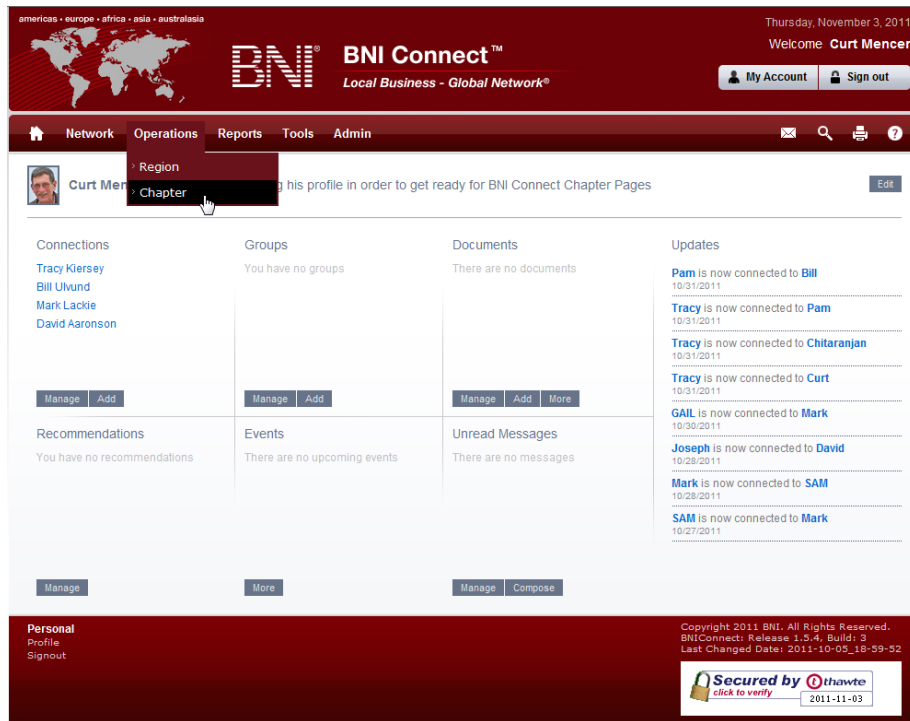
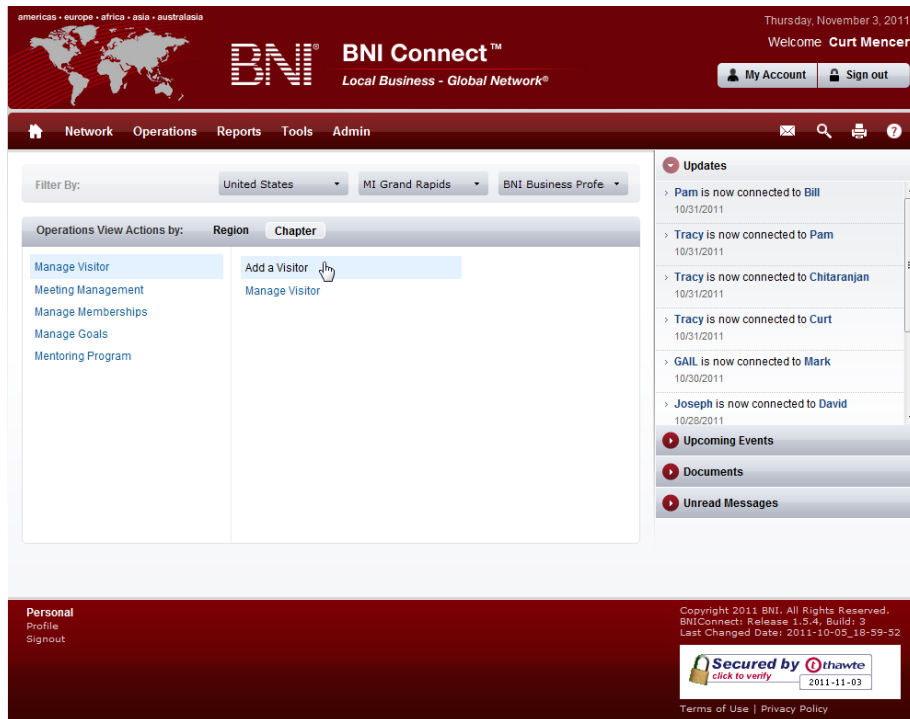


Entering Visitor Information in BNI Connect

1. Under **Operations** select "**Chapter**"



2. Next to **Manage Visitor** select **Add a Visitor**



3. The "Add a Visitor" dialog displays

The screenshot shows a web-based form titled "Add a Visitor". The form contains the following fields:

- Chapter: BNI Business Professionals of Fremont (dropdown)
- Industry: Select Industry (dropdown)
- Classification: Select Classification (dropdown)
- Invited By: Select Person (dropdown)
- Language: English (US) (dropdown)
- Visit Date: (text input)
- Title: Select Title (dropdown)
- First Name: (text input)
- Last Name: (text input)
- Suffix: (text input)
- Company Name: (text input)

At the bottom of the form are two buttons: "Submit" and "Close".

4. Select an **Industry** from the drop down. Your choices are shown below... I'll choose **Landscaping** for this illustration

This screenshot shows the "Add a Visitor" dialog box with the "Industry" dropdown menu open. The menu lists the following options:

- Select Industry
- Accounting
- Administrative
- Advertising
- Agricultural
- Animals
- Apparel
- Appearance
- Appliances
- Appraisal
- Architectural
- Art
- Auction
- Automotive
- Barter Exchange
- BNI Professional
- Books
- Business
- Child Services
- Cleaning
- Coach
- Collectibles
- Computer
- Consulting
- Deliveries

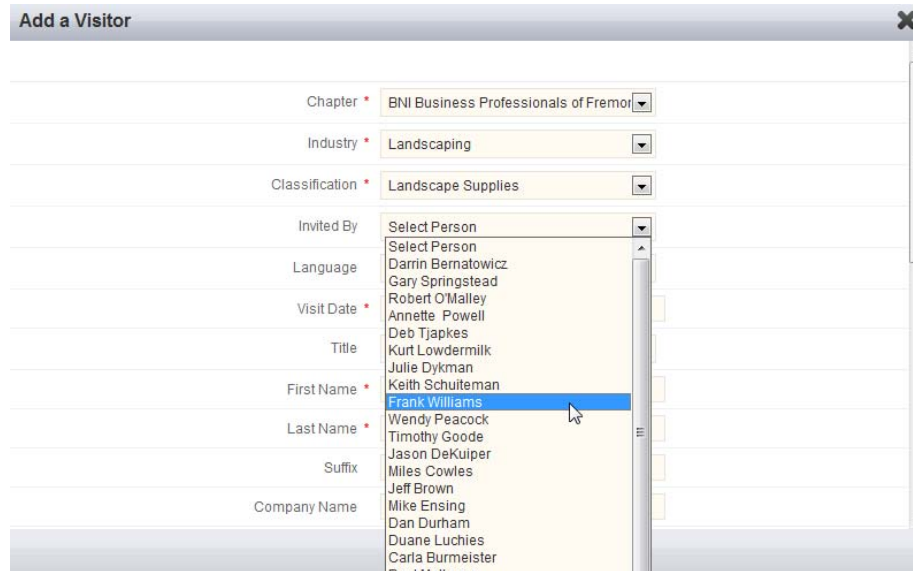
The "Select Industry" option is currently highlighted in blue.

Select Industry		
Accounting	Engraving	
Administrative	Entertainment	
Advertising	Environmental	
Agricultural	Equipment	
Animals	Event Planning	
Apparel	Facilities	
Appearance	Financial	Non-Profit Organization
Appliances	Flowers	Office
Appraisal	Food/Beverages	Organizing
Architectural	Fuels	Other
Art	Funeral	Personal Services
Auction	Furniture	Pest Control
Automotive	Gifts	Photography
Barter Exchange	Glass	Printing
BNI Professional	Graphic Design	Public Relations
Books	Health & Wellness	Real Estate
Business	Information Technology	Recreation
Child Services	Insurance	Security
Cleaning	Interior	Signs
Coach	Jewelry	Speaking
Collectibles	Landscaping	Sports
Computer	Language	Telecommunications
Consulting	Legal	Trades
Deliveries	Mail Services	Transportation
Educational	Marketing	Travel
Electronics	Media	Unknown
Embroidery	Medical	Wedding
Employment	Mortgage	Window
Engineering	Moving & Storage	Writing Services

5. When the Industry is entered the appropriate **Classifications** display. I'll choose **Landscape Supplies**

The screenshot shows a web form titled "Add a Visitor". The "Chapter" dropdown is set to "BNI Business Professionals of Fremont". The "Industry" dropdown is set to "Landscaping". The "Classification" dropdown is open, showing a list of options: "Select Classification", "Landscape Contractors", "Landscape Design", "Landscape Maintenance", "Landscape Products", "Landscape Services", "Landscape Supplies", "Lawn Care", "Snow Removal", and "Trees". The "Landscape Supplies" option is highlighted with a blue background and a mouse cursor. Other fields like "Invited By", "Language", "Visit Date", "Title", "First Name", "Last Name", "Suffix", and "Company Name" are present but empty. At the bottom, there are "Submit" and "Close" buttons.

6. Clicking on the **"Invited By"** dropdown automatically presents a list of all the chapter members. Pick one.



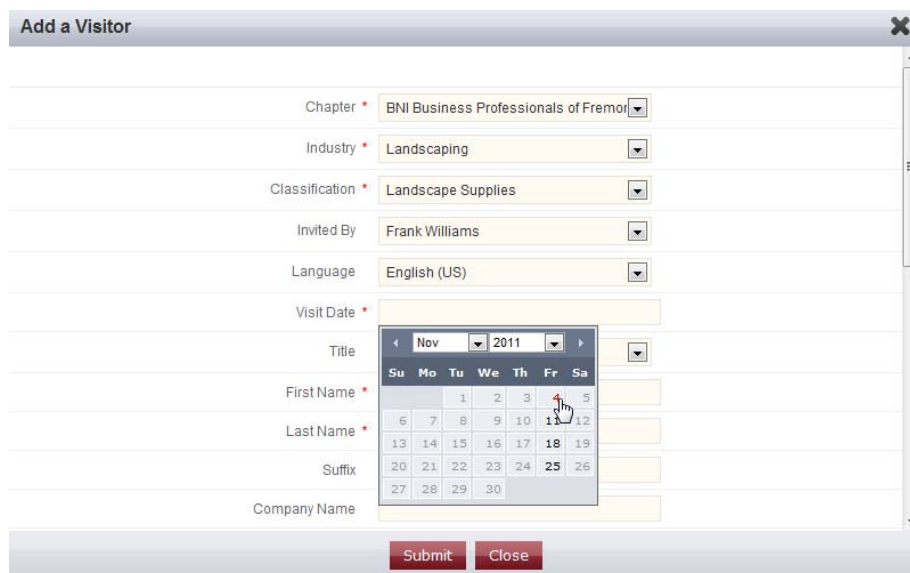
The screenshot shows the 'Add a Visitor' form with the following fields and values:

- Chapter: BNI Business Professionals of Fremont
- Industry: Landscaping
- Classification: Landscape Supplies
- Invited By: Select Person (dropdown menu is open)
- Language: English (US)
- Visit Date: (empty)
- Title: (empty)
- First Name: Keith Schuiteman
- Last Name: Frank Williams (highlighted)
- Suffix: (empty)
- Company Name: (empty)

The dropdown menu for 'Invited By' contains the following names:

- Select Person
- Darrin Bernatowicz
- Gary Springstead
- Robert O'Malley
- Annette Powell
- Deb Tjapkes
- Kurt Lowdermilk
- Julie Dykman
- Keith Schuiteman
- Frank Williams (highlighted)
- Wendy Peacock
- Timothy Goode
- Jason DeKuiper
- Miles Cowles
- Jeff Brown
- Mike Ensing
- Dan Durham
- Duane Luchies
- Carla Burmeister
- Paul Malton

7. Clicking on the **Visit Date** area opens a calendar with your chapter's meeting dates bolded. Click on the appropriate date.



The screenshot shows the 'Add a Visitor' form with the following fields and values:

- Chapter: BNI Business Professionals of Fremont
- Industry: Landscaping
- Classification: Landscape Supplies
- Invited By: Frank Williams
- Language: English (US)
- Visit Date: (empty)
- Title: (empty)
- First Name: (empty)
- Last Name: (empty)
- Suffix: (empty)
- Company Name: (empty)

The calendar for November 2011 is open, showing the following dates:

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

The dates 18 and 25 are bolded, indicating meeting dates. A mouse cursor is pointing to the date 11.

Buttons: Submit, Close

8. Type in the visitor's First Name, Last Name, and Company Name.

The screenshot shows the 'Add a Visitor' form with the following data entered:

Chapter *	BNI Business Professionals of Fremont
Industry *	Landscaping
Classification *	Landscape Supplies
Invited By	Frank Williams
Language	English (US)
Visit Date *	11/04/2011
Title	Select Title
First Name *	Fred
Last Name *	Flinstone
Suffix	
Company Name	Bedrock Quarry

9. Drag the scroll bar down and complete as much of the remaining information as you can. A phone number is required; an email address is very helpful, both now and when you convert the visitor to a member. When you are finished, click **Submit**

The screenshot shows the 'Add a Visitor' form with the following data entered:

Company Name	Bedrock Quarry
Address Line 1	123 Rubble Way
Address Line 2	
City	Bedrock
State / County / Province	MI
Country *	United States
Zip / Postal Code	43210
Phone *	123-456-7890
Mobile No.	234-567-8901
Fax	345-678-9012
Email	fred@bedrock.com
Notes	

10. You will see the following message

The screenshot shows the 'Add a Visitor' form with a success message:

Your form has been submitted successfully