



VICE PRESIDENT / MEMBERSHIP CO-ORDINATOR BNI CONNECT QUICK START GUIDE

PALMS REPORT

Operations>Chapter>Meeting Management>
Enter PALMS>Enter Meeting Date>Enter PALMS>
Enter Information>Submit PALMS

FYI: If after 7-8 minutes you are still working on your PALMS you will need to save your entries to Save as Draft or you can lose everything you have entered. Once you have saved to a Draft you can then finish your entries. If you are on the Report for any length of time you will need to continue to do this periodically until you have finished your entries.

Or

1. Operations
2. Chapter
3. Meeting Management
4. Enter PALMS
5. Enter Meeting Date
6. Enter PALMS
7. Enter Information
8. Submit PALMS

UNLOCK PALMS REPORT

Operations>Chapter>Meeting
Management>View PALMS Summary>
Enter Date>

Or

1. Operations
2. Chapter
3. Meeting Management
4. View PALMS Summary
5. Enter Date (a box will come up with a Calendar & This screen will display dates that have been worked on)
7. Choose Date – click on completion date
8. Bottom of screen - Unlock Palms
9. Make adjustments and then submit

SUMMARY PALMS REPORT

Reports>Chapter>Summary PALMS
Report>Enter Dates>Go

FYI: This will provide a one sheet summary of the PALMS REPORT for the months you have entered and it can be Exported to an Excel Sheet or Printed.

Or

1. Reports
2. Chapter
3. Summary PALMS Report
4. Enter Dates
5. Go



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ENTER CHAPTER GOALS

Operations>Chapter>Enter Manage Goals>Add Information>Go> Add Goals for all 8 areas (under each goal is a Mechanism – this is where you write a brief outline on a particular area you will start with to accomplish your goal. In the upper right corner is Chapter Goal Guide, this will give you ideas for Mechanisms)>Save

Or

1. Operations
2. Chapter
3. Manage Goals
4. Enter Chapter Goals
4. Add Information
5. Go
6. Add the 8 areas of Goals
7. Add Mechanism
8. Go

REVIEW CHAPTER GOALS

Operations>Chapter>Manage Goals>View Chapter Goals>Start Date>View (You can Export or Print this form)

Or

1. Operations
2. Chapter
3. Manage Goals
4. View Chapter Goals
5. Start Date
6. View

CREATE EMAIL

Operations>Chapter>Create Email>Email My Chapter>Copy & Paste Names to Email Page>Add Information>Send

Or

1. Operations
2. Chapter
3. Create Email
4. Email My Chapter
5. Copy & Paste Names to Email Page
6. Add Information
7. Send