

SGI-USA ORGANIZATION MEMO

DATE: APRIL 22, 2020

MEMO: 2020-ORG-046



DISTRIBUTE TO: District Through National Leaders, Zone and Territory Offices
FROM: SGI-USA Organization Center
SUBJECT: **District Guest List Tool in SGI-USA Member Portal**

Hello District through National Leaders!

SGI-USA has launched an online district guest list tool via the SGI-USA Member Portal, allowing all district through national leaders to build and manage guest lists at the district level. Leaders will have access to a complete list of all guests tied to a specific district, along with guest and sponsor information. Additionally, leaders will be able to check off the following four (4) critical components for guests:

- Is Chanting Consistently
- Wants to Become a Member
- Has Met the Gohonzon Conferral Guidelines (see chapter 1, page 12 of the SGI-USA Leadership Manual)
- **Include in Mailing List (SGI-USA will send introductory materials and resources via email)**

Annually, over 30,000 guests attend discussion meetings in SGI-USA. Thus, the purpose of this tool is to create a method for better guest care and follow-up. Additionally, although we are not holding physical activities due to COVID-19, many guests are attending SGI-USA sponsored virtual meetings and are expressing an interest in chanting and learning more about who we are. Thus, the following are required fields regarding a district guest list:

- Guest Full Name
- Guest Email
- Guest Division
- Sponsor Full Name
- Sponsor Email

Leaders will NOT be able to add a guest if any of these required fields are left blank. Although we are capturing guest information, **no guest should be contacted without their expressed consent**. See the official SGI-USA Privacy Statement below:

SGI-USA PRIVACY STATEMENT

SGI-USA is committed to protecting individual privacy rights and considers information contained in the SGI-USA Membership Information System (MIS) to be confidential. The information shall only be used for internal, data management purposes. Maintaining an accurate membership database is the sole purpose of MIS, and no data or information contained herein shall be sold or transferred to outside parties.

Additionally, users are not authorized to share or store the data using online applications, such as Google docs. Violation of this policy is strictly prohibited and shall be cause for removal of access to statistics.

Attached to this memo are the basic instructions on how district through national leaders can build and manage guest lists via the SGI-USA Member Portal.

Thank you very much!

STEP 1

District through National leaders log into their Member Portal account:

<https://portal.sgi-usa.org/portal> and (1) click the "For Leaders" tab; (2) click "Leadership Management" and (3) click "District Guest List"

The screenshot shows a navigation menu with the following items: My Account, My Contributions, My Subscriptions, My FNCC Conferences, My Exams, and For Leaders. The 'For Leaders' tab is highlighted with a red box and a circled '1'. Below it, the 'Leadership Management' menu item is highlighted with a red box and a circled '2'. Under 'Leadership Management', the 'District Guest List' item is highlighted with a red box and a circled '3'. At the bottom of the menu, 'Exam Management' is visible with a downward arrow.

My Account	My Contributions	My Subscriptions	My FNCC Conferences	My Exams	For Leaders
Leadership Management ^					
Home Visits					
Leadership Appointments					
March 2020 Youth Discussion Meeting Attendance					
District Guest List					
Exam Management v					

STEP 2

In the auto suggest District box, begin entering and then select the name of the District you wish to add a guest to and click "Select"

District Guest List

District **1** ×

- Austin-Killeen Region / Austin Central Chapter / Del Valle District
- Austin-Killeen Region / Austin Central Chapter / Delwood District**
- Austin-Killeen Region / Austin Central Chapter / Hyde Park District
- Austin-Killeen Region / Killeen West Chapter / Hughes Garden District

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STEP 3


To add a guest to your District Guest List, click "Add New Record"

District Guest List

District

SELECT

Delwood District (Number Of Guests: 1)

No.	Guest Full Name	Division	Email	Phone	Sponsor Full Name	Sponsor Email	Sponsor Phone	Is Chanting Consistently	Wants to Become a Member	Has Met Gohonzon Conferral Guidelines	Include in Mailing List	Action (Edit/Delete)
1	Buddha Bob	YMD	guest@msn.com	555-555-5555	John Hancock	sponsor@msn.com	555-555-5555	✓	✓		✓	 

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ADD NEW RECORD

STEP 4

When adding a guest, make sure to fill in the required fields (*) and then check off any of the following that pertain to the guest:

- (1) Is chanting consistently
- (2) Wants to become a member
- (3) Has met Gohonzon conferral guidelines
- (4) Include in mailing list

To finalize, click "Save"

Create District Guest

FIRST NAME *

EMAIL *

DIVISION *

SPONSOR FIRST NAME *

SPONSOR EMAIL *

LAST NAME *

PHONE

DISTRICT NAME *

SPONSOR LAST NAME *

SPONSOR PHONE

1 Is Chanting Consistently

2 Wants to Become a Member

3 Has Met Gohonzon Conferral Guidelines

4 Include in Mailing List

CANCEL

SAVE

STEP 5

Leaders will have access to a complete list of all guests tied to a specific District, along with guest and sponsor contact information. Additionally, leaders will also be able to view the following key information:

- (1) Is chanting consistently
- (2) Wants to become a member
- (3) Has met Gohonzon conferral guidelines
- (4) Include in Mailing List

From this page, leaders can either edit or delete a guest as well as add a new record (guest)

District Guest List

District

SELECT

Delwood District (Number Of Guests: 2)

No.	Guest Full Name	Division	Email	Phone	Sponsor Full Name	Sponsor Email	Sponsor Phone	Is Chanting Consistently	Wants to Become a Member	Has Met Gohonzon Conferral Guidelines	Include in Mailing List	Action (Edit/Delete)
1	Buddha Bob	YMD	guest@msn.com	555-555-5555	John Hancock	sponsor@msn.com	555-555-5555	✓	✓	✓	✓	 
2	Sally Smith	YWD	ywdguest@msn.com		Jennifer Johnson	WDsponsor@msn.com	555-555-5555	✓	✓	✓	✓	 

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ADD NEW RECORD

No.	Chapter	District	Guest Full Name	Division	Email	Phone	Sponsor Full Name	Sponsor Email	Sponsor Phone	Is Chanting Consistently	Wants to Become a Member	Has Met Gohonzon Conferral Guidelines	Include in Mailing List
1	Austin Central	Delwood	Buddha Bob	Young Men's Division	guest@msn.com	555-555-5555	John Hancock	sponsor@msn.com	555-555-5555	✓	✓		✓
2	Austin Central	Delwood	Sally Smith	Young Women's	ywdguest@msn.com		Jennifer Johnson	Wdsponsor@msn.com	555-555-5555	✓	✓		✓

STEP 6

Guest lists, from the District to National levels, will be available for download via our online statistics system. Here are the steps to run a guest list report:

1. Log into the SGI-USA online statistics system (www.statsrpt.org)
2. Click "Report" from the menu bar at the top of the screen
3. Click "Statistics Reports"
4. Click the report called "District Guest List"
5. Select the org unit you wish to run a guest list for and click "Run"

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