



## QUICK START GUIDE MY BNI BUSINESS

Business Areas as listed on BNI Connect:

### Received & Given Information Totals

ITEM	Last 12 Months	Lifetime
<b>TYFCB Received: (Thank you for closed business received)</b>	8580	8580
<b>Referrals Received: (Referrals Received from Members)</b>	33	73
<b>TYFCB Given: (Thank you for closed business you give)</b>	11900	45705
<b>Referrals Given: (Referrals you have given)</b>	48	230
<b>Visitor: (Visitors you invited and attending a BNI meeting)</b>	5	15
<b>One to Ones: (Dance Cards)</b>	81	126
<b>CEUs: (Chapter Education Units that have been earned)</b>	58	58

### Information Entry and Reports

<a href="#">Enter TYFCB (Thank you for closed business)</a>
<a href="#">Enter Referrals (BNI Referral Slip)</a>
<a href="#">Enter One to Ones (One-to-one follow up)</a>
<a href="#">Enter CEUs (Chapter Education Units)</a>
<a href="#">Referral Tracking Sheet</a> <a href="#">Referral Tracking Sheet</a>
<a href="#">My TYFCB (My TYFCB Given Report)</a>
<a href="#">My Referrals (Referrals Given Report)</a>
<a href="#">My One to Ones (One to One Report)</a>
<a href="#">My CEU (Chapter Education Report)</a>
<a href="#">Referral Tracking Report (Referral Tracking Report)</a>
<a href="#">Personal Meeting Activity (Personal Meeting Activity Sheet)</a>

### EXAMPLE: SUBMIT A REFERRAL ONLINE (to submit TYFCB, 121s or CEUs select the appropriate link)

1. Click on Enter Referral
2. Date and Member giving a referral will automatically be listed at the top left corner of the page
3. Select a member in your chapter from the Drop Down Box or choose "Search Cross Chapter" for a member In another chapter
4. Referral – Name of Company/Person (Example) Tonto and the Boys
5. Referral Type – Within the chapter or out of chapter
6. Referral Status – Given your card or Told them you would call
7. Address, Telephone, Email
10. Comments (Example) Looking for an expert in the construction of Teepees
11. How hot is this referral (choose between 1 & 5 - 1 being tepid and 5 being hot )
12. Submit

### You have 3 options on the bottom of your screen:

**Save and New** - this saves the referral and allows member to automatically add another referral – all referrals can be submitted after all entries.

**Submit** - this automatically send the information to the recipient of the referral.

**Close** - changed your mind and not sending referral.