

# How to Track Multiple Services in One Form

Welcome, we will start shortly!



# Meet Your Trainer

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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...

Service Tracking MULTI

Jane Doe  
Quick View Information ▶

Main ▾

**\*Date of Service**  
MM/DD/YYYY 📅

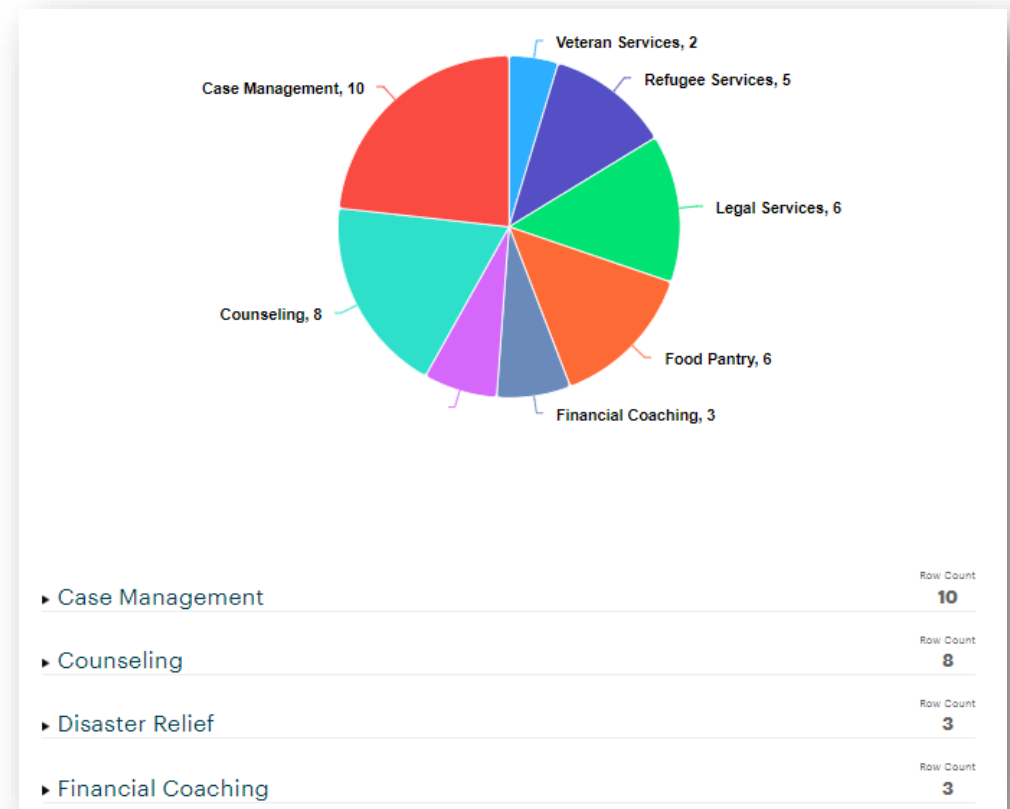
**\*Services Delivered**

- Counseling
- Case Management
- Disaster Relief
- Financial Coaching
- Food Pantry
- Legal Services
- Refugee Services
- Veteran Services

**\*Time Spent (in Hours)**  
0.0

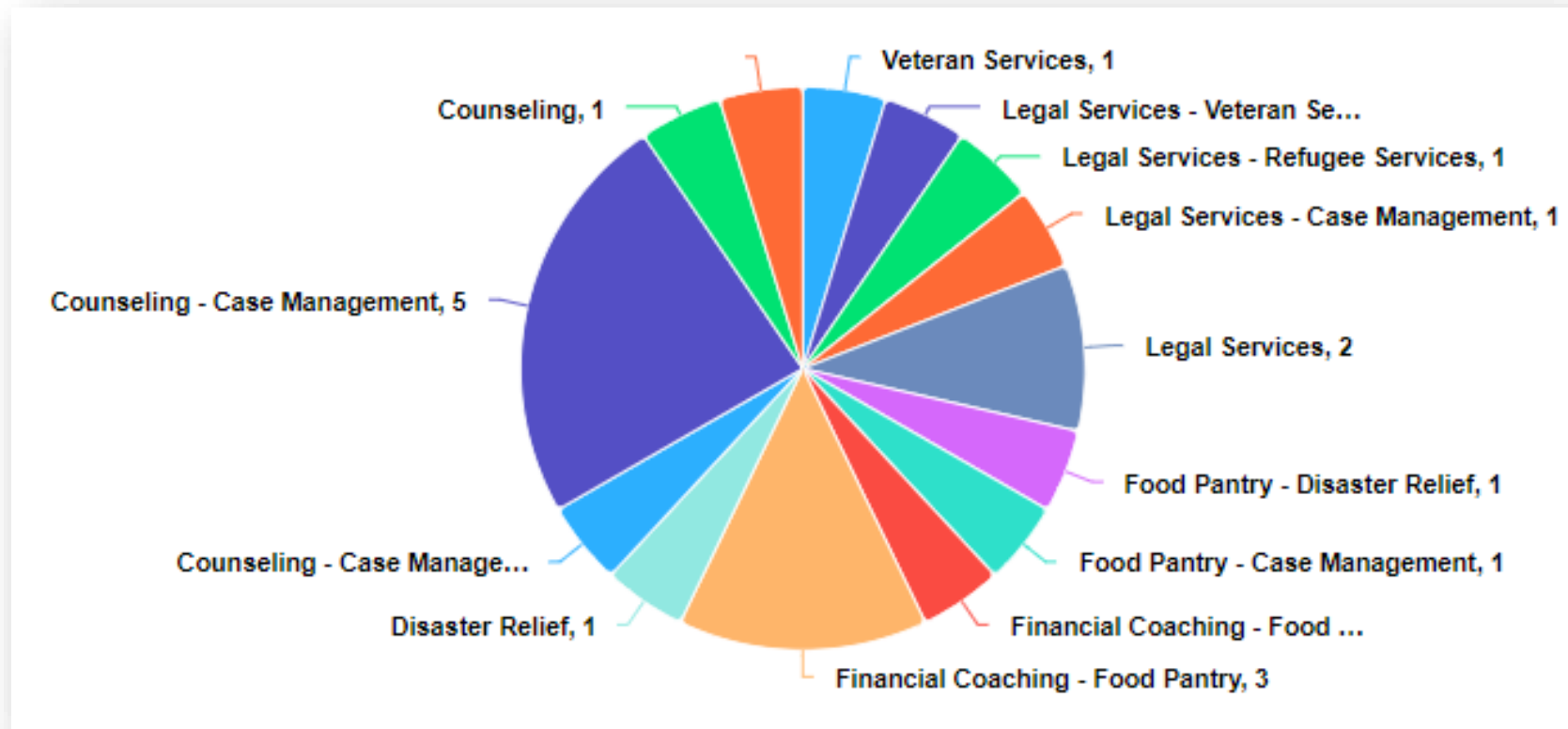
System Fields ▶

...But reporting that looks like this...



# 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.

The screenshot displays a 'Service Tracking' form for 'Alicia Henry'. The form includes a 'Main' section with a 'Date of Service' field (08/15/2024), a 'Services Delivered' field, and a 'Time Spent (in Hours)' field (0.0). A 'New' button is visible next to the 'Services Delivered' field. A callout box highlights the 'Services Delivered' field, showing a list of service options: Counseling, Case Management, Disaster Relief, Financial Coaching, Food Pantry, Legal Services, Refugee Services, and Veteran Services. The callout box also shows a 'Linked Service Tracking Records' section and a 'System Fields' section.

# How to Configure

# How to Configure

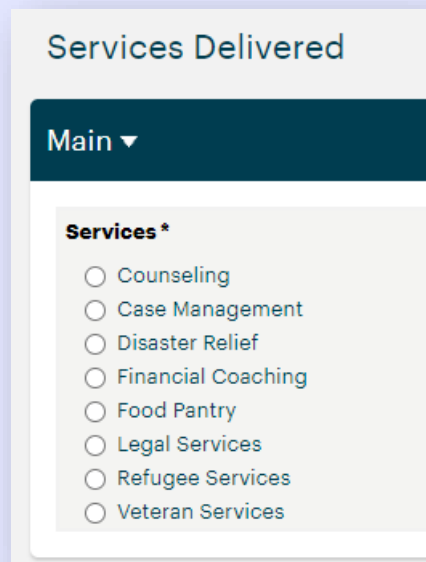
- Step 1:** Create Sub Form.
- Step 2:** Create Main Form.
- Step 3:** Link the Two Forms.
- Step 4:** Publish Both Forms.
- Step 5:** Start Collecting Data.



# How to Configure

## Step 1: Create Sub Form.

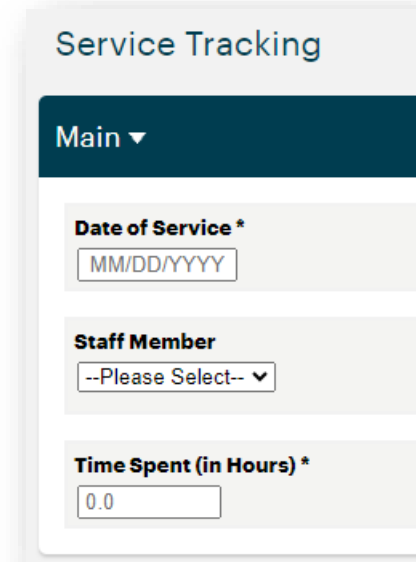
- Keep it simple: Single select Option field with the list of answer choices.
- Select Form Property to “Hide from Navigation Menu”.



The screenshot shows a mobile application form titled "Services Delivered". At the top, there is a dark teal header with the text "Main" and a downward-pointing chevron. Below the header, the form contains a section titled "Services\*" with a list of radio button options: Counseling, Case Management, Disaster Relief, Financial Coaching, Food Pantry, Legal Services, Refugee Services, and Veteran Services.

## 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.



The screenshot shows a mobile application form titled "Service Tracking". At the top, there is a dark teal header with the text "Main" and a downward-pointing chevron. Below the header, the form contains three sections: "Date of Service\*" with a text input field containing "MM/DD/YYYY"; "Staff Member" with a dropdown menu showing "--Please Select--"; and "Time Spent (in Hours) \*" with a text input field containing "0.0".

# 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”.

The screenshot shows a mobile form titled "Services Delivered". At the top, there is a dark teal header with the text "Main" and a downward arrow. Below the header, there is a section titled "Services \*" with a list of radio button options: Counseling, Case Management, Disaster Relief, Financial Coaching, Food Pantry, Legal Services, Refugee Services, and Veteran Services.

## 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.

The screenshot shows a mobile form titled "Service Tracking". At the top, there is a dark teal header with the text "Main" and a downward arrow. Below the header, there are three input fields: "Date of Service \*" with a date picker showing "MM/DD/YYYY", "Staff Member" with a dropdown menu showing "--Please Select--", and "Time Spent (in Hours) \*" with a text input field showing "0.0".

# 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.

The screenshot displays the Bonterra administrative interface. On the left, the 'Service Tracking' form is visible with fields for 'Date of Service' (08/15/2024) and 'Time Spent (in Hours)' (0.0). The 'Services Delivered\*' field is highlighted with a blue box. In the center, a 'Field Properties (link)' dialog box is open, showing the configuration for linking 'Services Delivered' to another 'Services Delivered' field. The 'Linked To' section is highlighted with a blue box and shows 'Services Delivered' selected, 'Many' for the cardinality, and '1' for the number of links. Below this, it states 'This is required' and 'record(s) can be linked to each of these records'. The 'Number of Links per page' is set to 5. Under 'Special Properties', 'Same Folder Linking' and 'Wizard Style' are checked. At the bottom of the dialog are 'Delete' and 'Apply' buttons. On the right, the user profile 'Annie Novacek' is shown, along with a 'Field Choices' list and a 'Requirements' section indicating that the 'Services Delivered' field has unset special properties.

# How to Configure

## Step 5: Start Collecting Data.

Service Tracking

Alicia Henry  
Quick View Information ▶

Main ▾

\*Date of Service  
08/15/2024 📅

\*Services Delivered  
 Hide Deactivated Links + New

\*Time Spent (in Hours)  
0.0

System Fields ▶

Service Tracking

Alicia Henry  
Quick View Information ▶

Main ▾

\*Date of Service  
08/15/2024 📅

\*Services Delivered  
 Hide Deactivated Links + New

Services Delivered	Link Info		
Services ▾	Active	Delete	Date ▾
Case Management	<input checked="" type="checkbox"/>	🗑️	Added on 08/15/2024
Counseling	<input checked="" type="checkbox"/>	🗑️	Added on 08/15/2024
Legal Services	<input checked="" type="checkbox"/>	🗑️	Added on 08/15/2024

Total Active Links:3, Total Deactivated Links:0, Current Active Links:3, Current Deactivated Links:0

\*Time Spent (in Hours)  
1.50

System Fields ▶



# Managing Linked Records

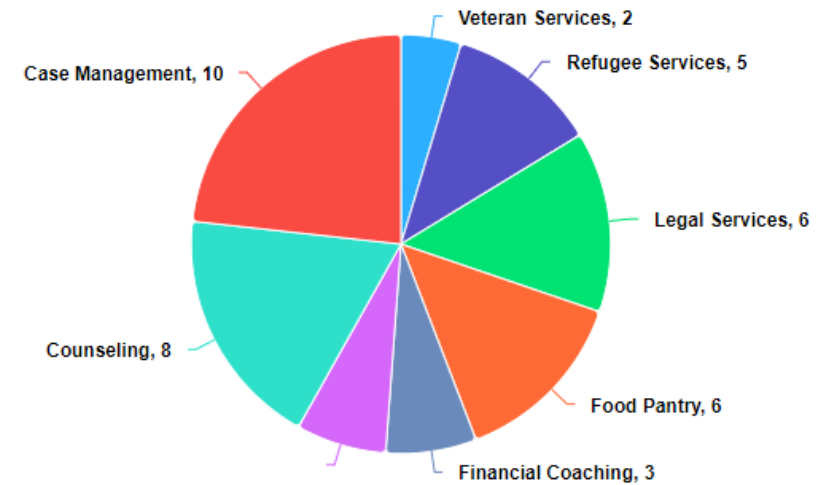
While this is designed to look like we have created one record, multiple will exist within Apricot. If you need to archive any of these Tier 2 records for whatever reason, take care of the sub records first and then the main form records.



# 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!

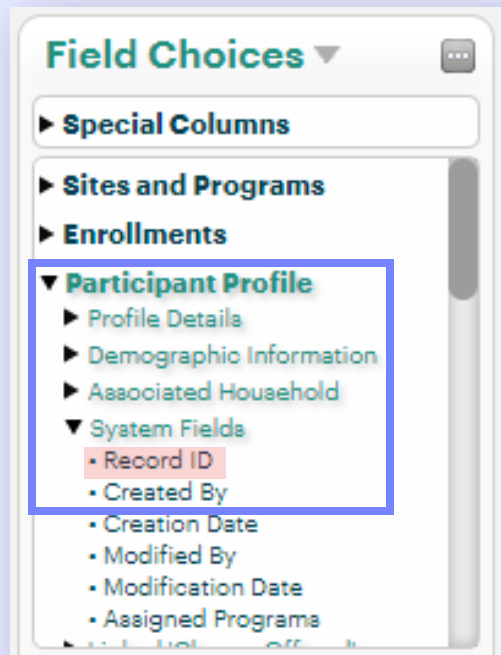


▶ Case Management	Row Count	<b>10</b>
▶ Counseling	Row Count	<b>8</b>
▶ Disaster Relief	Row Count	<b>3</b>
▶ Financial Coaching	Row Count	<b>3</b>
▶ Food Pantry	Row Count	<b>6</b>

# Reporting on Multi-Service

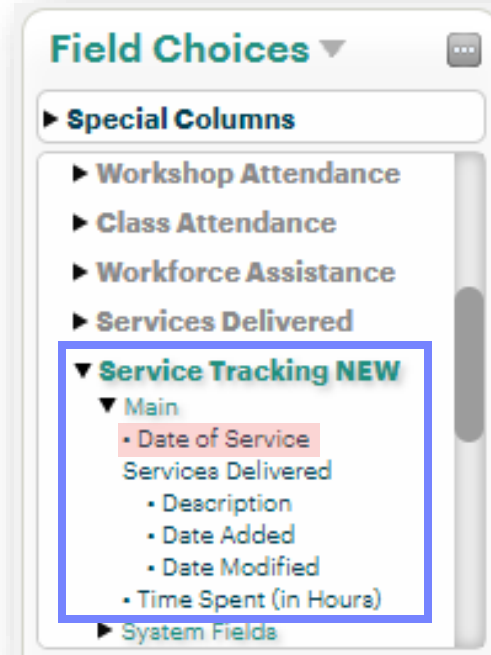
## Step 1: Pull in data from Tier 1.

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



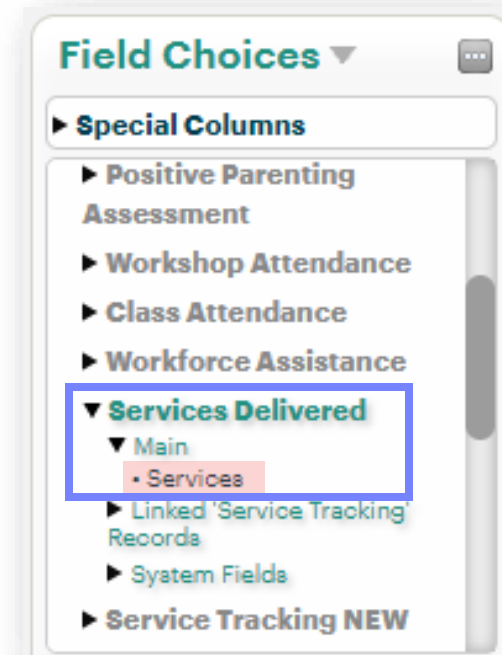
## Step 2: Pull in data from Main Tier 2.

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



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

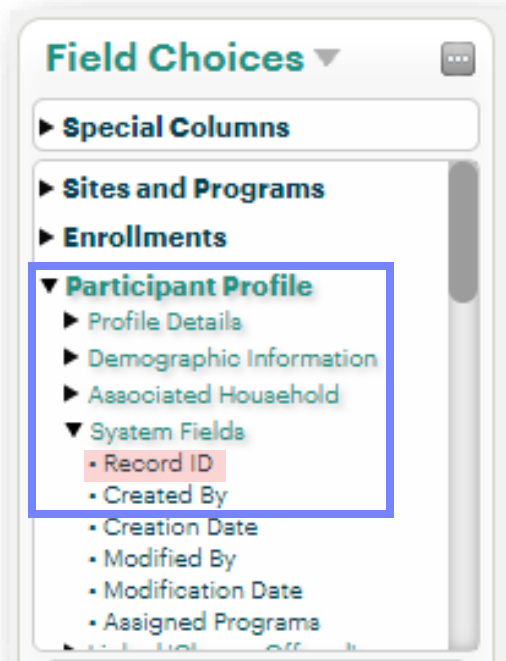
- Grab the option field with Service.
- No other data needed here.



# Reporting on Multi-Service

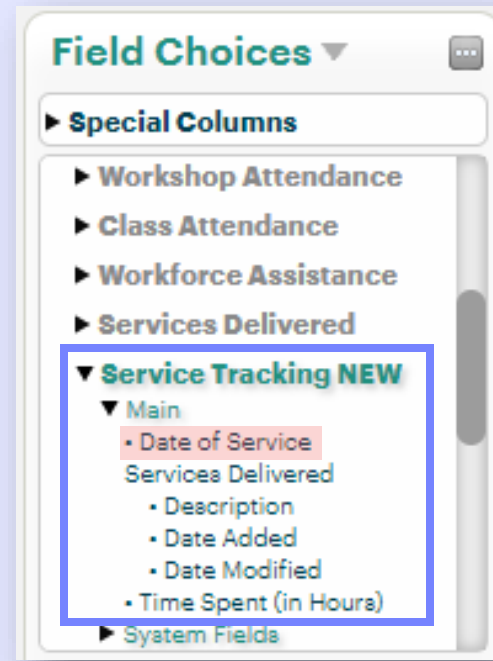
## Step 1: Pull in data from Tier 1.

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



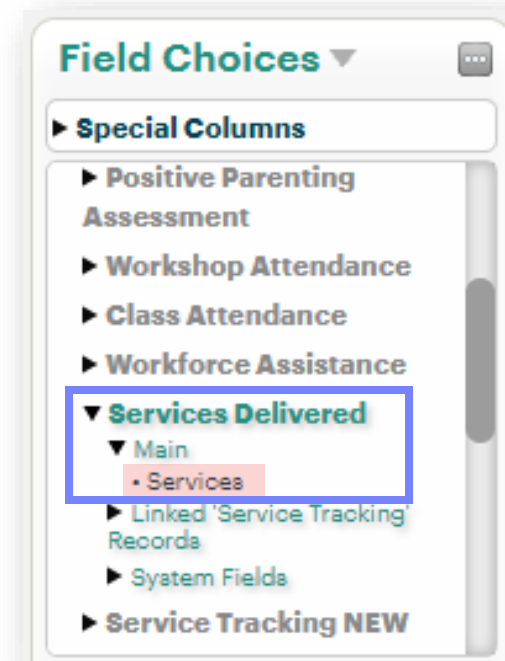
## Step 2: Pull in data from Main Tier 2.

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



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

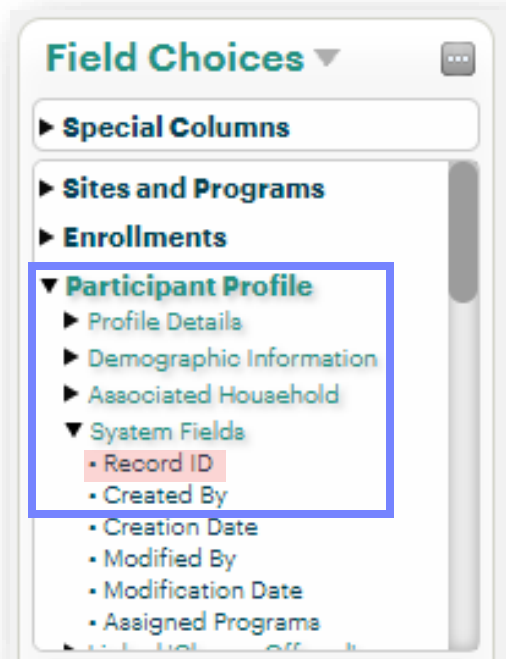
- Grab the option field with Service.
- No other data needed here.



# Reporting on Multi-Service

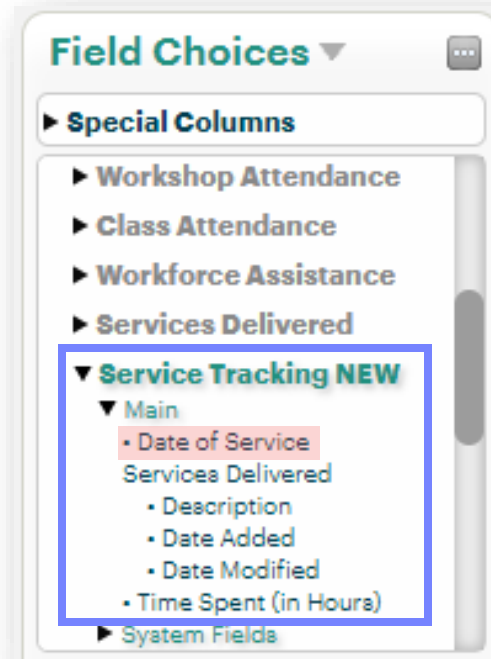
## Step 1: Pull in data from Tier 1.

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



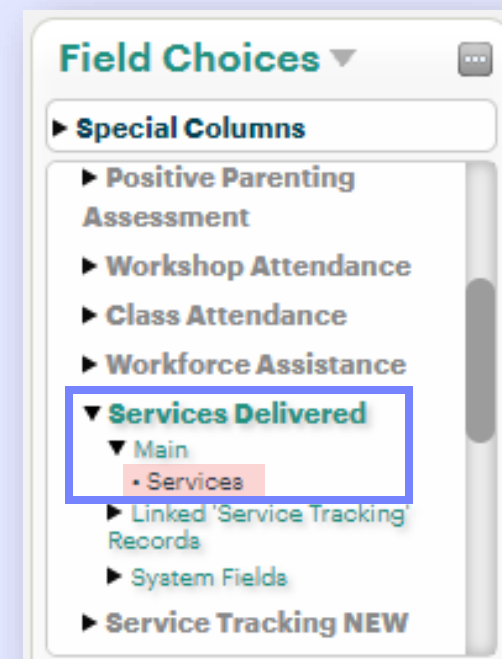
## Step 2: Pull in data from Main Tier 2.

- 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.



# 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!

The screenshot displays the Bonterra reporting interface. On the left, a 'Forms' list is visible with three items: 'Participant Profile (Always)', 'Services Delivered (Always)', and 'Service Tracking NEW (Always)'. A blue arrow points to the 'Services Delivered (Always)' form. A modal dialog box titled 'Services Delivered Form Properties [highlight]' is open, showing configuration options. The 'Connected To' section has 'Service Tracking NEW' selected. The 'Using Field' section has 'Services Delivered (linking)' selected. The 'Required' section has 'Always' selected. The 'Limit' section has 'None' selected. There are also checkboxes for 'Enforce Programs filter (where applicable)' and 'Enforce User Level Access filter (where applicable)', both of which are checked. At the bottom of the dialog are 'Delete' and 'Apply' buttons.

# 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)

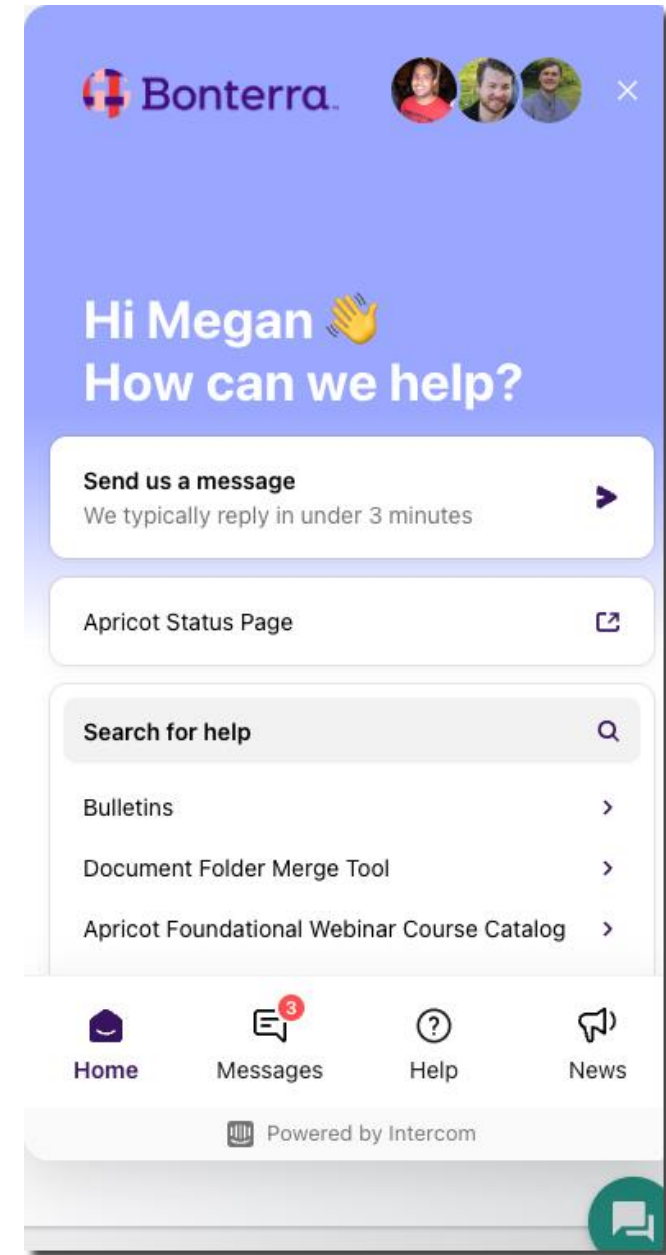


Build confidence & knowledge in  
our software!

# 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](mailto: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.