

Thanking your referral sources 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 by following these few simple steps.

## Log Into BNI Connect and Choose Submit Referral Slips

Happy Connecting **Jeremy Walsh**

Regional Website  
Options

NETWORK OPERATIONS REPORTS TOOLS ADMIN 114

Antarctica Shiver Region BNI - Brrrr (Wed-In Person)

Happy Connecting! 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 Renewal Due Date: Suspended

My BNI® Business totals are updated only after PALMS reports are submitted by the VP. My Reports reflect all slips immediately. Please Note: The personal information in the My BNI® Business module and online slips can only be viewed by the member entering the slips. This information is never stored or used for any purpose by BNI®.

	Last 12 Months	Lifetime
Revenue Received To My Business:	1192623	6479212
Referrals Received:	21	596
TYFCB Given:	62118	1262746
Referrals Given:	28	614
Visitor:	0	90
One-to-Ones:	59	715
CEUs:	69	1361

- Submit TYFCB Slips
- Submit Referral Slips
- Submit One-to-One Slips
- Submit CEU Slips
- Track Your Referrals Received Online
- Review My TYFCB Slips

After logging into BNI Connect, click on Submit Referral Slips

## Complete the Referral Slip Entry

Submit Referral Slips

**BNI® Referral Slip (Be Sure To Announce This At The Meeting)**

Date: 05/12/2022 | From: Jeremy Walsh

To \* Please select from dropdown below or search cross chapter

Select a member from your chapter 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

Changing the Way the World Does Business®

Submit and New Submit Close

1. Choose your fellow chapter member from the drop down list whom you would like to thank for the closed business.

2. <OR> you may search for a member to thank by clicking on "Search Cross Chapter".
3. Enter the business and/or contact name
4. A Tier 1 (inside referral) means that you need to use the other member's business for personal needs, a self referral. A Tier 2 (outside) referral means you are introducing them to someone else that needs their services.
5. Given Your Card indicates that the referral will be calling them. Told them you would call indicates that the member should initiate contact.
6. Enter the Address, Phone, and Email details, and any comments for the referral
7. Choose how "hot" the referral is
8. Submit your referral

## Searching Cross Chapter

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

Select a member from your chapter  **1** **Search Cross Chapter**

the amount of: \*

Always use local currency.

### BNI Connect - Local Business - Global Network

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

First Name  **2**

Last Name  **3**

Company  **4**

**Search** **Reset** **Back**

**5** **6** **7**

1. Clicking on the Search Cross Chapter button will allow you to search for another member in your region.
2. Enter at least the first two characters of the First Name.
3. <And\Or> Enter at least the first two characters of the the Last Name.
4. <And\Or> Enter at least the first two characters of the Company Name.
5. Click Search to find the member.
6. Click Reset to clear your search and begin a new search.
7. Click Back to cancel the search and return to the slip.

### Select the Member From the Search Results

To search for other users and members you must input a

fields.

First Name Darth

Last Name V

Company

Search Reset Back

Once you have verified the member details, click the round icon next to the name to select this member

Show 10 entries

Search:

	Chapter	Company	Specialty	
<input type="radio"/>	Darth Vader	BNI - Brrrr (Wed-In Person)	Star Wars IV	Personal Services (Other)

Showing 1 to 1 of 1 entries

Submit Referral Slips

BNI® Referral Slip (Be Sure To Announce When Meeting)

The member name will now appear on the form

Date: 05/12/2022 | From: Jeremy Walsh

To Darth Vader

Select a member from your chapter OR Search Cross Chapter

Referral Luke Skywalker

Referral Type Tier 1 (inside) Tier 2 (outside)

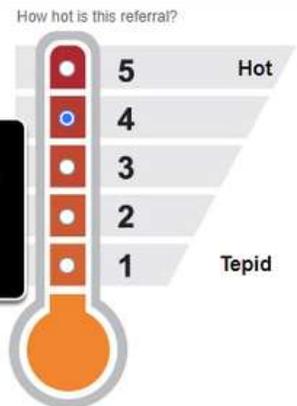
Referral Status Given your card Told them you would call

Address In Between Planets

Telephone 999999

Email luke@skywalker.com

Comments Needs assistance with corporate restructuring



Once you have completed the form, choose your option to continue

Changing the Way the World Does Business®

Submit and New Submit Close

For Your Records....

- My Network
- Chapter Shortcuts
- Region Shortcuts
- Country Shortcuts
- HQ Shortcuts

Configure

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personal information in the My BNI® Business module and online slips can only be viewed by the member entering the  
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	Last 12 Months
Revenue Received To My Business:	1192623
Referrals Received:	21
TYFCB Given:	62118
Referrals Given:	28
Visitor:	
One-to-Ones:	
CEUs:	

- [Submit TYFCB Slips](#)
- [Submit Referral Slips](#)
- [Submit One-to-One Slips](#)
- [Submit CEU Slips](#)
- [Track Your Referrals Received Online](#)
- [Review My TYFCB Slips](#)
- [Review My Referral Slips](#)
- [Review My One-to-One Slips](#)
- [Review My CEU Slips](#)
- [Received Referrals Report](#)

Your weekly activity will be available through the Review My Referral Slips and Print Your Weekly Slips. Once your VP has submitted the weekly PALMS, it will be included in your Referrals Given 12 month and lifetime metrics.

Happy Connecting!