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BNI Connect[®] Training

Editing the PALMS Report

Version 1.0 – 10/30/2011

Table of Contents

Overview.....	3
Editing the PALMS Report	4
Overview of the PALMS Entry Screen.....	7
PALMS Cheat Sheet	9
Conclusion	11

PALMS Entry Process


Overview

This manual will outline the steps required to editing a completed Chapter's PALMS report.

The PALMS Report is a key tool for the Chapter to track its effectiveness and how well the Members are performing. Accurate data entry is critical for this reason.

The PALMS Entry Process

Start the PALMS entry by logging into BNI Connect® at <http://bniconnect.com>.



The screenshot shows the BNI Connect login interface. At the top left, there is a navigation menu with the text "americas • europe • africa • asia • australasia" and a world map icon. To the right of the map is the BNI logo and the text "BNI Connect™ Local Business - Global Network®". Below this is the heading "Sign-in to BNI Connect". The login form consists of two input fields: "Username :" and "Password :", each followed by a white text input box. Below the password field is a "Login" button. Underneath the button is a link that says "Lost password? Click here." At the bottom left of the page, there is a copyright notice: "Copyright 2011 BNI. All Rights Reserved. Terms of Use | Privacy Policy".

Log into BNI Connect® using the username and password created when initially joining the website.

Once logged into the website, the “Dashboard” will appear. This screen will be the start or jumping off point for most of the functions in BNI Connect®.

After logging into BNI Connect[®], choose the 'Chapter' option under the 'Operations' menu as shown in figure 2.

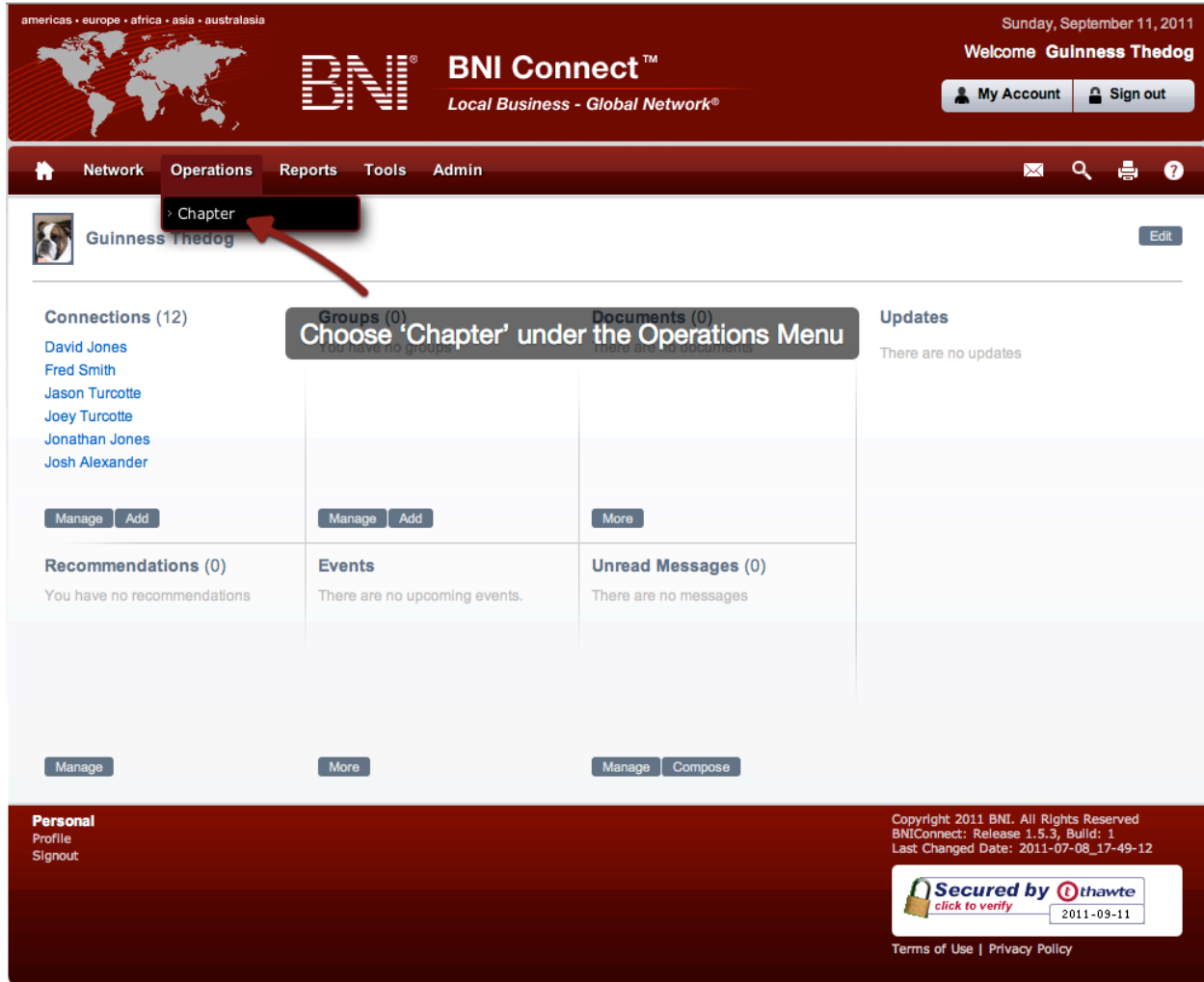


Figure 2

The next screen shows all the operations that can be performed at the chapter level. As indicated in Figure 3, select 'Meeting Management' in the list on the left and then select 'View PALMS Summary' from the list on the right.



Figure 3

The next step will be to enter the meeting date for the PALMS report that is to be edited. After the correct date has been selected, click 'View Reports'. All of the reports that have been entered to date will appear. Under 'Status' click on the completed report that is to be edited.

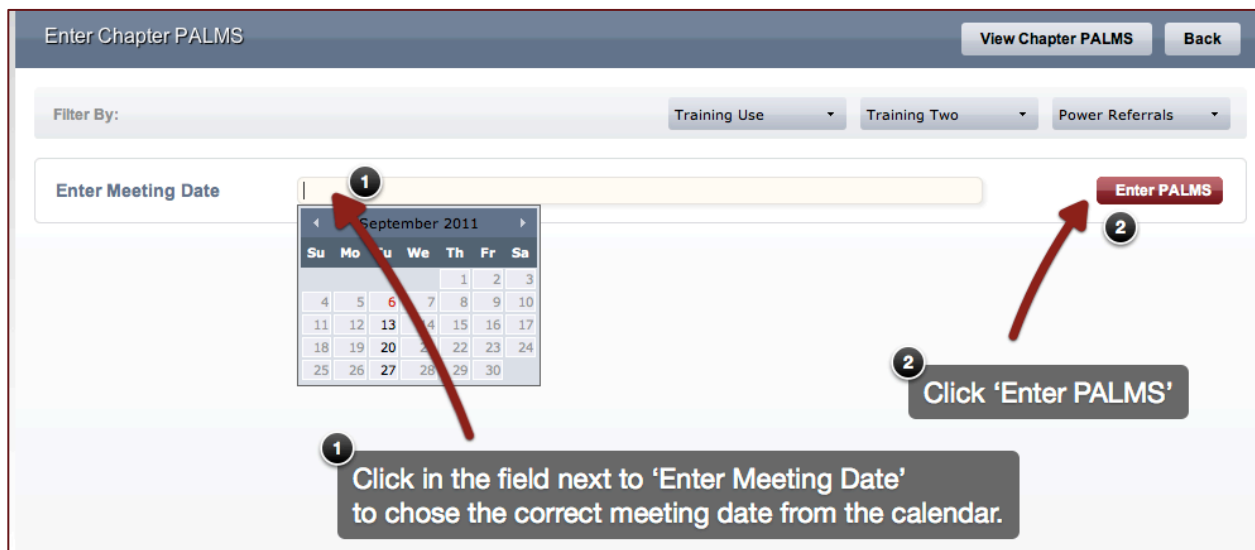


Figure 4

Overview of the PALMS Entry Screen

When the report appears, click 'Unlock PALMS' at the bottom of the page. Update the data as needed. After the information has been updated, select 'Save as Draft' to review the updated information to be sure it is correct. Click 'Submit PALMS' to complete the new PALMS report.

Member	PALMS	RGI	RGO	RRI	RRO	Visitors	121	TYFCB (whole amounts only)	CEU
David Jones	P	0	0	0	0	0	0	0	0
Fred Smith	P	0	0	0	0	0	0	0	0
Guinness Thedog	P	0	0	0	0	0	0	0	0
Jason Turcotte	P	0	0	0	0	0	0	0	0
Joey Turcotte	P	0	0	0	0	0	0	0	0
Jonathan Jones	P	0	0	0	0	0	0	0	0
Josh Alexander	P	0	0	0	0	0	0	0	0
Julie Hardwick	P	0	0	0	0	0	0	0	0
Keith Allgone	P	0	0	0	0	0	0	0	0
Mindi Deirf	P	0	0	0	0	0	0	0	0

Figure 4

On this screen is a grid showing all of the chapter Members with columns to record various statistics. Note that the members can be re-arranged alphabetically by either first or last name by clicking the column titles of 'First Name' or 'Last Name'.

- PALMS Column – Choose whether a particular Member was (P)resent, (A)bsent, (L)ate, on (M)edical leave or had a (S)ubstitute standing in for them for this particular meeting.
- RGI – Referrals Given Inside or Tier 1 referrals
- RGO – Referrals Given Outside or Tier 2 referrals
- RRI – Referrals Received Inside or Tier 1 referrals

- RRO – Referrals Received Outside or Tier 2 referrals
- Visitors – Record the number of visitors a particular Member brought to the meeting this week
- 121 – Record the number of 121s a Member reported for the week being entered.
- TYFCB – Enter the total Thank You For Closed Business that a Member was credited for the week
- CEU – Enter the appropriate Chapter Education Units that a Member reported for the week

Until the acronyms are familiar on this page, keep the following “cheat sheet” on hand for reference.

PALMS Cheat Sheet

Column	Definition
PALMS	Tracks whether a Member was Present, Absent, Late, on Medical leave or was represented by a Substitute
RGI	Referrals Given Inside (Tier 1)
RGO	Referrals Given Outside (Tier 2)
RRI	Referrals Received Inside (Tier 1)
RRO	Referrals Received Outside (Tier 2)
Visitors	Tracks how many Visitors a Member brought for a particular week
121	Tracks how many 121 meetings a Member reported for a particular week
TYFCB	Records Thank You For Closed Business for a particular Member
CEU	Tracks Chapter Education Units reported by a Member

At the very bottom of the PALMS entry form is a section for Remarks. Use this section for comments about the meeting.

After entering all the required data, the screen should look similar to Figure 5.

Enter Chapter PALMS | Status: Draft 09/06/2011 View Chapter PALMS Back

Search:

Member	PALMS	RGI	RGO	RRI	RRO	Visitors	121	TYFCB (whole amounts only)	CEU
David Jones	P	2	1	0	2	1	3	1245.00	15
Fred Smith	P	0	1	2	0	2	3	95.00	10
Guinness Thedog	P	3	1	1	0	4	5	3200.00	18
Jason Turcotte	P	3	2	3	1	2	2	125.00	9
Joey Turcotte	S	0	0	0	0	0	0	534.00	0
Jonathan Jones	P	1	1	2	2	0	1	0.00	5
Josh Alexander	P	0	0	0	0	0	2	25.00	5
Julie Hardwick	P	0	2	1	2	1	8	0.00	8
Keith Allgone	P	0	0	0	0	0	0	88.00	5
Mindi Deirf	P	0	4	2	3	3	3	125.00	12
Peter Washington	P	2	0	0	2	0	7	95.00	15
Sarah Savealot	P	1	1	1	1	1	1	95.00	5
Total		13	17	13	17	15	39	6057.00	121

Showing 1 to 15 of 15 entries

When finished, click the 'Submit PALMS' button.
You may want to click 'Save as Draft' if you want to work on the PALMS report at a later time.

Submit PALMS Mark as Holiday Save as Draft Discard PALMS

Figure 5

The buttons along the bottom of the report allow the PALMS Report to be submitted when it is complete or mark this particular meeting date as a holiday when the Chapter did not have a meeting. The 'Save as Draft' button saves the work in progress should the PALMS Report need to be saved to work on later. Lastly, the 'Discard PALMS' button will delete the PALMS Report currently being worked on. **Use this button with caution.**

Helpful Hint

Click the 'Save as Draft' button periodically during the data entry process. This will ensure the work is periodically saved in case the connection to the Internet is lost or other problem occurs.

When all the weekly data is entered, verify that the information is correct and click the 'Submit PALMS' button to complete the process. Take a few moments to ensure the accuracy of the report before submitting the final report as the ability to edit the report afterwards varies from region to region.

Conclusion

That's it... the chapter's PALMS report has been entered! This will help the chapter effectively track the performance of the Members and the Leadership Team can now use this report as a tool to gauge Member participation and help those struggling as well as recognize the chapter leaders for a job well done!