# How to Track Multiple Services in One Form

Welcome, we will start shortly!

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# Meet Your Trainer

Annie Novacek

Sr. Training Specialist

ClientTrainingRequests@BonterraTech.com

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# Learning Objective

The goal of this training is to equip you with an alternative to using checkboxes to easily track multiple services in one form while still maintaining effective reporting.

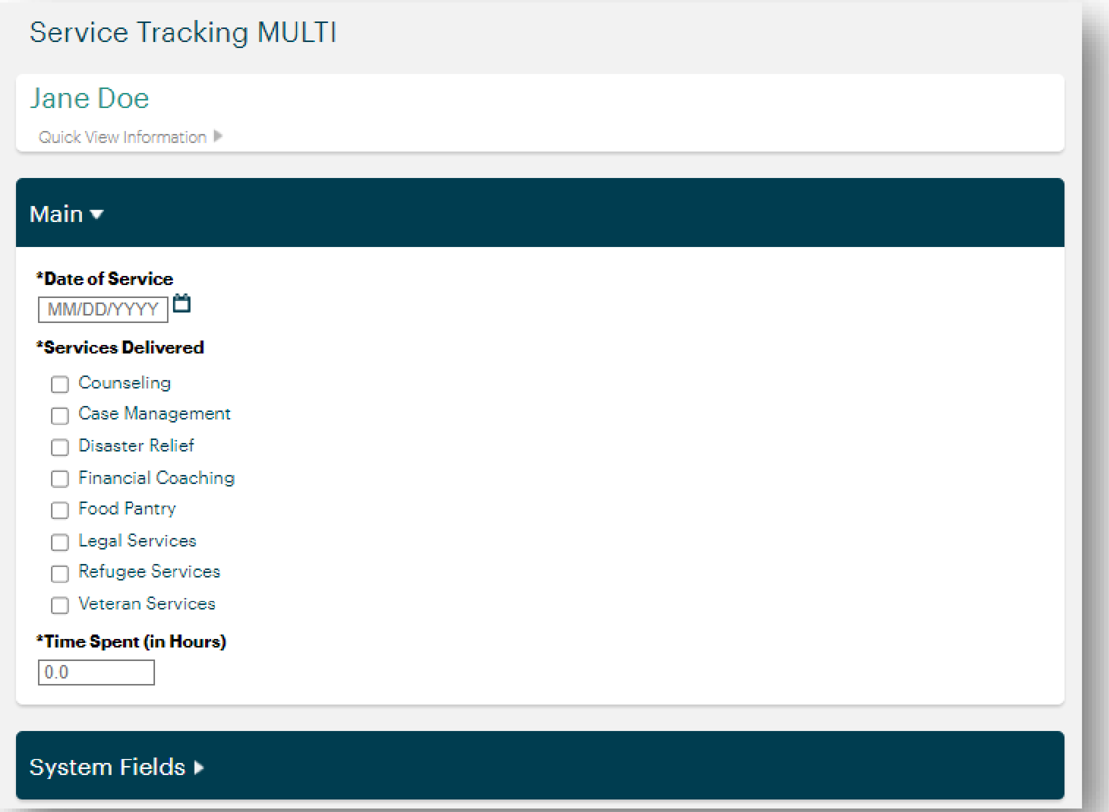
# Agenda

- Problem
- Solution
- How to Configure
- Reporting Tips

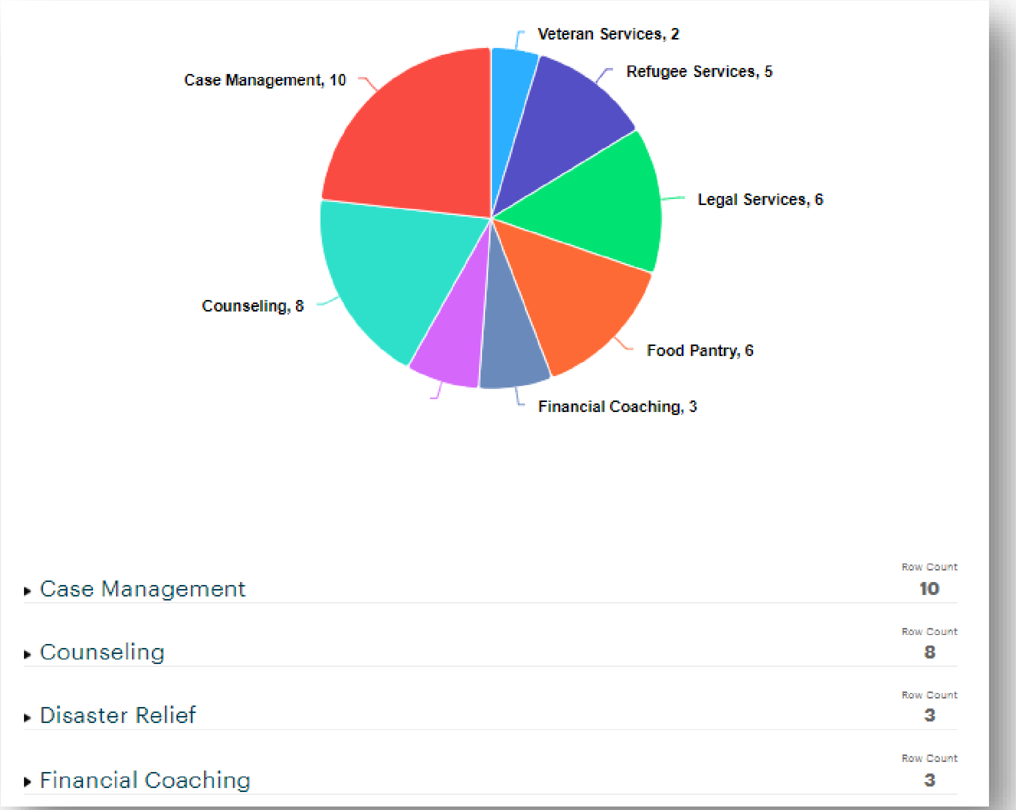
# Problem

# Problem: Multi-Service Tracking

## You want a form that looks like this…




## …But reporting that looks like this…

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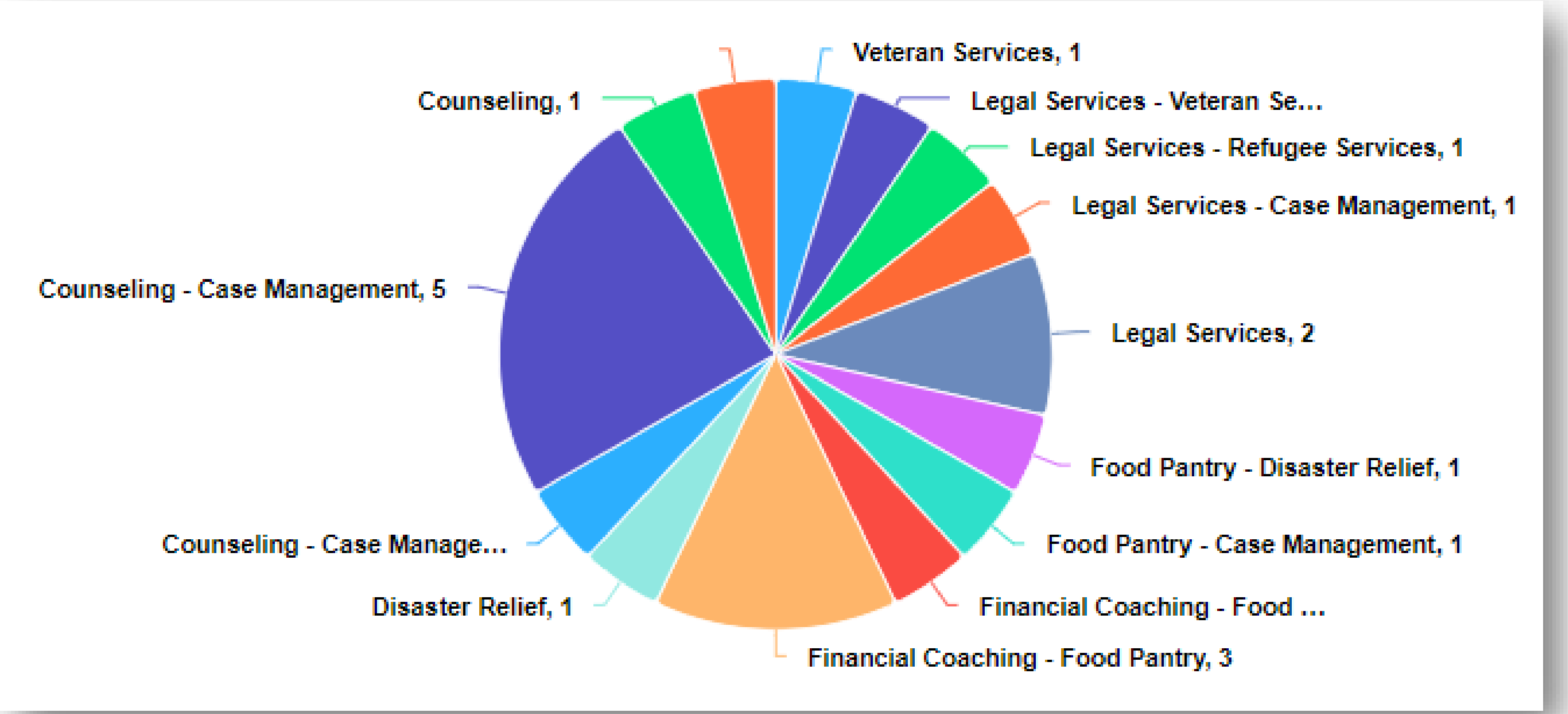
# Problem: Multi-Service Tracking

**… And yet, reporting on checkboxes looks like this…**



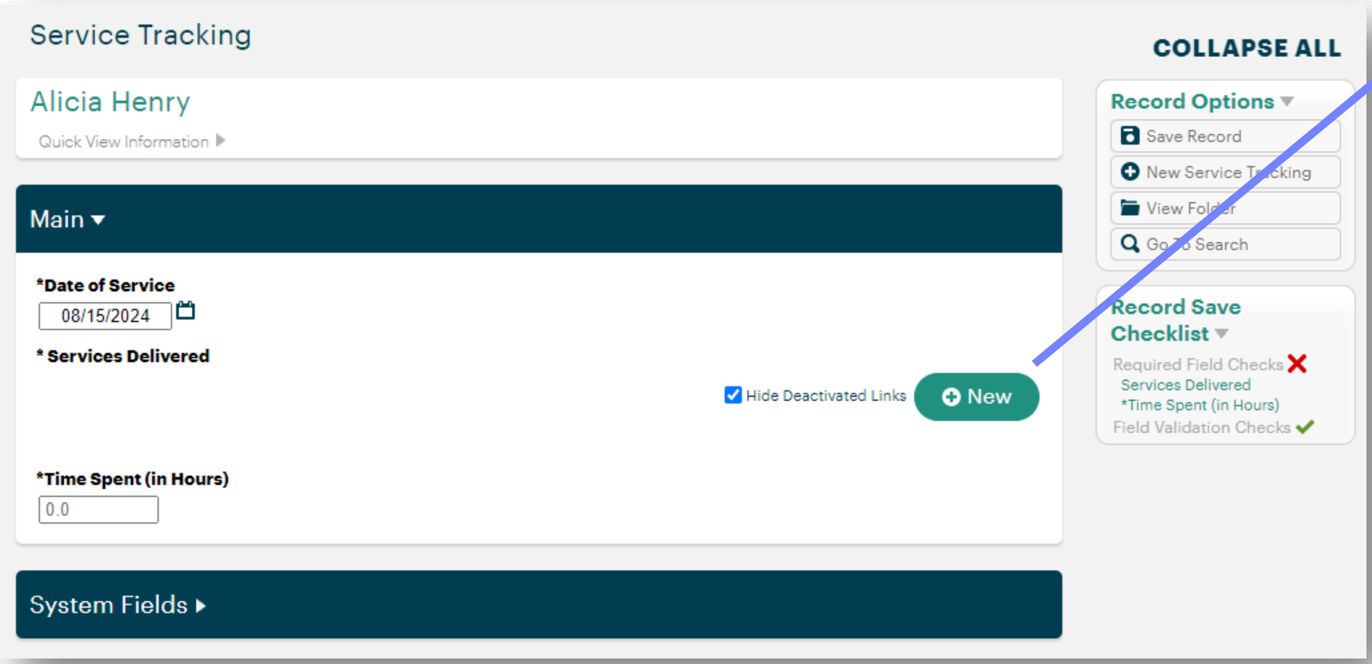
# Potential Use Cases

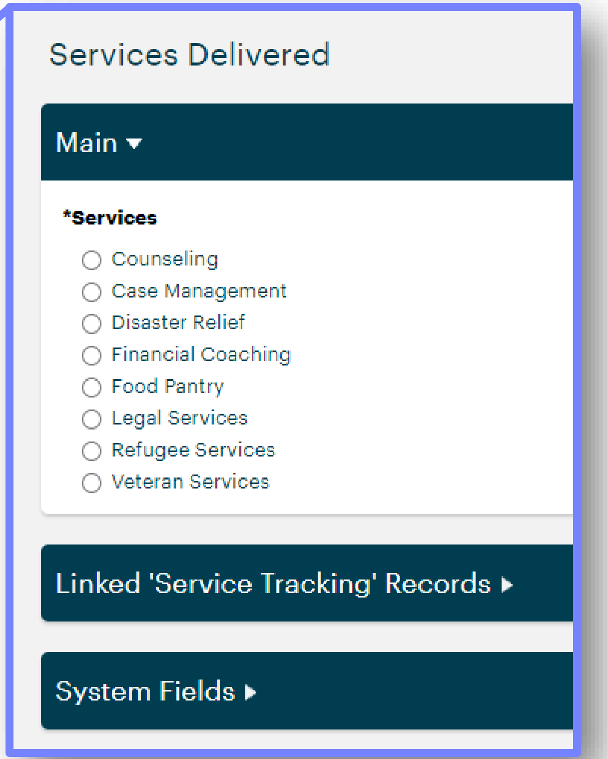
| | | | |
|---|---|---|---|
| Services Provided | Support Needed | Topics Discussed | Medical Conditions |
| Disabilities | Addictions | Volunteer Availability | Non-Distinct Demographics |

# Solution

# Solution: Main Form Linked to Hidden Sub Form

- User experience looks like one form with the ability to choose multiple options.
- Data produced is separated by option for clean, effective reporting.



# How to Configure

# How to Configure

**Step 1**: Create Sub Form.

**Step 2**: Create Main Form.

**Step 3**: Link the Two Forms.

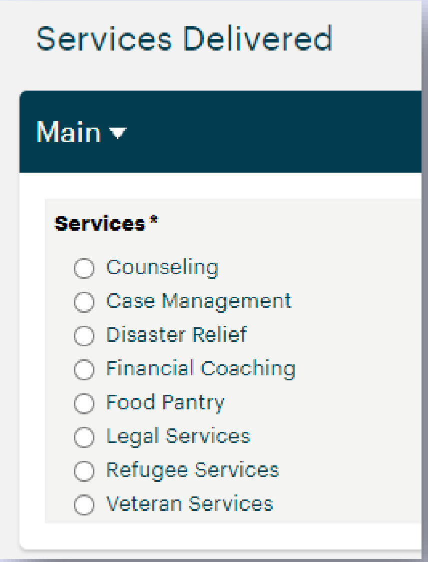
**Step 4**: Publish Both Forms.

**Step 5**: Start Collecting Data.

# How to Configure

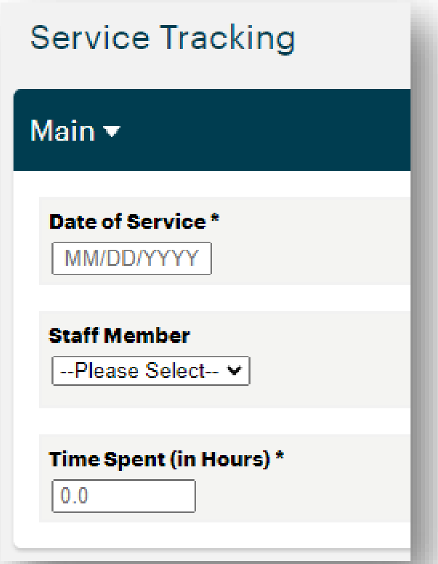
**Step 1**: Create Sub Form.

- Keep it simple: Single select Option field with the list of answer choices.
- Select Form Property to "Hide from Navigation Menu".




**Step 2**: Create Main Form.

- Include any fields needed for the interaction except Services Option Field.
- For example: Date of Service, Location, Staff Member, Time Spent, etc.



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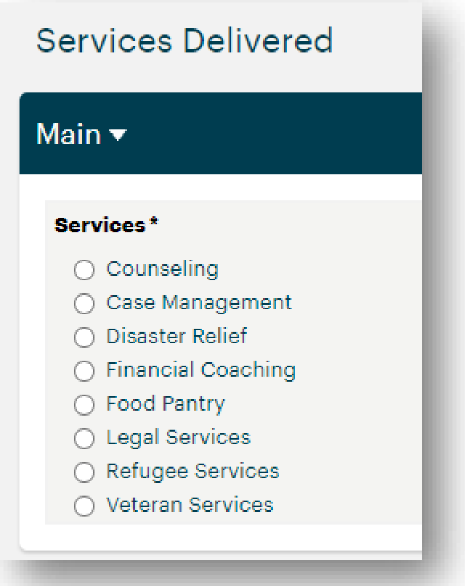


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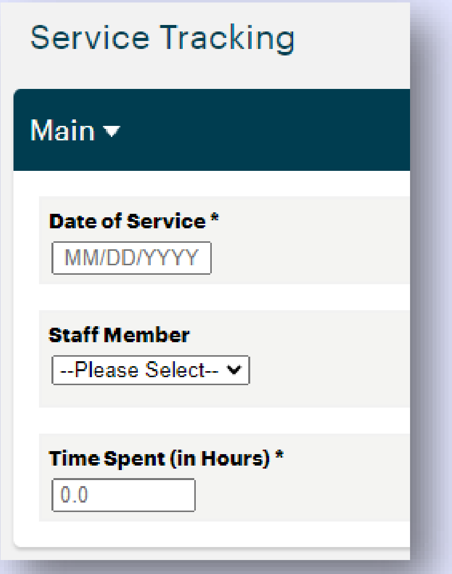


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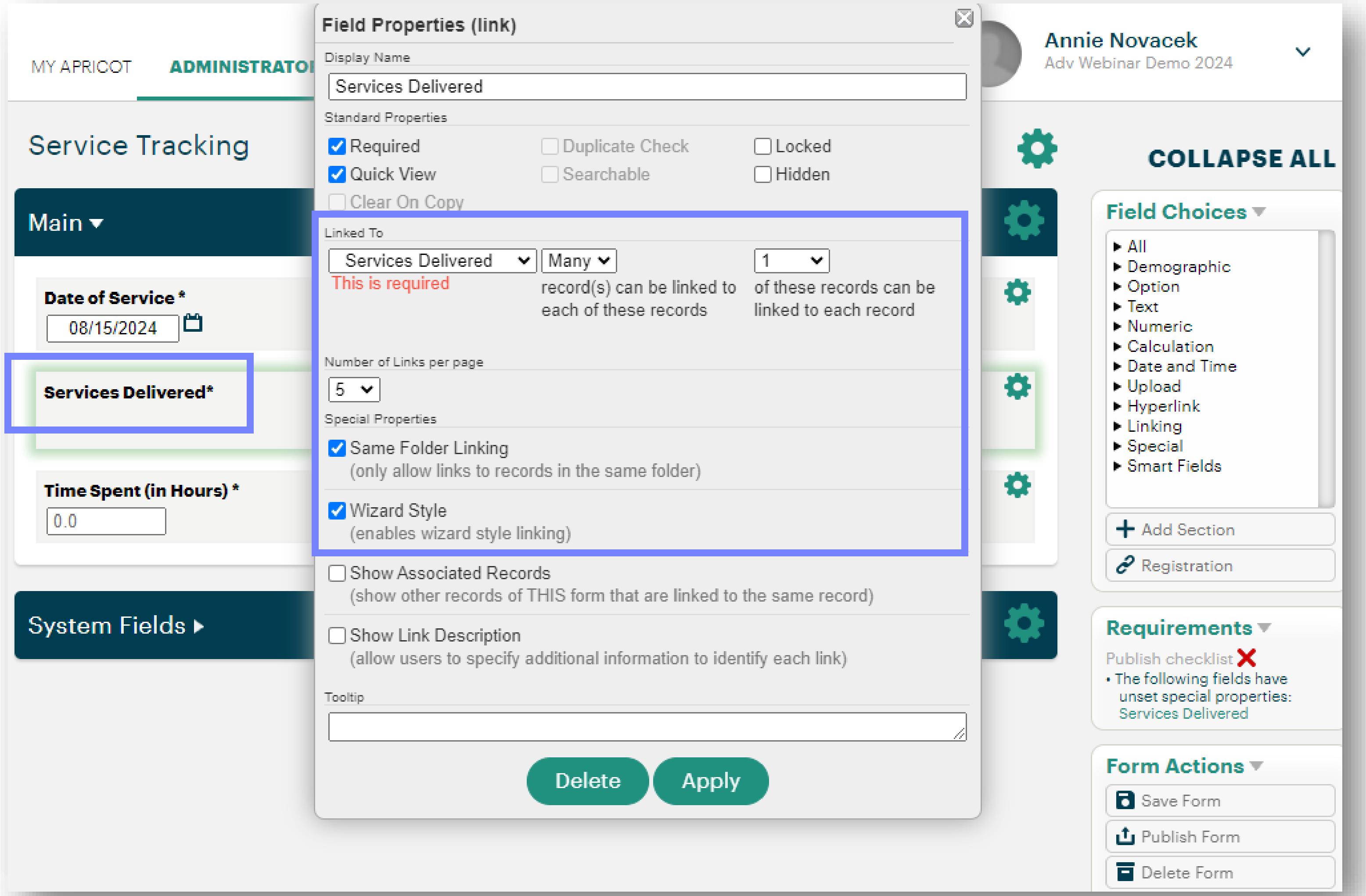
# How to Configure

**Step 3**: Link the Two Forms.

- Base form is Main.
- Target form is Sub.
- Choose Many to 1.
- Check box for Wizard style.

**Step 4**: Publish Both Forms.

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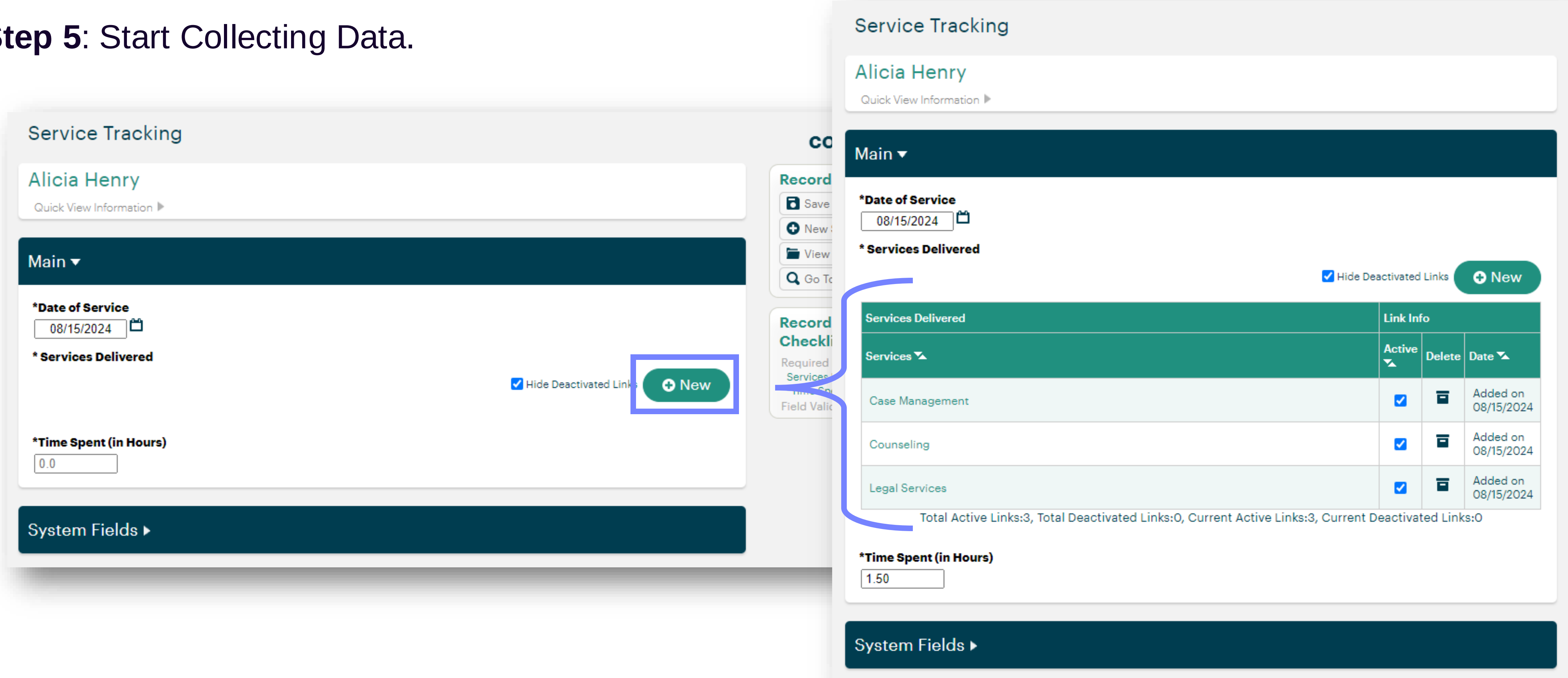
# How to Configure

**Step 5**: Start Collecting Data.



# Managing Linked Records

While this is designed to look like we have created one record, multiple will exist within Apricot. If you need to archive any of these Tier 2 records for whatever reason, take care of the sub records first and then the main form records.

# Reporting Tips

# Reporting on Multi-Service

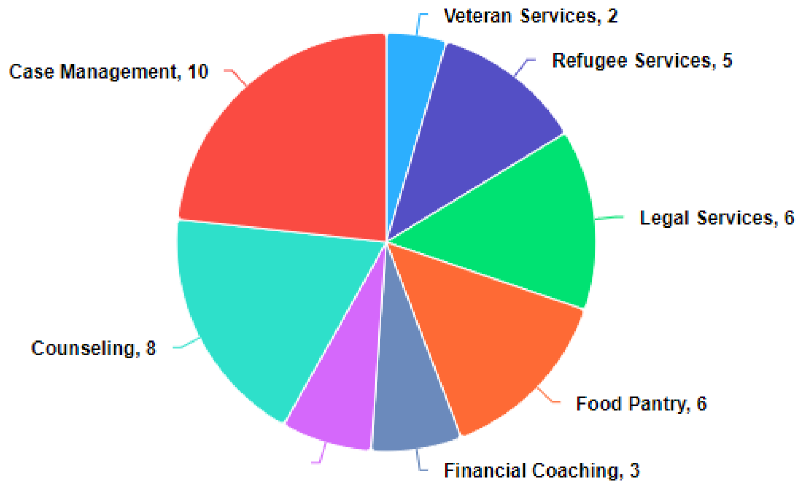
**Step 1**: Pull in data from Tier 1.

**Step 2**: Pull in data from Main Tier 2.

**Step 3**: Pull in data from Sub Tier 2.

**Step 4**: Update Linking Relationship.

**Step 5**: Publish and Run!




| | |
|---|---|
| ▸ Case Management | Row Count 10 |
| ▸ Counseling | Row Count 8 |
| ▸ Disaster Relief | Row Count 3 |
| ▸ Financial Coaching | Row Count 3 |
| ▸ Food Pantry | Row Count 6 |

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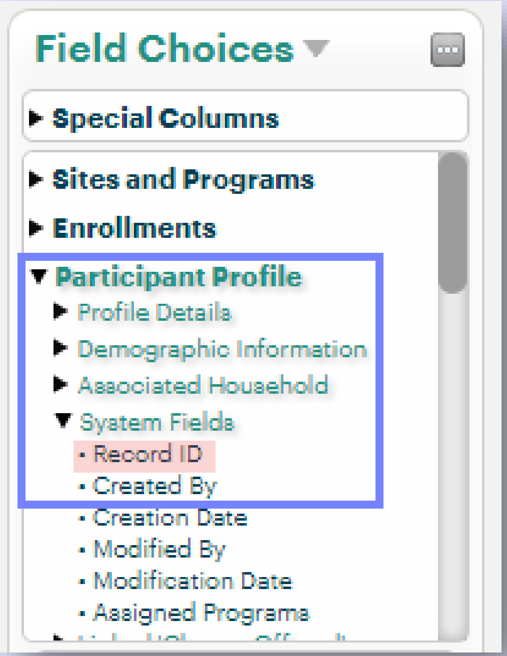
# Reporting on Multi-Service

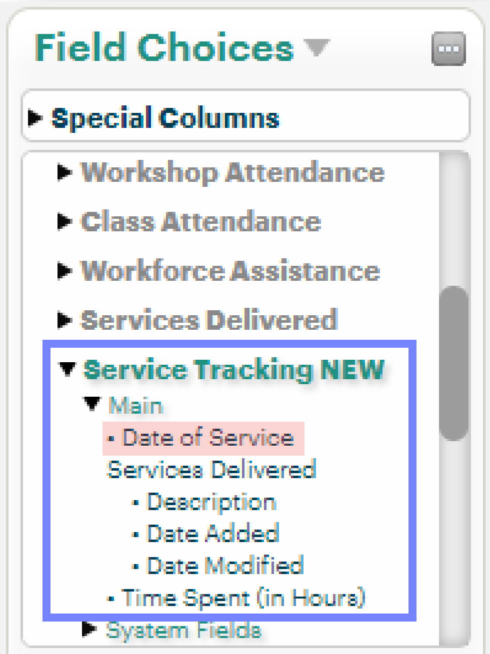
**Step 1**: Pull in data from Tier 1.

- Always start with Tier 1, at least one data point like Record ID.



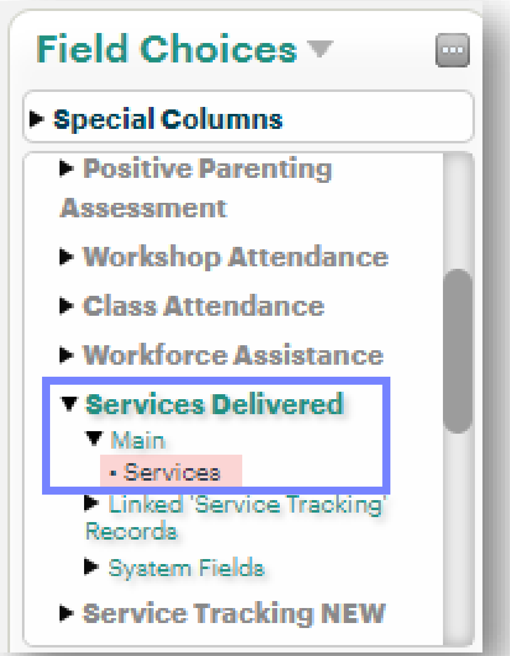

**Step 2**: Pull in data from Main Tier 2.

- Recommend pulling Date of Service and anything else about the overall interaction.




**Step 3**: Pull in data from Sub Tier 2.

- Grab the option field with Service.
- No other data needed here.

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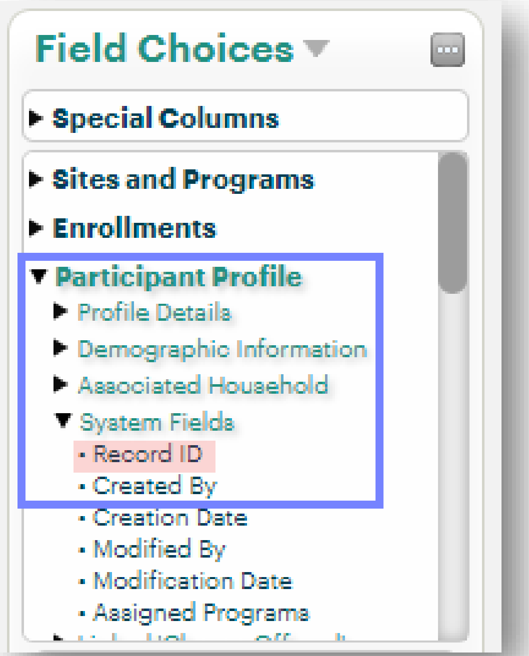


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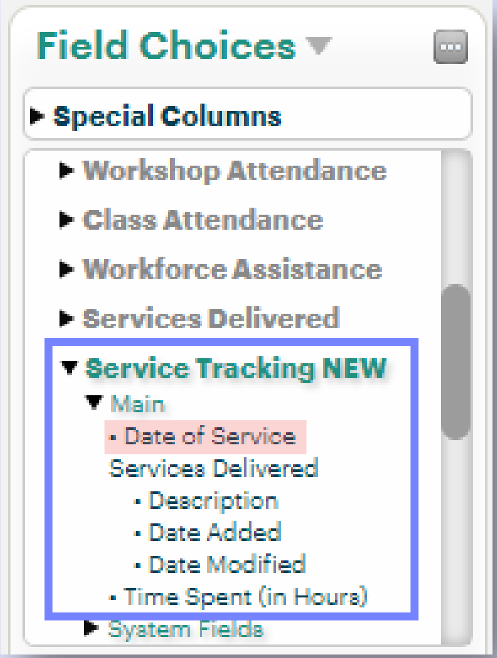


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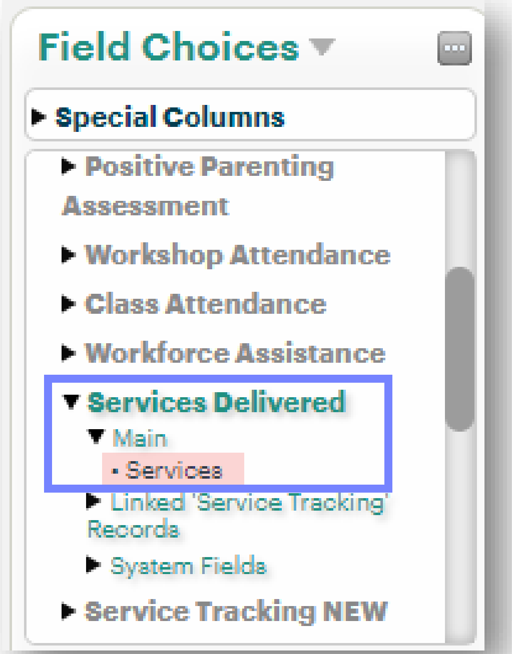


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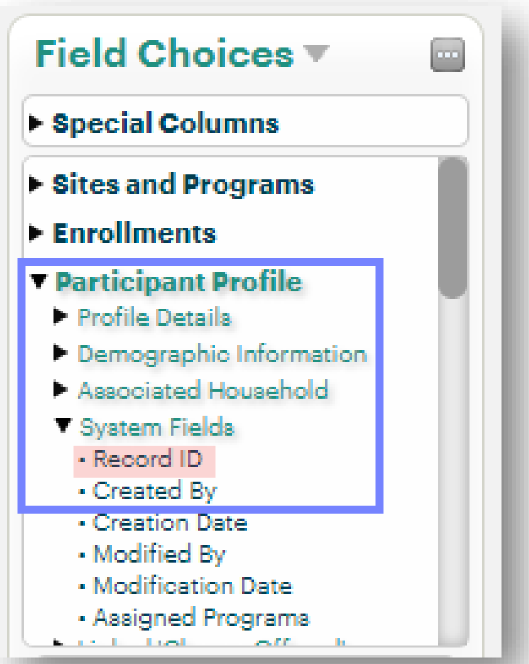


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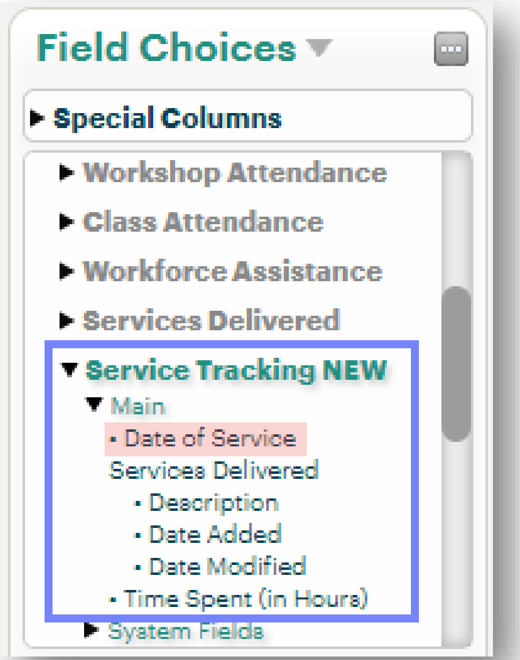


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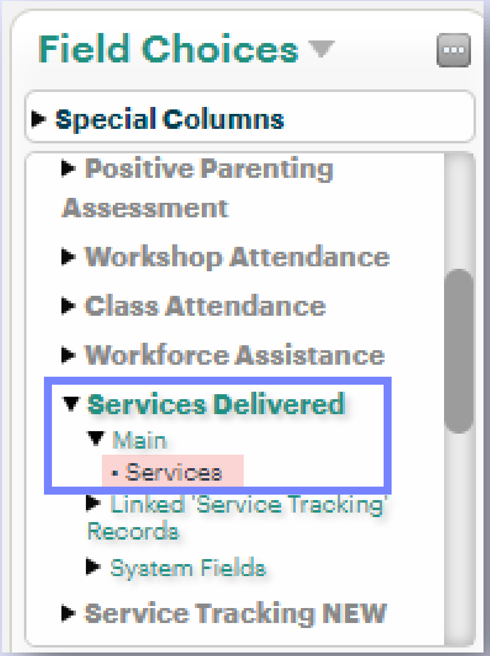


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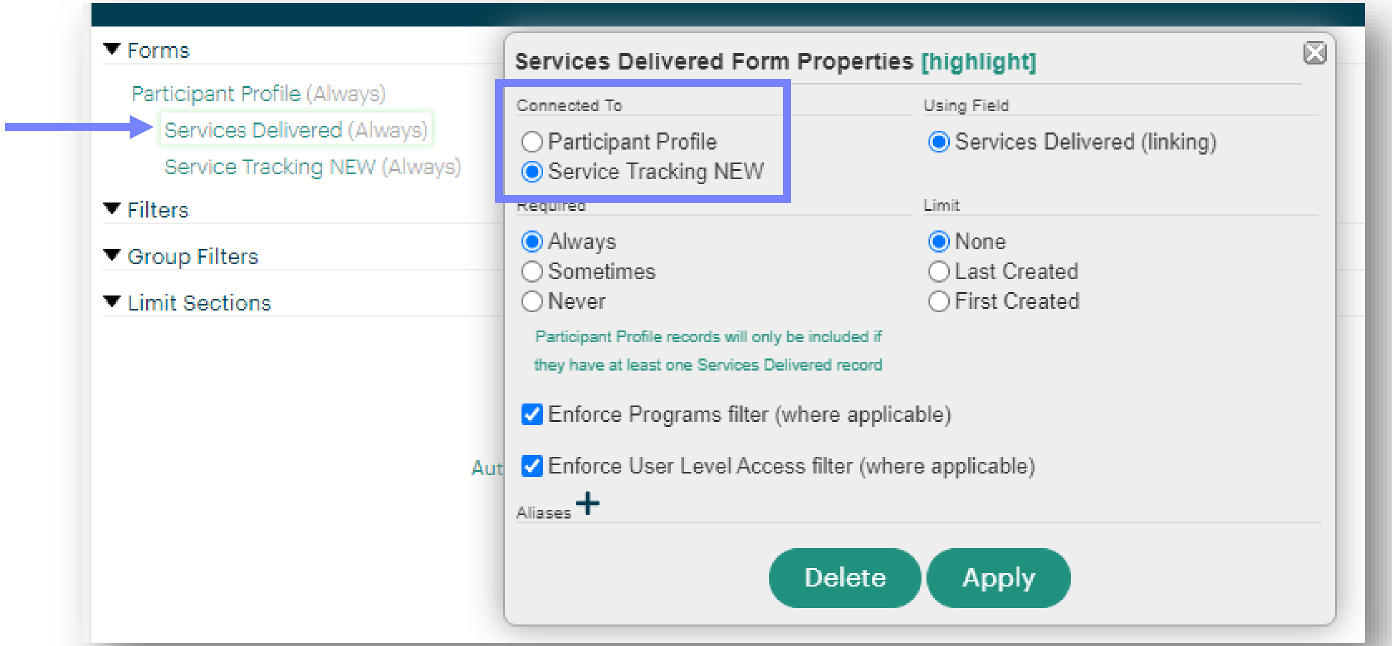
# Reporting on Multi-Service

**Step 4**: Update Linking Relationship.

- Click on the Sub Form in the Forms list.
- Change to the Tier 2 under “Connected To.”

**Step 5**: Publish and Run!

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# Additional Resources

# Additional Training Opportunities

- Knowledge Base – How-To Articles (Search Chat or Visit Online)
- Bonterra Academy – Free Webinars & Recordings
- Foundations – Intensive, Multiday Courses to Cover Admin Basics
- Admin Labs – 2 Hour Live Trainings on Specific Capabilities
- Private Training – 1:1 Sessions with Training Expert in Your Apricot (End User & Admin Topics Available)

Build confidence & knowledge in our software!

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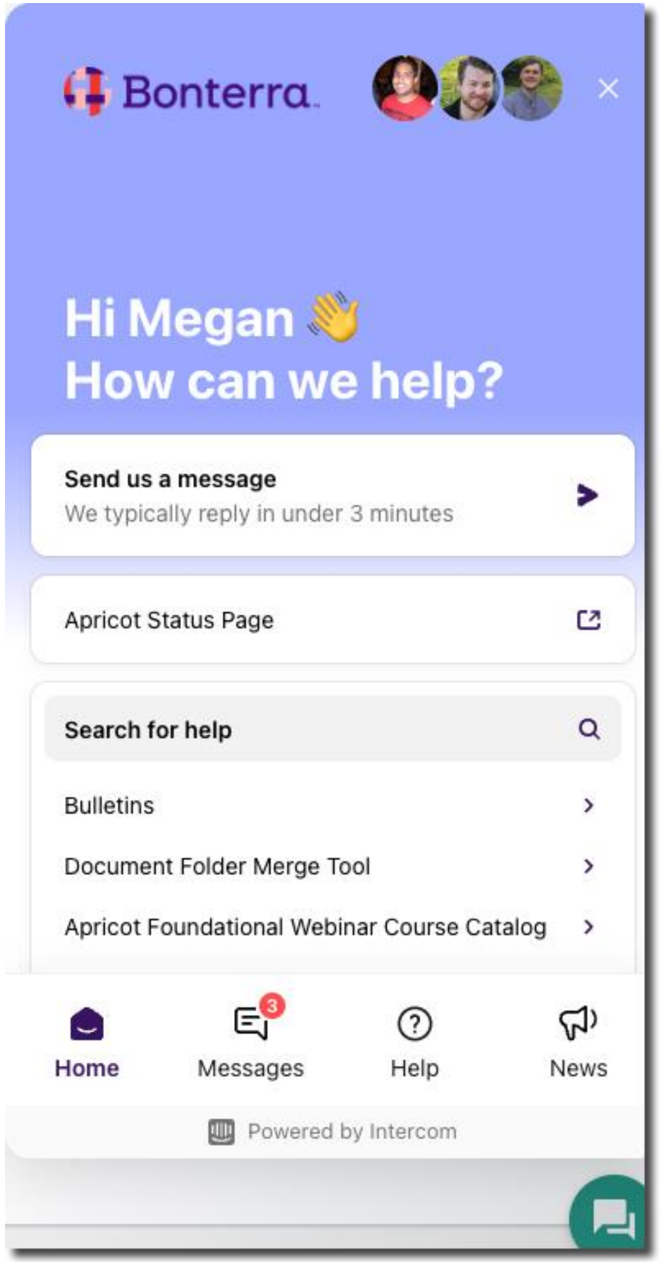
# Customer Support

**Reach out to our Customer Support Team with Questions or Concerns.**

Weekdays 7am – 7pm CST via chat or through email: apricot@bonterratech.com



# Q & A

- Ask questions about functionality covered in this training
- Ask trainer to redo a demo
- Ask real-life application questions
- Or sign off and we will see you in the next training!

# Thank you for attending!

We hope to see you
in future trainings.

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