

BNI Member Database

September 2007



248-225-2915

tepatosystems.com

Table of Contents

Recordkeeping for your Chapter Membership & Referrals	3
Main Menu.....	4
Enter Your Meeting Dates	5
Enter Your Members	6
Record Absences	7
Record Referrals	8
Record Visitors	9
Reports.....	10
Reports.....	10
Information or Assistance	12

Recordkeeping for your Chapter Membership & Referrals

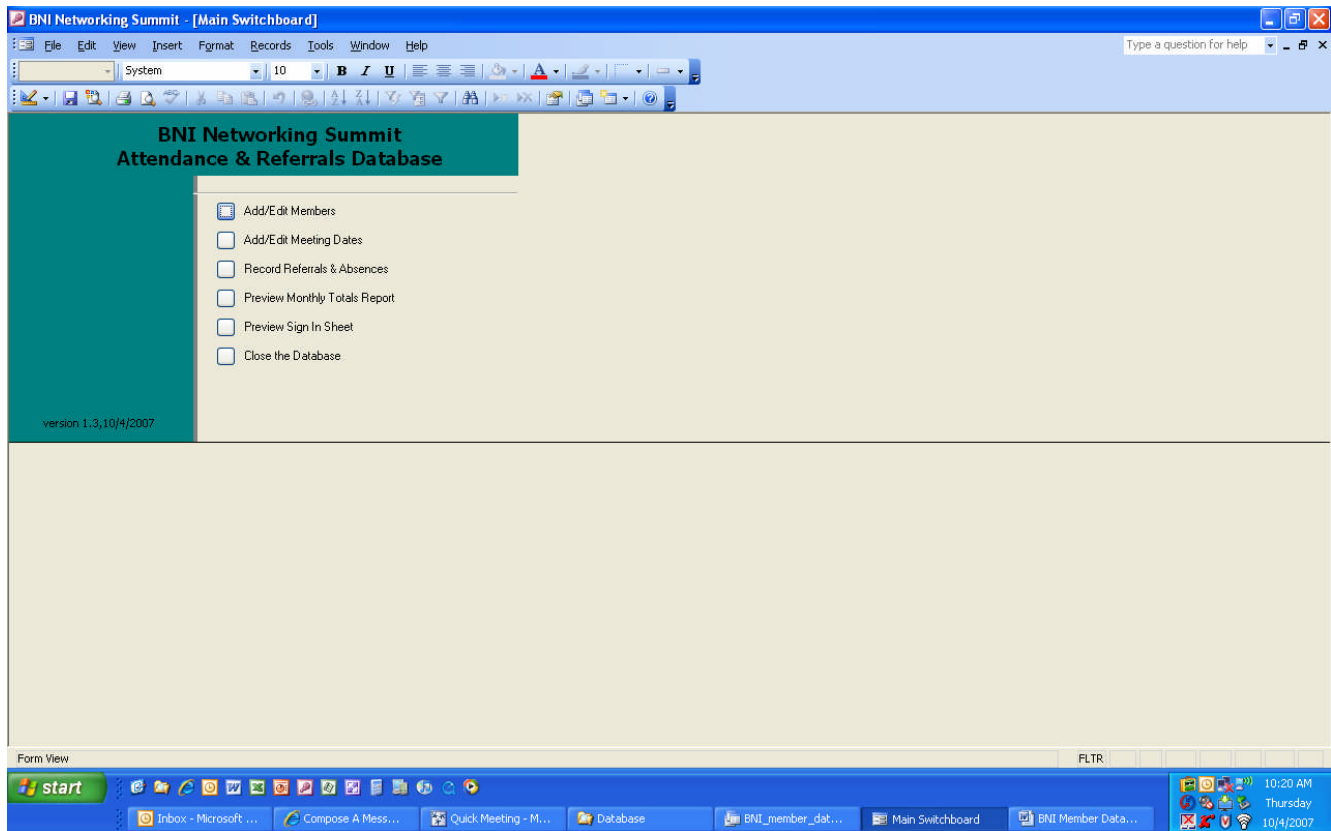
Every BNI Chapter has weekly meetings where the members pass referrals. To keep track of member attendance as well as all of the referrals is a big job. Normally this administration is done by the Vice President, but it could be performed by any member.

Tepato Systems has a database to help you with all of this data. You can enter member names, along with their company names. Once you've entered all of your meeting dates, you can quickly record member absences and all of the referrals passed each week. All of your information is in one place, so it is easy to maintain, and you can find what you need quickly. A single volunteer can handle both the attendance and referrals, as well as produce the weekly report for review during the meeting.

With the BNI member database, you can perform all of the tasks needed to administer your chapter:

- Record member name and company name
- Record weekly absences
- Record weekly referrals given and received
- Record visitors brought by members
- Mark members as inactive when they leave the chapter
- Create report for each weekly meeting that shows all of the absences and referrals by week for the entire month
- Create Sign In Sheet for weekly meeting
- Tepato Systems can also add custom letters for each absence (using the suggested verbiage from BNI)

Main Menu



This is the Main Menu that appears when you open the database. You have all of the following options:

- Add/Edit Members
- Add/Edit Meeting Dates
- Record Referrals & Absences
- Preview Monthly Totals Report
- Preview Sign In Sheet
- Close the Database

Each function (except close) has a section in this guide.

Enter Your Meeting Dates

Add/Edit Meeting Dates

Meeting Date	Week (of month)
9/27/2007	4
9/20/2007	3
9/13/2007	2
9/6/2007	1
8/30/2007	5
8/23/2007	4
8/16/2007	3
8/9/2007	2
8/2/2007	1
7/26/2007	4
7/19/2007	3
7/12/2007	2
7/5/2007	1
6/28/2007	4
6/21/2007	3
6/14/2007	2

Record: 1 of 28
Form View

start | Inboxes - Microsoft ... | Login - Windows In... | SCI Auction Datab... | Copy of BNI_mem... | Main Switchboard | frmMeetings | BNI Member Datab...

11:42 AM
Friday
9/28/2007

Open the “Add/Edit Meeting Dates” screen from the Main Menu. You can enter several months’ worth of meeting dates all at once, then use them throughout the database.

Even if your meeting date falls on a holiday and there won’t be a meeting, you can still enter it as a meeting date. It should still appear on the Monthly Totals Report with zeroes/spaces (no data). Without that date, your report might look odd (as if you skipped a week).

Enter Your Members

The screenshot shows a web-based form titled "Add / Edit Members" within a browser window. The form is used to enter or update member information. The fields are as follows:

Field	Value
First Name	Marzen
Last Name	Baldonado
Company	The Nezram Group
Website	
Business Phone	248-797-5205
Mobile Phone	248-797-5205
Join Date	5/3/2007
Membership End Date	9/30/2007

Below the fields, a note states: "Please note - enter the last day of the month that the member leaves the chapter".

The form is displayed in a window titled "BNI Networking Summit - [frmMember]". The window includes a menu bar (File, Edit, View, Insert, Format, Records, Tools, Window, Help) and a toolbar. The status bar at the bottom shows the current date and time: "10/4/2007 10:18 AM".

Open the “Add/Edit Members” screen from the Main Menu. You can record the member’s name, company name, phone numbers, join date and website.

Please note – when a member leaves, you’ll come back to this screen, find the member’s record, and enter a date in the Membership End Date field. Please enter the last day of the month that the member leaves, so that they’ll appear on your reports correctly for that month. After that month is over, they’ll no longer appear on your report.

BNI Networking Summit - [frmDataEntry]

File Edit View Insert Format Records Tools Window Help

Type a question for help

Member Attendance & Referrals

Absences Referrals Visitors

MbrID	MtgID	Absent	Late	Sub
Bova	6/7/2007	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Smith	6/7/2007	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Girdis	6/7/2007	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Stachura	5/31/2007	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Snider	5/31/2007	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ross	5/24/2007	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Girdis	5/24/2007	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Malkiewicz	5/24/2007	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Bury	5/24/2007	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Snider	5/24/2007	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Shively	5/24/2007	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lovett	5/24/2007	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Stachura	5/17/2007	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shively	5/17/2007	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
McCann	5/17/2007	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Baldonado	5/17/2007	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Girdis	5/17/2007	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Beamish	5/3/2007	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Bannerman	5/3/2007	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Smith	5/3/2007	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Record: 1 of 35

Form View

start

Inbox - Microsoft O... Login - Windows In... SCT Auction Database Copy of BNI mem... Main Switchboard frmDataEntry BNI Member Datab...

11:55 AM Friday 9/28/2007

To record absences, click on the Absences tab. Select the member from the pick list, then select the meeting date. Click on the appropriate check box if they were absent, late or had a sub. If they were totally absent, the database will count that as “1” absence in the totals. If they were late, it will count as 1/3 of an absence in the totals. If your chapter has a different policy, those calculations can be changed. A member who has a sub does not have an absence counted against them in the totals.

Record Referrals

Member Attendance & Referrals

Absences | **Referrals** | Visitors

RefDate	MbrID	Give	Receive
8/9/2007	Z BNI Networking Sumr	0	1
8/9/2007	Tieppo	2	0
8/9/2007	Ross	0	1
7/26/2007	Driskell	0	3
7/26/2007	Girdis	1	0
7/26/2007	Shively	1	0
7/26/2007	Bury	1	0
7/19/2007	Shively	0	1
7/19/2007	Driskell	0	1
7/19/2007	Shively	1	0
7/19/2007	Bury	1	0
7/12/2007	Driskell	0	1
7/12/2007	Shively	0	1
7/12/2007	Bury	1	0
7/12/2007	Bury	1	0
6/7/2007	Lamb	0	1
6/7/2007	Malkiewicz	1	1
6/7/2007	Osborne	2	3
6/7/2007	Shively	2	2
6/7/2007	Kwek	0	2

Record: 1 of 157

Open the “Record Referrals & Absences” screen from the main menu. There are several tabs – one for Absences, one for Referrals and one for Visitors.

To record referrals, click on the Referrals tab. Select the member from the pick list, then select the meeting date. Enter the number of referrals given and received for the selected meeting. If a member did not give or receive a referral for that week, you don’t need to record anything for them.

Please note – referrals for visitors or dance cards are technically “given” to the chapter, so you’ll select “Z Chapter Name” as the member. If a Guest receives or gives a referral, you can select “Z Guest” as the member. The “Z” in front of the name is just to force it to the bottom of the list when sorted alphabetically.

Record Visitors

The screenshot shows a Windows XP desktop with the application "BNI Networking Summit - [frmDataEntry]" open. The application window has a menu bar (File, Edit, View, Insert, Format, Records, Tools, Window, Help) and a toolbar. Below the menu bar, there's a status bar showing "MbrID: Arial" and "10". The main area is titled "Member Attendance & Referrals" and has three tabs: "Absences", "Referrals", and "Visitors". The "Visitors" tab is selected, displaying a table with the following data:

MbrID	MtgID	VisitorName
Kirkish	6/7/2007	John Kirkish-Safehouse
Kwek	6/7/2007	Norma Kwek-Arbonne
Z BNI Netwo	6/7/2007	Carl Pittner-Goddard School
Osborne	6/7/2007	Mike Shedd-Bancard Corp.
Lovett	5/31/2007	Susan Towne-State Farm
Lovett	5/24/2007	Susan Towne-State Farm
Ross	5/17/2007	Jacqui Lamb - Massage Therapist
Z BNI Netwo	5/17/2007	Rick B. - AutoLab
Z BNI Netwo	5/10/2007	Rocky Johnson - AutoLab
Baldonado	5/10/2007	Maria Baldonado - Ludwig Seeley
Bergeron	5/10/2007	Jeff Baker, Pat Carlson - Image Custom Carpentry
Z Guest	5/10/2007	Brian Bova (invited by visitor Jeff Baker) - Bova Electric
Malkiewicz	5/10/2007	Jeanne Marie Miller - CoCo's Chocolate
Bergeron	5/3/2007	Jeff Baker, Pat Carlson-Image Custom carpentry
Osborne	5/3/2007	William Johnson-Citizens Bank
Lovett	5/3/2007	Dave Jacek-Metro. Lincoln Mercury

At the bottom of the table, there's a status bar showing "Record: 1 of 16". The Windows taskbar at the bottom shows the Start button, several open applications (Calendar - Microsoft..., Login - Windows In..., SCT Auction Database, Copy of BNI_memb..., Main Switchboard, frmDataEntry, BNI Member Datab...), and the system clock showing "11:57 AM Friday 9/28/2007".

Open the “Record Referrals & Absences” screen from the main menu. There are several tabs – one for Absences, one for Referrals and one for Visitors.

To record visitors, click on the Visitors tab. Select the member from the pick list, then select the meeting date. Enter the name and company of the visitor in the field.

Reports

Monthly Totals

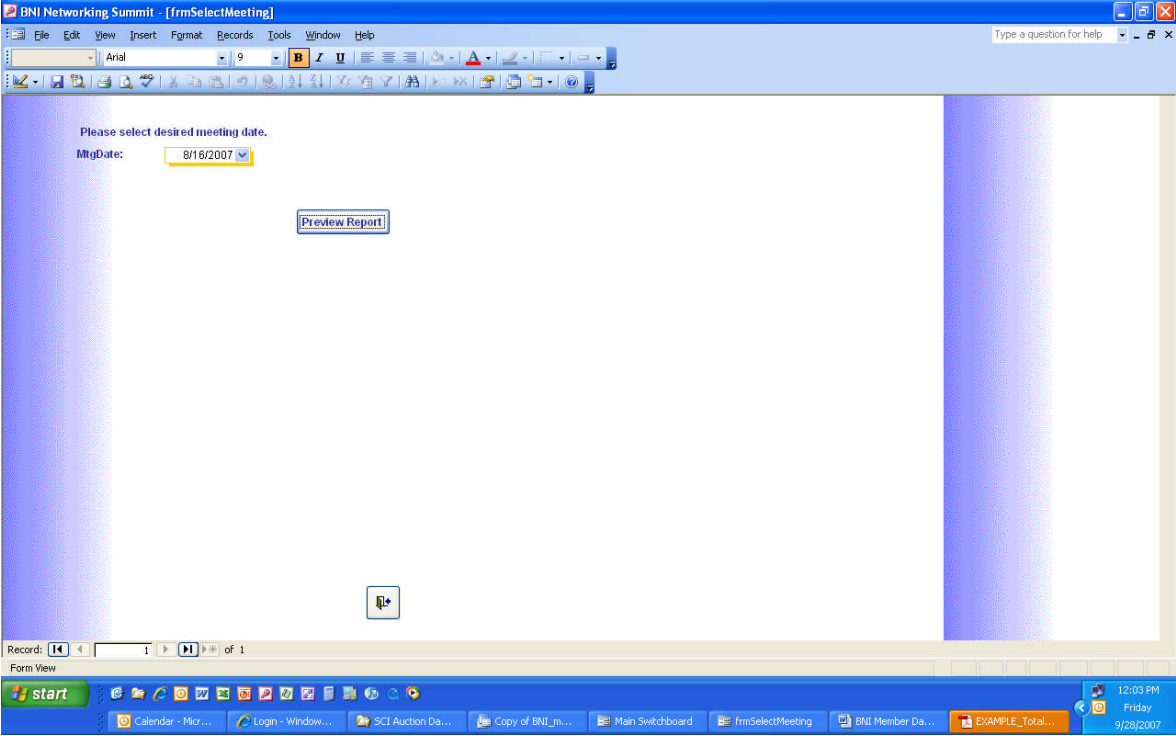
To create the report of the total referrals and absences for the month, click on “Preview Monthly Totals Report” on the Main Menu.

The screen above will open. Enter a date range in the fields provided (normally the first and last day of the month). The report will automatically be selected for the April – September term or the October – March term. Click on “preview report” and it will be displayed.

[illegible]

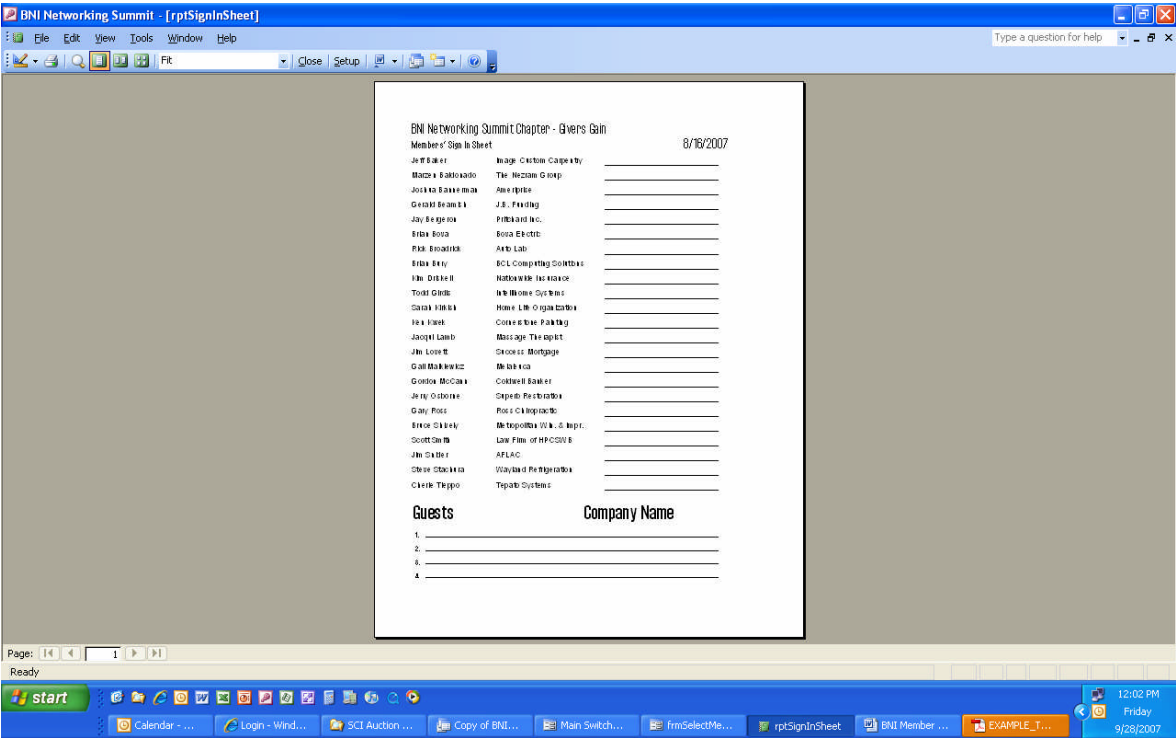
You can print the report from this screen, or you can export it to a PDF (for emailing, if needed).

Sign In Sheet



To create a weekly Sign In Sheet, click on “Preview Sign In Sheet” on the Main Menu.

The screen above will open. Select a meeting date using the pick list and then click on “preview report” to display it.



Information or Assistance

For more information, please contact Tepato Systems:

Business phone: 248-225-2915

Website: tepatosystems.com