VISITOR HOST
ADDING VISITORS & SENDING EMAILS
QUICK START GUIDE

To make the function of being a Visitor Host easier, Inviting Members need to be accountable for walking the visitor through the registration process.

Why? The inviting member has the common language to walk a visitor through the process.

The members should know their respective Chapter Web Page and have the visitor click on the Visit Us button.

After the visitor completes this, they will get automated reminders, reminders do not remove the member's responsibility to reach out.

HOW TO MARK VISITOR ATTENDANCE

Operations> Manage Visitors> Visitor Registration and Attendance Portal> Mark Attendance> Enter Dates> Choose Visitor (Click Check Box to Left of Name)> Fill In Missing Info (if Possible)> Click Mark Attendance (at bottom of screen)

 Or

1. Operations
2. Manage Visitors
3. Visitor Registration and Attendance Portal
4. Mark Attendance
5. Enter Dates (top of page)
6. Choose Visitor (Click checkbox to Left of Name)
7. Review Information (Fill in gaps if possible)
8. Review Attendance
9 Click Mark Attendance (at bottom of screen)

HOW TO ENTER A CHAPTER
VISITOR (if member does not get visitor registered)

Operations>Chapter>Manage Visitors>Visitor Registration and Attendance Portal>Add Visitor Information>Save Registration (located at top of screen)
Or
1. Operations
2. Chapter
3. Visitor Registration and Attendance Portal
4. Add Visitor Information
5. Input Information
6. Save Registration

EMAIL TO CHAPTER VISITORS (gives an email list of visitors for you to email)

Operations> Create Email> Email Chapter Visitors> Add Dates> Next> Copy and Paste into an Email created in your Email Client

Or

1. Operations
2. Create Email
3. Email Chapter Visitors
4. Add Dates (Top of Page)
5. Should you want to start over press Reset at the bottom of the screen.
6. If everything is the way you want it click Next (lower Right Corner)
7. Copy & Paste email address into an Email created in your Email Client

EMAIL VISITOR CHAPTER INVITATION

Operations>Chapter>Create Email>
Email Visitor Invitation>Add Information>Send

Or

1. Operations
2. Chapter
3. Create Email
4. Email Visitor Invitation
5. Add Information
6. Send