

WWW.BNI.COM

BNI Connect[®] Training

Entering and Managing

Visitors

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Visitor Related Operations

Overview

This manual will outline the process for adding a Visitor to BNI Connect® after one has attended a BNI meeting. Entering this data will generate an email from BNI Connect thanking the visitor for coming and directing them to the Chapter's President or the Executive Director if they have further questions.

The Visitor Entry Process

Start the Visitor Entry Process by logging in to BNI Connect[®] at <http://bniconnect.com>



The screenshot shows the BNI Connect login interface. At the top left, there is a navigation menu with the text "americas • europe • africa • asia • australasia" and a world map icon. The main header features the BNI logo and the text "BNI Connect™ Local Business - Global Network®". Below the header, the heading "Sign-in to BNI Connect" is displayed. The login form consists of two input fields: "Username :" and "Password :", each followed by a white text input box. Below these fields is a "Login" button. A link "Lost password? Click here." is positioned below the login button. At the bottom left of the page, the copyright notice "Copyright 2011 BNI. All Rights Reserved." and links for "Terms of Use | Privacy Policy" are visible.

Log into BNI Connect[®] using the username and password created when initially joining the website.

Once logged into the website, the “Dashboard” will appear. This screen will be the start or jumping off point for most of the functions in BNI Connect[®].

Entering a Visitor

After logging into BNI Connect®, choose the 'Chapter' option under the 'Operations' menu as shown in Figure 2.

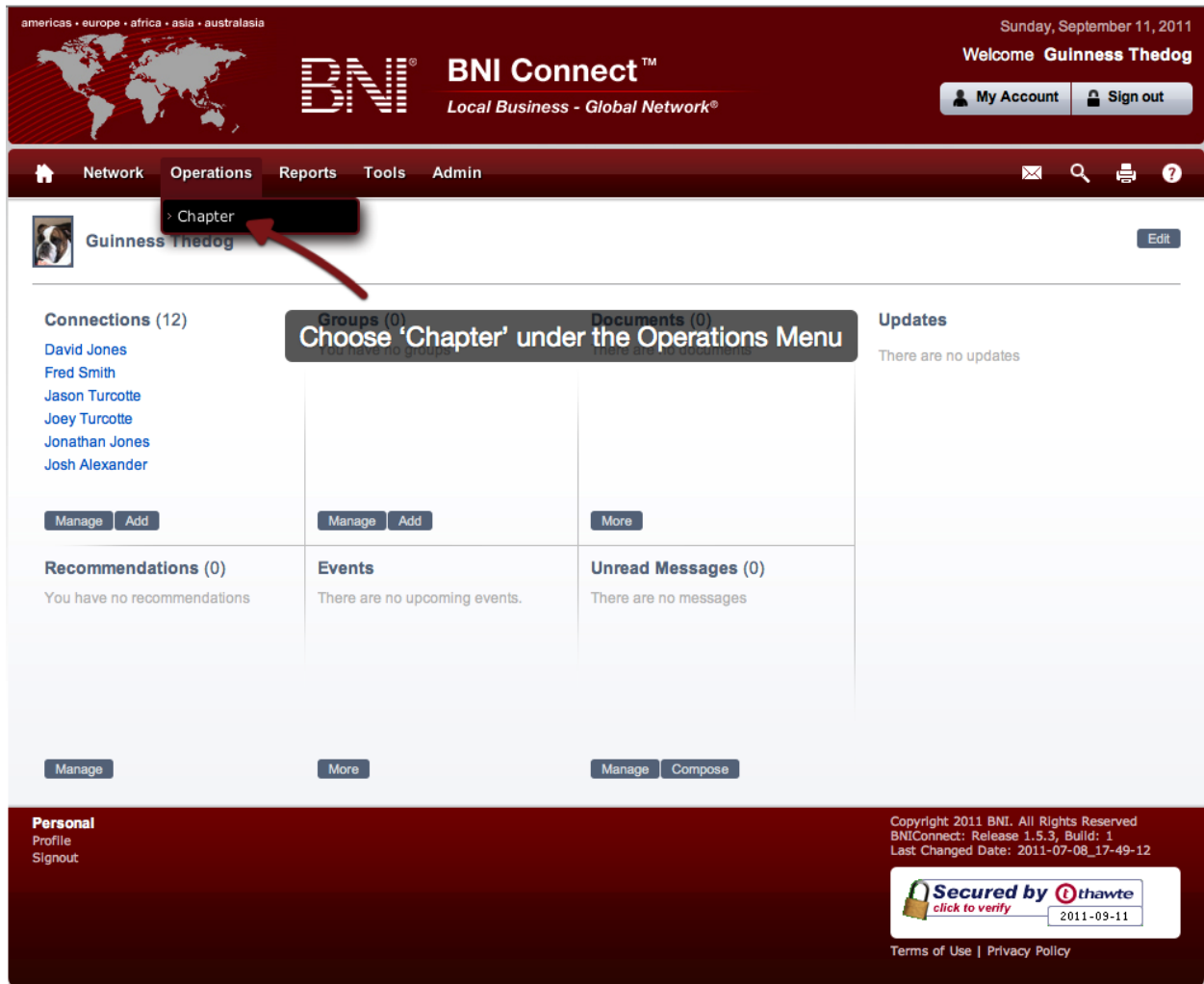


Figure 2

The next screen will show all the operations that can be performed at the Chapter level. As indicated in Figure 3, select 'Manage Visitor' in the list on the left and then select 'Add a Visitor' from the list on the right.

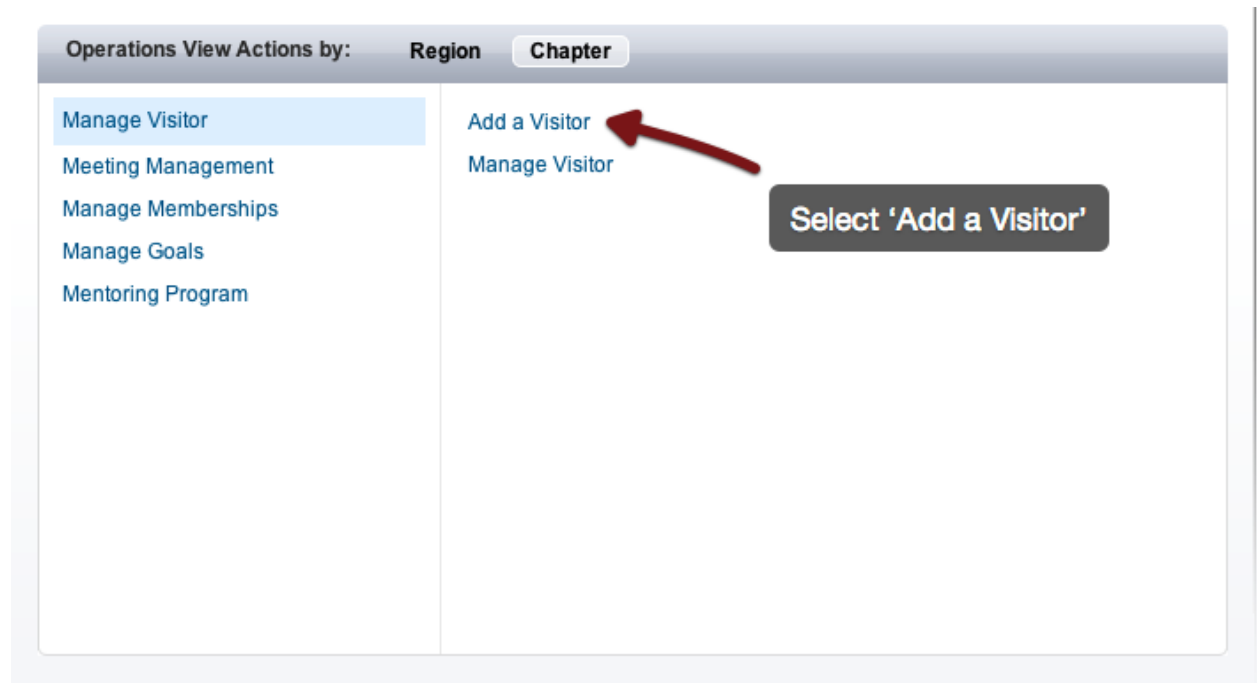


Figure 3

After selecting “Add a Visitor”, a pop-up box will appear asking for pertinent information about the Visitor. When all the data has been entered, click “Submit.” See Figure 4.

The image shows a pop-up window titled "Add a Visitor" with a close button (X) in the top right corner. The form contains the following fields: "Chapter" (dropdown menu with "Power Referrals" selected), "Industry" (dropdown menu with "Select Industry" selected), "Classification" (dropdown menu with "Select Classification" selected), "Invited By" (dropdown menu with "Select Person" selected), "Language" (dropdown menu with "English (US)" selected), "Visit Date" (text input field), "Title" (dropdown menu with "Select Title" selected), "First Name" (text input field), "Last Name" (text input field), "Suffix" (text input field), and "Company Name" (text input field). At the bottom of the form, there are two buttons: "Submit" and "Close".

Figure 4

Managing a Visitor

After a Visitor has been entered, Visitors can be managed by choosing “Manage Visitor” from the Chapter Operations screen (Figure 4). The screen will then ask for a start date and an end date. Once these dates have been entered, click the ‘Go’ button, this will display the screen shown in Figure 6.

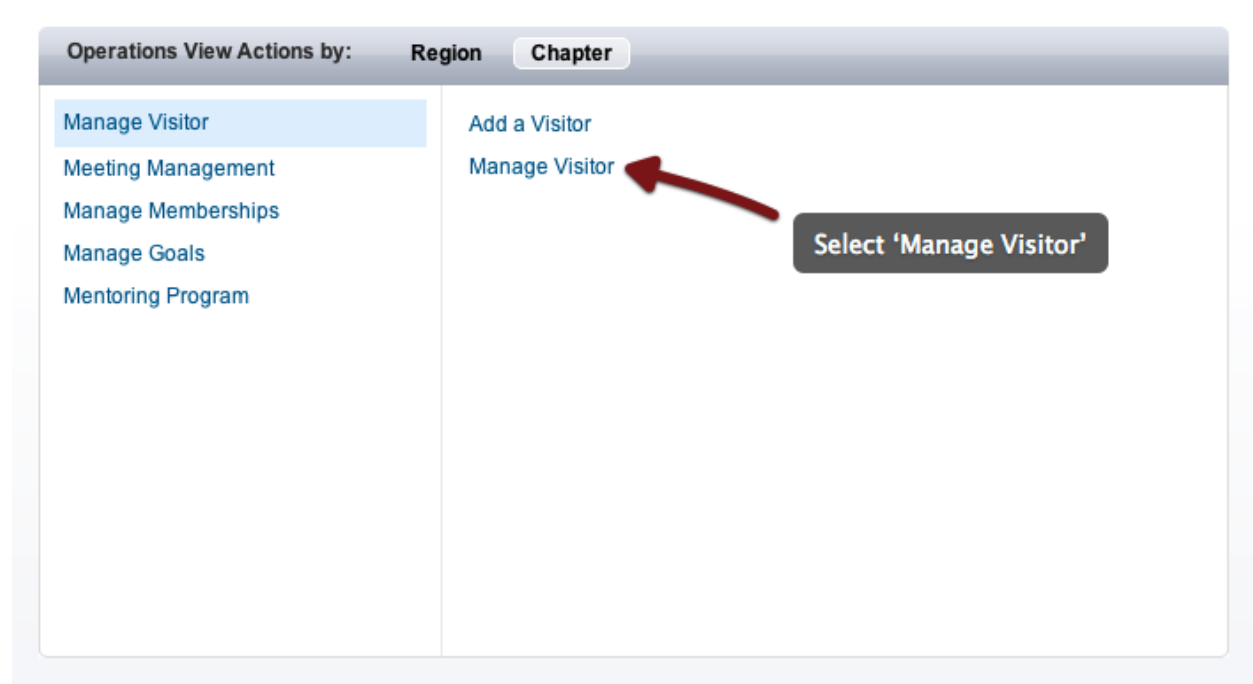


Figure 5

View / Edit Visitors List [Add Visitor](#) [Back](#)

Filter By: Training Use Training Two Power Referrals

Search Visitor(s)

From Start Date *

To End Date *

[Go](#)

Show entries Search:

Name	Company	Industry	Visit Date	Options
Lisa Turcotte	Turcotte Data & Design	Computer - Computer Databases	09/06/2011	

Showing 1 to 1 of 1 entries [First](#) [Previous](#) [1](#) [Next](#) [Last](#)

Figure 6

To the right of the Visitor's name will be the Company name, the Industry, the Visit Date and Options. The Options allows one of four things: Edit a Visitor, Convert Visitor to Prospect, Convert Visitor to Member and Delete Visitor.

Editing a Visitor

This option is to edit any information that was originally entered when the Visitor first attended.

Delete

This will permanently delete the Visitor's record. Use caution with this option.

Visitor Report

To access Chapter reports, choose the 'Chapter' option under the 'Reports' menu as shown in Figure 8 below.



Figure 8

To view a list of Visitors that have attended BNI meetings, choose the Visitor Report option on the next screen and then enter the Start and End Dates followed by the "Go" button (Figure 9). The report will look like the screenshot in Figure 10.

Filter By: Training Use Training Two Power Referrals

Reports View Actions by: Region Chapter

Member Training Report
 Chapter Roster Report
 Membership Dues Report
 Meeting Notes Report
 Summary PALMS Report
 Absence Report
 Classifications Not In Chapter
 Speakers Report
 Regional Leadership Report
 Sponsor Report
 Personal PALMS Report
 VP Report
 Cumulative VP Report
 Member Details >>
 Chapter Visitor Report

Chapter > Chapter Visitor Report * Required fields

Start Date * 10/01/2011

End Date * 10/06/2011

First Name

Last Name

Profession All

Go

Figure 9

Chapter > Chapter Visitor Report ✕

Export Print

Parameters

Chapter: Power Referrals

From: 10/1/11

To: 10/6/11

First Name:

Last Name:

Profession: All

Name	Company	Profession	Email	Visit Date
Bookworm, Bobbie	Bobbie's Books	Books		Oct 4, 2011
Jones, Sam	Jones Formal Wear	Formal Wear		Oct 4, 2011
Renauld, Laura	Acme Engraving Services	Engraving Services		Oct 4, 2011

Close

Figure 10

Conclusion

Entering, maintaining and viewing the Chapter's Visitors can be a very effective tool used for Chapter health and growth and should be encouraged.