

BNI DORSET

# Going Digital

January 2016

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# BNI Dorset – Going Digital January 2016

## 1. Online referral Completion Process

### a. Online referral:

Members may enter their own activity into BNI Connect using the online referral process. All referrals entered during the time between meetings will automatically be input into the upcoming week's PALMS report for the Membership Coordinator to review and approve. In addition to the statistical information, the full details of the slips will be available for the member to review through BNI Connect. The member may also make changes to the details of each slip up until the time that the PALMS is approved and submitted by the Membership Coordinator. When submitting referrals online, members should continue to announce and celebrate their weekly activity during the referral and testimonial portion of the meeting, though for most activity a paper referral slip is no longer necessary. The member may utilise the **“Print Your Weekly Slips”** function to turn in a paper referral to be included in the door prize drawing for that week's meeting.

### b. Referral Slip

#### Paper Slip

**BNI® referral slip**

Date \_\_\_\_\_

From \_\_\_\_\_

To \_\_\_\_\_

Referral \_\_\_\_\_

Inside  Outside

Given your card  Told them you would call

Address \_\_\_\_\_

Telephone \_\_\_\_\_

Email \_\_\_\_\_

Comments \_\_\_\_\_

How hot is this referral? Please circle one box only

5 "Hot"

4

3

2

1 "Tepid"

While I Testimonial  
Phone Character  
Member From

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#### BNI Connect Online Slip

Enter Referrals

**BNI® referral slip**

Date: 05/06/2013 | From: Jeremy Walsh

To: Please select from dropdown below or search cross chapter

Select a member from your chapter: [dropdown] OR Search Cross Chapter

Referral: \_\_\_\_\_

Referral Type:  Tier 1 (Inside)  Tier 2 (Outside)

Referral Status:  Given your card  Told them you would call

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

Comments: \_\_\_\_\_

How hot is this referral?

5 Hot

4

3

2

1 Tepid

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Save and New Submit Close

**Purpose:** Referrals are the foundation of BNI. Members join and stay in BNI based on the opportunity to generate referrals for their business. Tracking referrals is the starting point for members to measure the impact BNI has had on their business.

Referral slips are used to 1) report and track referrals members pass and to 2) record when a member has a 1st time visitor attend.

### c. Referral Slip:

**Online Slip Process** The online slip may be entered at any time between chapter meetings, but must be completed before the end of the chapter meeting to be counted

for the current week's PALMS report. To fill out the form, click on the "Pass a Referral online" link on the My BNI Business screen and complete all necessary fields.

Paul Haley is working on  Save

Change Password    Change Photo/Logo  
Update Profile/My BNI Page    Update Privacy Settings  
Renew Now

**My BNI Business**    MY BNI BUSINESS    My Personal Participation Report

The numbers reflected on the dashboard are based on PALMS reports submitted by the MC. Your reports will show all the slips you have entered in the system.

	Last 12 Months from today	Lifetime
Revenue Received to My Business (My ROI)	0	0
Referrals Received:	1	170
TYFTB Given:	0	30108
Referrals Given:	1	256
Visitor:	0	49
One to Ones:	1	9
CEUs:	0	0

- Say thank you for business involved
- Pass a referral online
- Record a one to one that you have had
- Enter CEUs
- Update progress of referrals received
- Business I have said thank you for
- My Referrals I have passed online
- My One to Ones I have had
- My CEU
- My report of referrals and progress
- Print activity report for chapter meeting

Pass a referral online

### BNI® referral slip

Date: 21/09/2015 | From: Paul Haley

To: Please select from dropdown below or search cross chapter

Select a Member from your Chapter OR Search Cross Chapter

Referral:

Referral Type:  Internal  External

Referral Status:  Given your card  Told them you would call

Address:

Telephone:

Email:

Comments:

How hot is this referral?

5 Hot  
4  
3  
2  
1 Tepid

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Save And New    Save    Close

There is also the option when you get to this stage to pass a referral cross chapter. By selecting "Search Cross Chapter"

**Pass a referral online**

To search for other users and members you must input at least two characters in any of the three search fields.

First Name

Last Name

Company

[Search](#) [Reset](#) [Back](#)

You would then complete the next fields as shown above.

Once the referral has been inputted, the member for whom the referral is intended will immediately receive an email notification with the details of the referral as well as the contact information of the member giving the referral.

Paul Haley is working on  [Save](#) [Change Password](#) [Change Photo/Logo](#) [Update Profile/My BNI Page](#) [Update Privacy Settings](#) [Renew Now](#)

**MY BNI BUSINESS** [My Personal Participation Report](#)

The numbers reflected on the dashboard are based on PALMS reports submitted by the MC. Your reports will show all the slips you have entered in the system.


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TYFTB Given:	0	30108
Referrals Given:	1	256
Visitor:	0	49
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CEUs:	0	0

- [Say thank you for business invoiced](#)
- [Pass a referral online](#)
- [Record a one to one that you have had](#)
- [Enter CEUs](#)
- [Update progress of referrals received](#)
- [Business I have said thank you for](#)
- [My Referrals I have passed online](#)
- [My One to Ones I have had](#)
- [My CEU](#)
- [My report of referrals and progress](#)
- [Print activity report for chapter meeting](#)

Members can then review/edit/delete referrals by returning to the MY BNI BUSINESS page and selecting “Referrals I have passed online” you can select the date range you want to look at to narrow the search.

To print out all your activity and take a copy of the referral you again return to the MY BNI BUSINESS PAGE and select “print activity report for chapter meeting”

Paul Haley is working on Save

[Change Password](#) [Change Photo/Logo](#) 

[Update Profile/My BNI Page](#) [Update Privacy Settings](#)

[Renew Now](#)

**My BNI Business** **MY BNI BUSINESS** [My Personal Participation Report](#)

The numbers reflected on the dashboard are based on PALMS reports submitted by the MC. Your reports will show all the slips you have entered in the system.

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- [Print activity report for chapter meeting](#)

If you would like to see in more detail how to past referrals online please refer to the below link:

<https://www.youtube.com/BNIConnectGlobal>

## 2. Reporting a One-to-one on BNI Connect

Only one member of the 1 to 1 pair needs to input the slip online, usually the person who initiated the meeting. The online slip may be entered at any time between chapter meetings, but must be completed before the end of the chapter meeting to be counted for the current week's PALMS report. To fill out the form, click on the "Record a one to one you have had" link on the My BNI Business screen and complete all necessary fields.

United Kingdom Dorset Bay, Bournemouth

Paul Haley is working on  Save

Change Password Change Photo/Logo  
Update Profile/My BNI Page Update Privacy Settings  
Renew Now

MSP

**My BNI Business** MY BNI BUSINESS My Personal Participation Report

The numbers reflected on the dashboard are based on PALMS reports submitted by the MC. Your reports will show all the slips you have entered in the system.

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TYFTB Given:	0	30108
Referrals Given:	1	256
Visitor:	0	49
One to Ones:	1	9
CEUs:	0	0

[Say thank you for business invoiced](#)  
[Pass a referral online](#)  
[Record a one to one that you have had](#)  
[Enter CEUs](#)  
[Update progress of referrals received](#)  
[Business I have said thank you for](#)

Record a one to one that you have had

## BNI® One-to-one follow up

Required fields

Chapter: BNI Directors Chapter 1

Met With \* Please select from dropdown below or search cross chapter 2

Select Met With 4 OR Search Cross Chapter 3

Invited By \* Select Invited By 5

Location \* 5

Topics of Conversation \* 6

Date \* 7

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8 9 10

Save And New Save Close

1. The chapter will automatically reflect your chapter. This slip will be automatically applied to the NEXT meeting's chapter PALMS report for you AND your One to One partner.
2. Choose the chapter member who you met with from the drop down list.
3. If you have met with a member in another chapter, you may search for a member within your region by clicking on "Search Cross Chapter".
4. Select which member initiated the One to One meeting.
5. Enter the location where you held your One to One meeting.
6. Enter a brief description of the Topics of Conversation.
7. Select the Date that you met with the other person.

8. Click Save and New to submit this slip and immediately enter another One to One slip.
9. Click Save and Quit to submit this slip and return to the home screen.
10. Click Close to discard this slip and return to the home screen.

## For your Records

Your weekly activity report of one-to-ones can be printed off to take to your next chapter meeting if you wish by selecting “My One-to-ones I have had” on the My BNI business screen. You then simply select the period of dates you want the report to show.

The numbers reflected on the dashboard are based on PALMS reports submitted by the MC. Your reports will show all the slips you have entered in the system.

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Chapter: One to One Report • Required Fields

Start Date

End Date

- [Say thank you for business invoiced](#)
- [Pass a referral online](#)
- [Record a one to one that you have had](#)
- [Enter CEUs](#)
- [Update progress of referrals received](#)
- [Business I have said thank you for](#)
- [My Referrals I have passed online](#)
- [My One to Ones I have had](#)
- [Mv CFII](#)

## 3. Reporting TFTB on BNI Connect

Thanking your fellow members for closed business on referrals you have been given is an important part of the ongoing referral process. This can be done anytime online in BNI Connect. Firstly select on the My BNI Business screen “say thank you for business invoiced”



United Kingdom | Dorset | Bay, Bournemouth

Paul Haley is working on  Save

Change Password | Change Photo/Logo  
Update Profile/My BNI Page | Update Privacy Settings  
Renew Now

MSP

**My BNI Business** | MY BNI BUSINESS | My Personal Participation Report

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Referrals Given:	1	256
Visitor:	0	49
One to Ones:	1	9
CEUs:	0	0

- Say thank you for business invoiced
- Pass a referral online
- Record a one to one that you have had
- Enter CEUs
- Update progress of referrals received
- Business I have said thank you for

You then need to complete all necessary fields.

Say thank you for business invoiced

### BNI® Thank you for the business

Chapter: BNI Directors Chapter | Date: 20/09/2015

Thank you to \* Please select from dropdown b  search cross chapter

Select thank you to  OR Search Cross Chapter

For a referral in the amount of £ \*

Business Type \*  New  Repeat

Referral Type \*  Internal  External  Spin off

Comments

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Save And New | Save | Close

1. The chapter and date will automatically reflect your chapter and the date the slip was entered. This slip will be automatically applied to the NEXT meeting's chapter PALMS report.
2. Choose your fellow chapter member from the drop down list whom you would like to thank for the closed business.
3. If you are thanking a member in another chapter, you may search for a member to thank within your region by clicking on "Search Cross Chapter".

4. Enter the net amount of closed business for which you wish to thank your referral source for. For a guide to calculating the net amount of closed business, please see your chapter director or regional office.
5. Choose whether this is a thank you for New business or Repeat business.
6. Choose the Referral Type that you are thanking for – Inside (Tier 1, a self referral), Outside (Tier 2), or a Tier 3+ (spinoff referral).
7. Enter any comments or remarks about this business thank you.
8. Click Save and New to submit this slip and immediately begin a new TYFCB entry.
9. Click Save and Quit to submit this slip and return to the home screen.
10. Click Close to discard this slip and return to the home screen.

## For your Records

Your weekly activity report of “business I have said thank you for” can be printed off to take to your next chapter meeting if you wish by selecting “business I have said thank you for” on the My BNI business screen. You then simply select the period of dates you want the report to show.

The screenshot shows the BNI My BNI Business dashboard. At the top, there are navigation tabs for 'United Kingdom', 'Dorset', and 'Bay, Boumemouth'. Below this is a user profile section for 'Paul Haley' with a 'Save' button and links for 'Change Password', 'Change Photo/Logo', 'Update Profile/My BNI Page', 'Update Privacy Settings', and 'Renew Now'. A gold 'MSP' badge is also visible.

The main content area is titled 'MY BNI BUSINESS' and includes a 'My Personal Participation Report' link. A yellow warning box states: 'The numbers reflected on the dashboard are based on PALMS reports submitted by the MC. Your reports will show all the slips you have entered in the system.'

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Revenue Received to My Business (My ROI)	0	0
Referrals Received:	2	170
TYFTB Given:	0	30108
Referrals Given:	1	256
Visitor:	0	49
One to Ones:	1	9
CEUs:	0	0

Below the table is a list of actions:

- Say thank you for business invoiced
- Pass a referral online
- Record a one to one that you have had
- Enter CEUs
- Update progress of referrals received
- Business I have said thank you for** (highlighted with a red arrow)
- My Referrals I have passed online
- My One to Ones I have had

On the right side, there is a 'Chapter: TYFTB Given Report' section with a 'Required Fields' indicator. It contains two date pickers: 'Start Date' set to '20/03/2015' and 'End Date' set to '20/09/2015', followed by a 'Go' button.







