type \*

- Archive
- Business
- Educational Institution
- Family Association
- Genealogical Society
- Historical Society
- Library

Contact First Name: \*

Test

Contact Middle/Initial:

Contact Last Name: \*

Contact

### Contact Information

For all accounts, this option displays the basic contact information for the account and allows changes as needed. **To update a member organization’s profile, you must be logged in to the main account. FGS Delegates and Society Leaders can’t access this information through their accounts.**

## Find A Society Profile

For member and associate organizations, this option displays additional fields to expand your Find A Society listing. Complete as much of that information as you’d like. Keep in mind that your goal should be to provide information about your organization that will make a visitor to the FGS website click on your website link.

Fields available are:

Organized: Enter the date your organization was started.

Incorporated: If incorporated, enter the date it was originally done.

**Membership Information:** Enter general information about your organization, including cost of membership and how to join.

**Membership Benefits:** List benefits provided to your members.

**Meetings:** Provide information about regular meetings your organization holds. (Don't forget to add your events to Society Events. The submission form is located in the Members Only Area.)

**Publications:** List books, guides, and other publications your society has available for sale.

**Periodicals:** Provide information about journals or newsletters your organization produces.

Position your organization through your FGS "Find A Society" listing. FGS routinely promotes the FGS Find a Society Listing via email and social media.

### Upload Your Logo

Member and associate organizations may upload a logo to be displayed with their Find a Society profile. To upload a member organization's logo, you must be logged into the main account rather than a delegate or society leader account. This option does not apply to FGS Delegates, Society Leaders, or FORUM subscribers.

From the organization's profile page, click the "Upload A New Photo" button on the right side of the page, browse your computer for the file, and click "Submit."

For best results, upload a square 200px X 200px image in jpg or gif. The maximum size allowed is 1600px X 1200px, but a smaller image is recommended. If your organization's logo has been scaled to work as your Facebook page profile, that image will work well for your Find A Society profile. If your logo file is not square, it will be scaled to make the width fit in the space, which will create white space above and below it.

# Change My Password

This option allows you to change your password while logged in. If you ever lose or forget your password or Login Name, you can request a password reset from the login page by entering the email address associated with your account. If you forget the email address associated with your account, email [info@fgs.org](mailto:info@fgs.org).

## View My Registered Event

This option will display conference registration information for individuals registered for an upcoming FGS conference starting in 2019. FGS Delegates, Society Leaders, and FORUM subscribers should log into their existing account before registering for FGS conferences.

This option does not apply to member and associate organization accounts. The main contact for those accounts will create an individual account when registering for a conference. Additional details will be provided for this process when conference registration opens.

## Submit Society Events

Member societies, family associations, and non-profit associate organizations can submit their events to be listed on our Society Events page. You must be logged in as either the main account for a member organization, a society leader, a delegate, or an associate organization to submit an event. Fields available are:

Event Title

**Event Description:** Give a brief overview of your event including names and short bios for speakers.

**Event Date and Time**

**Event Category:** Select from the dropdown list.

**Location Details:** Locations previously entered will be available in a dropdown list. You can select one or add a new location. When creating a new location, you must include a name for the venue.

Address is optional but should be provided. A Google Map link will be included with listings that include an address.

**Society Details:** Organizations previously entered will be available in the dropdown list. If your organization is not listed, enter the name and select "Create."