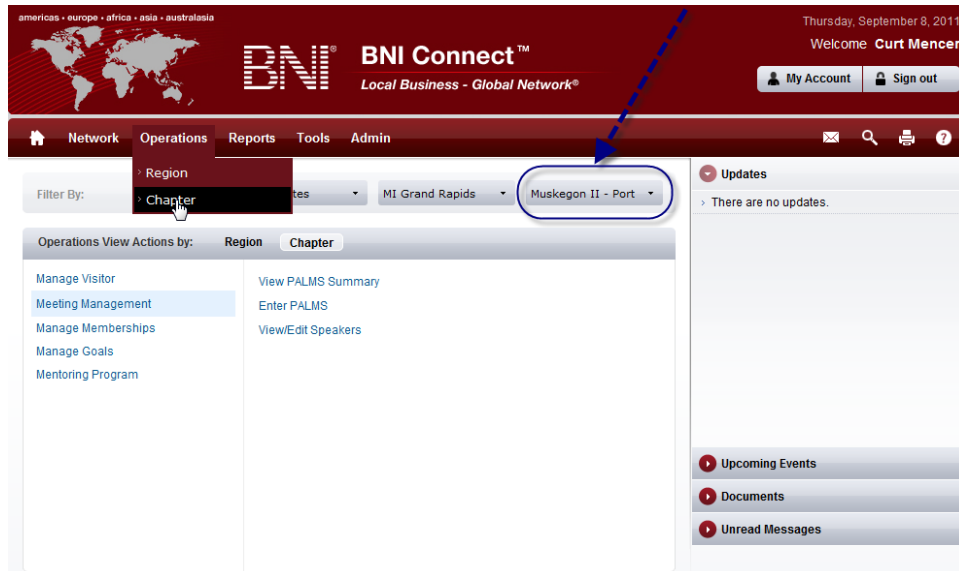
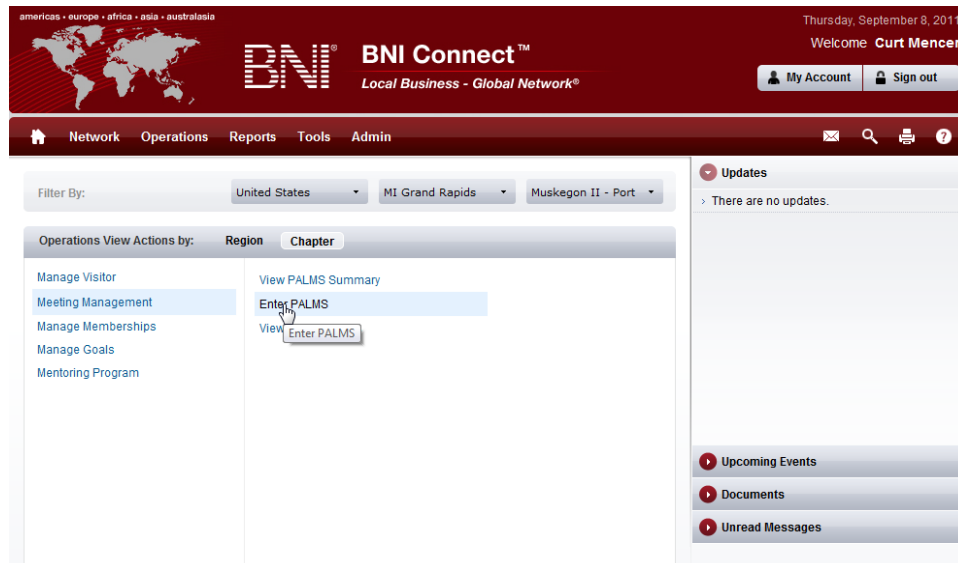


Entering and Editing PALMS Data In BNI Connect

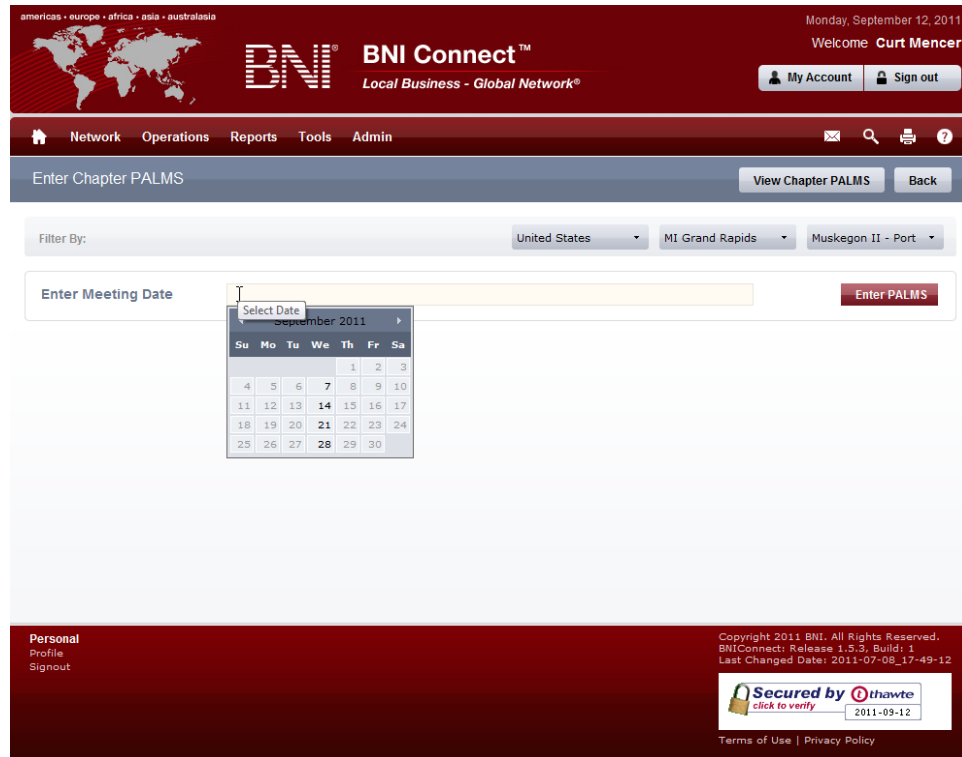
1. Under "**Operations**" click on "**Chapter**" Make sure your chapter name is visible in the chapter drop down.



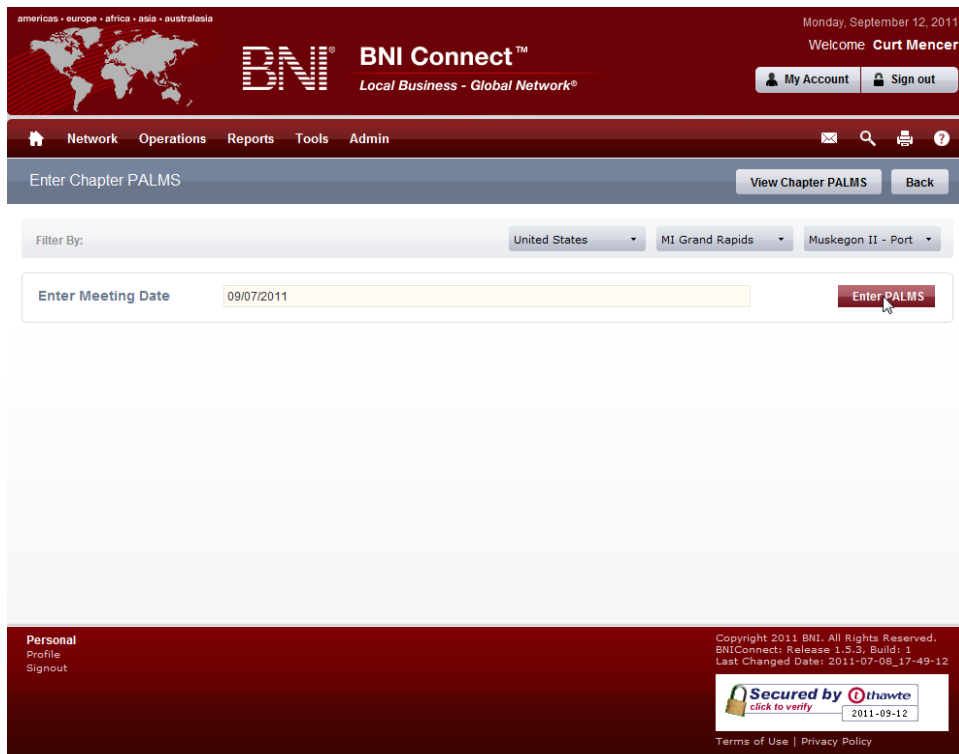
2. Under **Chapter** click on "**Meeting Management**" and then click on "**Enter Palms**"



- Click once in the box to the right of "**Enter Meeting Date**". A calendar will drop down with the available dates (your chapter meeting day) highlighted.



- Click on the date for which you wish to enter the PALMS report. That date will populate the "**Enter Meeting Date**" field. Then click on "**Enter Palms**".



5. A blank **PALMS Report** screen will appear

americas • europe • africa • asia • australasia

Monday, September 12, 2011
Welcome **Curt Mencer**

My Account Sign out

Network Operations Reports Tools Admin

Enter Chapter PALMS View Chapter PALMS Back

Filter By: United States MI Grand Rapids Muskegon II - Port

Enter Meeting Date 09/07/2011 Enter PALMS

Print PALMS Sheet

Member	PALMS	RGI	RGO	RRI	RRO	Visitors	121	TYFCB (whole amounts only)	CEU
Annette Vida	P	0	0	0	0	0	0	0	0
Bobby Anderson	P	0	0	0	0	0	0	0	0
Brenden Gibbs	P	0	0	0	0	0	0	0	0
Brian Ahern	P	0	0	0	0	0	0	0	0
Cameron Carr	P	0	0	0	0	0	0	0	0
Cathy Morin	P	0	0	0	0	0	0	0	0
Curt Mencer	P	0	0	0	0	0	0	0	0

6. If you are doing this **prior** to the meeting, print the blank report by clicking on "**Print Palms Sheet**".

americas • europe • africa • asia • australasia

Monday, September 12, 2011
Welcome **Curt Mencer**

My Account Sign out

Network Operations Reports Tools Admin

Enter Chapter PALMS View Chapter PALMS Back

Filter By: United States MI Grand Rapids Muskegon II - Port

Enter Meeting Date 09/07/2011 Enter PALMS

Print PALMS Sheet

Member	PALMS	RGI	RGO	RRI	RRO	Visitors	121	TYFCB (whole amounts only)	CEU
Annette Vida	P	0	0	0	0	0	0	0	0
Bobby Anderson	P	0	0	0	0	0	0	0	0
Brenden Gibbs	P	0	0	0	0	0	0	0	0
Brian Ahern	P	0	0	0	0	0	0	0	0
Cameron Carr	P	0	0	0	0	0	0	0	0
Cathy Morin	P	0	0	0	0	0	0	0	0
Curt Mencer	P	0	0	0	0	0	0	0	0

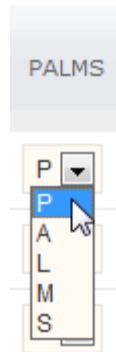
7. BNI Connect will produce a form for entering your PALMS data during the meeting.

Chapter Name: Muskegon II - Port City Professionals Meeting Date: 09/07/2011										
Member	PALMS	RGI	RGO	RRI	RRO	Visitors	121	TYFCB (whole amounts only)	CEU	
Annette Vida										
Bobby Anderson										
Brenden Gibbs										
Brian Ahern										
Cameron Carr										
Cathy Morin										
Curt Mencer										
Dave Hillis										
Don Vanderkool										
Eloy Martinez										
Erin Vanderwier										

8. If you are doing this *after* the meeting, begin to enter PALMS data in the appropriate column opposite the member's name. Continue entering data for each member.

Member	PALMS	RGI	RGO	RRI	RRO	Visitors	121	TYFCB (whole amounts only)	CEU
--------	-------	-----	-----	-----	-----	----------	-----	----------------------------	-----

a. The first column features a drop down with the following selections. Click on the appropriate letter:



- P** -- Present
- A** -- Absent
- L** -- Late
- M** -- Medical
- S** -- Substitute

b. Key In the appropriate Data in the remaining columns as defined below:

RGI	Inside Referral Given (Member to Member)	T1
RGO	Outside Referral Given (Member to Non-Member)	T2
RRI	Inside Referral Received (Member to Member)	T1
RRO	Outside Referral Received (Member to Non-Member)	T2
Visitors	Number of visitors attending with this member	
121	Number of 1 to 1 meetings initiated by this member	
TYFCB	Thank You For Closed Business credited to this member	
CEU	Number of Chapter Education Units earned by this member (training)	

c. Note: Always (every week) mark your Director "**Present**" (present is the default -- do not change it) so that your attendance percentages will be correct!

The screenshot shows a data entry form with a table. The table has columns for 'BNI', 'Visitor', and 'Total', and rows for various metrics. A dropdown menu is open over the 'P' column, showing options P, A, L, M, S. Below the table are buttons for 'Submit PALMS', 'Mark as Holiday', 'Save as Draft', and 'Discard PALMS'.

d. When you complete data entry, select one of options at the bottom of the screen:

If you are done and all data is correct, click	Submit PALMS
If your meeting date is a Holiday and the meeting is cancelled, click	Mark as Holiday
If you want to stop and complete the report later, click	Save as Draft
If you completely messed up and want to start over, click	Discard PALMS



e. After you select any of the options, you will get the opportunity to confirm your action:

The screenshot shows a table of PALMS data with a confirmation dialog box overlaid. The dialog box is titled "Message from webpage" and contains a question mark icon and the text "Are you sure you want to submit PALMS?". Below the text are two buttons: "OK" and "Cancel". The table in the background has columns for member names, dropdown menus, and numerical values. At the bottom of the table, there are four buttons: "Submit PALMS", "Mark as Holiday", "Save as Draft", and "Discard PALMS".

Member	Dropdown	0	0	0	0	0	0	0.00	0
Bobby Anderson	A	0	0	0	0	0	0	0.00	0
Brenden Gibbs	A	0	0	0	0	0	0	0.00	0
Brian Ahern	P	0	0	0	2	0	0	75.00	0
Cameron Carr	P	2	1	1	1	0	0	70.00	0
Cathy Morin	P	0	1	2	2	0	0	0.00	0
Curt Mencer	P	1	1	1	0	0	0	0.00	0
Dave Hillis	P	0						45.00	0
Don Vanderkooi	S	1						25.00	0
Eloy Martinez	P	2						410.00	0
Erin Vanderwier	L	2						0.00	0
Fredric Reinecke	L	0	1	1	0	0	0	0.00	0
Gary Spencer	P	1	0	3	0	0	0	0.00	0
Total		35	18	34	23	0	0	1779.00	0

Showing 1 to 34 of 34 entries

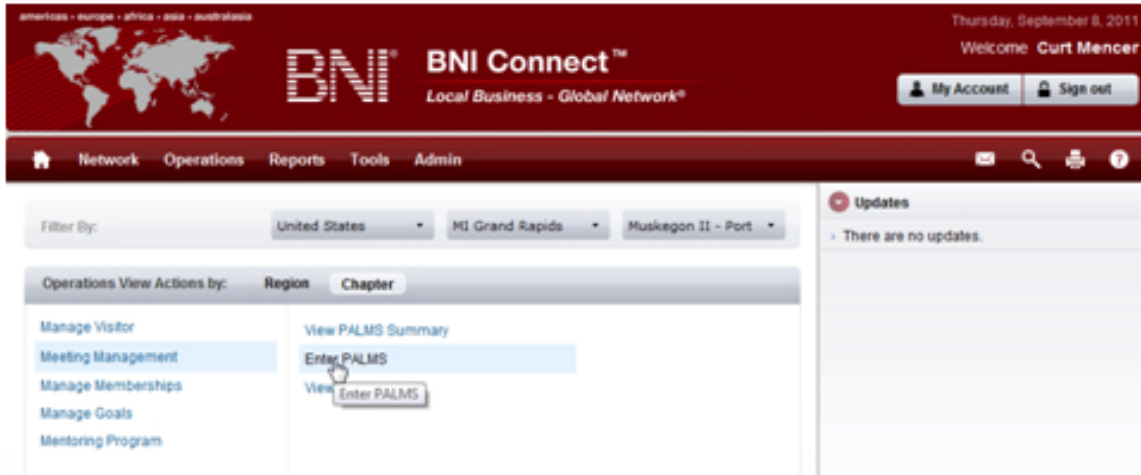
Submit PALMS Mark as Holiday Save as Draft Discard PALMS

f. Your PALMS will display

Show 10 entries Search:

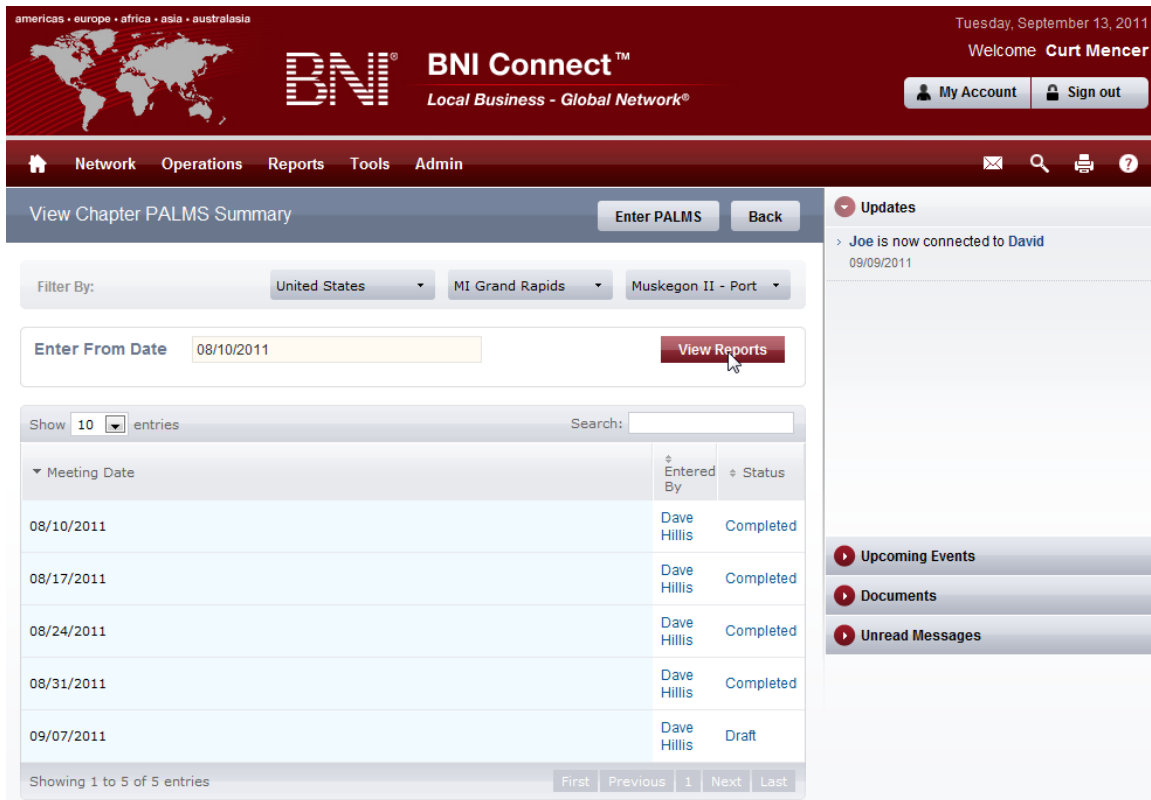
Member	PALMS	RGI	RGO	RRI	RRO	Visitor	121	TYFCB	CEU
Annette Vida	P	2	1	1	1	0	0	160.00	0
Bobby Anderson	A	0	0	0	0	0	0	0.00	0
Brenden Gibbs	A	0	0	0	0	0	0	0.00	0
Brian Ahern	P	0	0	0	2	0	0	75.00	0
Cameron Carr	P	2	1	1	1	0	0	70.00	0
Cathy Morin	P	0	1	2	2	0	0	0.00	0
Curt Mencer	P	1	1	1	0	0	0	0.00	0
Dave Hillis	P	0	2	3	2	0	0	45.00	0
Don Vanderkooi	S	1	0	0	1	0	0	25.00	0
Eloy Martinez	P	2	0	1	0	0	0	410.00	0
Erin Vanderwier	L	2	0	0	0	0	0	0.00	0
Fredric Reinecke	L	0	1	1	0	0	0	0.00	0
Gary Spencer	P	1	0	3	0	0	0	0.00	0

9. If you make a mistake and want to edit a PALMS report you have already processed, Under **"Operations"; "Chapter"** click on **"Meeting Management"** and then click on **"Enter Palms"**



10. Click on **"View PALMS Summary"**.

- Click once in the box to the right of **"Enter Meeting Date"**. A calendar will drop down with the available dates (your chapter meeting day) highlighted.
- Pick the earliest date for which you want to view reports.
- Click on **"View Reports"** -- a list of available reports will display.



11. Click on "**Completed**" in the Status column to reopen the report.

The screenshot shows the BNI Connect web application interface. At the top, there is a navigation bar with a home icon and links for Network, Operations, Reports, Tools, and Admin. Below this is a header for "View Chapter PALMS Summary" with buttons for "Enter PALMS" and "Back".

Filtering options are shown: "Filter By:" with dropdowns for "United States", "MI Grand Rapids", and "Muskegon II - Port". Below this is a section for "Enter From Date" with a text input field containing "08/10/2011" and a "View Reports" button.

A table displays meeting entries. The table has columns for "Meeting Date", "Entered By", and "Status". The "Status" column header is circled in blue. The table contains five rows of data, with the last row (09/07/2011) highlighted in yellow. A mouse cursor is pointing at the "Completed" status of this row.

Meeting Date	Entered By	Status
08/10/2011	Dave Hillis	Completed
08/17/2011	Dave Hillis	Completed
08/24/2011	Dave Hillis	Completed
08/31/2011	Dave Hillis	Completed
09/07/2011	Curt Mencer	Completed

At the bottom of the table, it says "Showing 1 to 5 of 5 entries" and includes pagination controls: "First", "Previous", "1", "Next", "Last".

12. Your PALMS Report will display

Member	PALMS	RGI	RGO	RRI	RRO	Visitor	121	TYFCB	CEU
Annette Vida	P	2	1	1	1	0	0	160.00	0
Bobby Anderson	A	0	0	0	0	0	0	0.00	0
Brenden Gibbs	A	0	0	0	0	0	0	0.00	0
Brian Ahern	P	0	0	0	2	0	0	75.00	0

13. At the bottom of the report, click on "**Unlock Palms**".

Employee Name	P	S	A	V	U	W	OT	Rate	Amount
Marie Essenberg	P	1	3	0	1	0	0	0.00	0
Mark Chandonnet	P	1	0	2	0	0	0	0.00	0
Michelle Garzelloni	P	1	1	0	0	0	0	143.00	0
Randy Yeager	P	0	1	0	1	0	0	0.00	0
Rick Fisher	P	3	0	1	0	0	0	0.00	0
Tim Essenberg	P	3	1	1	2	0	0	0.00	0
Ward Van Dam	P	2	0	0	0	0	0	312.00	0
BNI	P	0	0	0	0	0	0	0.00	0
Visitor	P	0	0	0	0	0	0	0.00	0
Total		35	18	34	23	0	0	1779.00	0

Showing 1 to 34 of 34 entries

[Unlock Palms](#)

14. Edit the report as needed and click on "**Submit PALMS**". The report will be updated.

Kathi Upman	P	3	0	4	1	0	0	0.00	0
Lisa Panozzo	S	1	0	0	0	0	0	0.00	0
Lynn Kroll	A	0	0	0	0	0	0	160.00	0
Marie Essenberg	P	1	3	0	1	0	0	0.00	0
Mark Chandonnet	P	1	0	2	0	0	0	0.00	0
Michelle Garzelloni	P	1	1	0	0	0	0	143.00	0
Randy Yeager	P	0	1	0	1	0	0	0.00	0
Total		35	18	34	23	0	0	1779.00	0

Showing 1 to 34 of 34 entries

[Submit PALMS](#)
[Mark as Holiday](#)
[Save as Draft](#)
[Discard PALMS](#)