

How to Create Dynamic Dropdowns with Smart Lists

Welcome, we will start shortly!

Meet Your Trainer

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Learning Objective

By the end of this session, our goal for you is to know how and when to incorporate Smart Lists into your Apricot workflow for a dynamic and relevant experience.

Agenda

Overview

How to Configure

Limitations

Reminders

Overview

Smart Lists Overview

Create questions using your own data for dynamic lists of answer choices.

Benefits:

- Relevant list based on your data and filters.
- Does not require a Services project to enable.
- Requires less ongoing maintenance by Admins.

Caseworker Profile

Caseworker Profile Search

-- Add Search Field -- ▼ [Browse All](#)

The following 5 Caseworker Profile records are available

Caseworker Name ▼	Status ▼
Wanda Workforce	Active
Carrie Caseworker	Active
Kevin Case	Active
Sarah Socialworker	Inactive
Catrina Counselor	Inactive

Program Enrollment and Exit

Alicia Henry
[Quick View Information ▶](#)

Enrollment Information ▼

Complete this record when a client enrolls in a new program. When the client exists the program, open this record and fill in the Exit information below. All services received during this enrollment period should be linked to this record.

***Program**

***Enrollment Date**

***Assigned Caseworker**

Smart List Use Cases

Caseworkers
/ Staff

Volunteers

Classes /
Workshops

Events

Programs

Services

Referral
Partners

Employers

Option Field Comparison



Option Field

- Static list of answer choices.
- Must be created & edited at the field level for each form.
- Several different field formats to choose (Single & Multi-Select, Masked & Non).

Radio Button: Gender

- Female
- Male
- Non-Binary

Dropdown: Gender

Checkboxes: Gender

- Female
- Male
- Non-Binary



Lookup List

- Preset static list of answer choices to use in multiple fields & forms.
- Edits apply to all places used.
- Different field format options.
- Form Logic can create a dynamic experience by customizing which list is shown based on answers to other fields.

Gender (simple lookup list)

Used In ▾

New Form

- Radio Button: Gender
- Dropdown: Gender
- Checkboxes: Gender

Build Lookup List ▾

Display Value

Female
Male
Non-Binary

Option Field Comparison

Linking Field



- Similar to Smart List by referencing data in another form for list of answer choices.
- Requires more clicks to fill out.
- Recommended if you need to report on more data from both the source & linked record.
- Makes reporting more complex.

***Date of Service**
09/05/2024

*** Services Delivered**

Services Delivered

Services ▾

Legal Services

Counseling

Case Management

Total Active Links:3

***Time Spent (in Hours)**
2

Smart List



- Dynamic list of answer choices based on source data & filters.
- List updates as records are created & edited.
- Single Select Dropdown format only.
- Less complex than linking.

Field Properties (smart list)

Display Name
Assigned Caseworker

Standard Properties

Required

Quick View

Restricted

Form & Field Properties

Secure Field (role permission)

Smart Field Presets
Caseworkers ▾

Don't see your preset? [Refresh](#)

(NOTE: Create link will open in ...)

How to Configure

How to Configure

Step 1: Choose or Set Up Source Form.

Step 2: Create Smart Field Preset.

Step 3: Apply Preset to Smart List Field.



How to Configure

Step 1: Choose or Set Up Source Form.

- Records entered provide answer choices.
- Recommend including fields for filtering.
- Can be Tier 1 or Tier 2.

Caseworker Profile

COLLAPSE ALL

Caseworker Details ▾

***Caseworker Name**

First Middle Last

***Status**

Active

Inactive

Email

***Department**

Counseling

Case Management

Disaster Relief

Financial Coaching

Food Pantry

Legal Services

Refugee Services

Veteran Services

How to Configure

Step 2: Create Smart Field Preset.

- Set descriptive name.
- Choose source form.
- Indicate data point to show in list.
- Add optional filters (up to 4).
- Use Preview to check data & speed.

Smart Field Preset

✕ EXIT

Preset Details * Required

NAME *

Form & Field Properties * Required

Choose the source form... *

 | ▾

Select a Tier 1 or Tier 2 form. Records associated with that form will display in the smart field.

Choose the primary field to display... *

 | ▾

Select a field from the form chosen above. The record information collected via that field will display in the smart field.

Optional Field Filters

If you would like to filter the records displayed in your smart field, create up to 4 filters here.

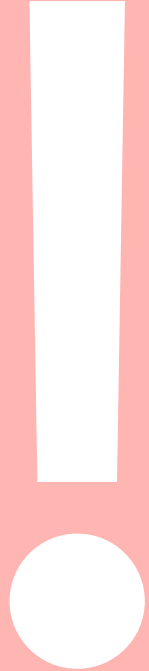
[Add A Filter](#)

Cancel **RECOMMENDED:** Preview before saving. Preview Save Preset

Preset Speed

The **Preview** option will help you gauge performance. If the preset says it's running slow, contact our Support team.

- Test during normal business hours for true performance.
- Filters that narrow down the list can help speed.



How to Configure

Step 3: Apply Preset to Smart List Field.

- Select an existing Smart Field Preset or click to create new.
- Field type is limited to single select dropdown.
- Users filling out this form must have access to source.

The screenshot shows a configuration window titled "Field Properties (smart list)". It contains the following sections and controls:

- Display Name:** A text input field containing "Smart List".
- Standard Properties:** A group of checkboxes including:
 - Required
 - Duplicate Check
 - Locked
 - Quick View
 - Searchable
 - Hidden
 - Restricted
 - Clear On Copy
- Form & Field Properties:** A checkbox for "Secure Field (role permissions required to view information)".
- Smart Field Presets:** A dropdown menu currently showing "Caseworkers".
- Links:** Text with links: "Don't see your preset? [Refresh the preset list](#) or [Create a new Smart Field Preset](#) (NOTE: Create link will open in a new browser tab)".
- Tooltip:** An empty text input field.
- Buttons:** "Delete" and "Apply" buttons at the bottom right.

Limitations

Limitations

Smart Fields cannot be:

- Set as a Form's "Record Name"
- Used with System Fields
 - *Exception: "Assigned Programs" can be a filter*
- Used with Auto Populate fields
- Used in Form Logic
- Used in Email Triggers
- Used in Duplicate Check
- Made Searchable
- Made Quick View
- Used in Imports
- Completed in Connect
- Used in Registration Grid



Reminders

Reminders

1. Remember to Preview when building a Preset.

The screenshot shows a 'Form & Field Properties' window with a 'Smart Field Preview' modal open. The modal displays a table with four rows of names: Vera Volunteer, Anita Alexander, Gail Garrison, and Tom Thornton. Below the table is a 'Close Preview' button. The background shows a filter configuration for 'Filter 1' with the condition 'Available is equal to Yes' and an 'Add A Filter' button.

Form & Field Properties * Required

Smart Field Preview

4 Field Options returned in: 0.025 seconds (Fast) ?

*Only the first 10 rows will be returned in the preview.

Vera Volunteer
Anita Alexander
Gail Garrison
Tom Thornton

[Close Preview](#)

Filter 1 [Remove](#)

Available | is equal to | Yes

[Add A Filter](#)

Reminders

1. Remember to Preview when building a Preset.
2. Filters make your Smart Lists more dynamic.

Optional Field Filters

If you would like to filter the records displayed in your smart field, create up to 4 filters here.

Filter 1 [Remove](#)

Available | ▼ is equal to | ▼ Yes | ▼

Filter 2 [Remove](#)

Select... | ▼

Filter 3 [Remove](#)

Select... | ▼

Filter 4 [Remove](#)

Select... | ▼

[Add A Filter](#)

Reminders

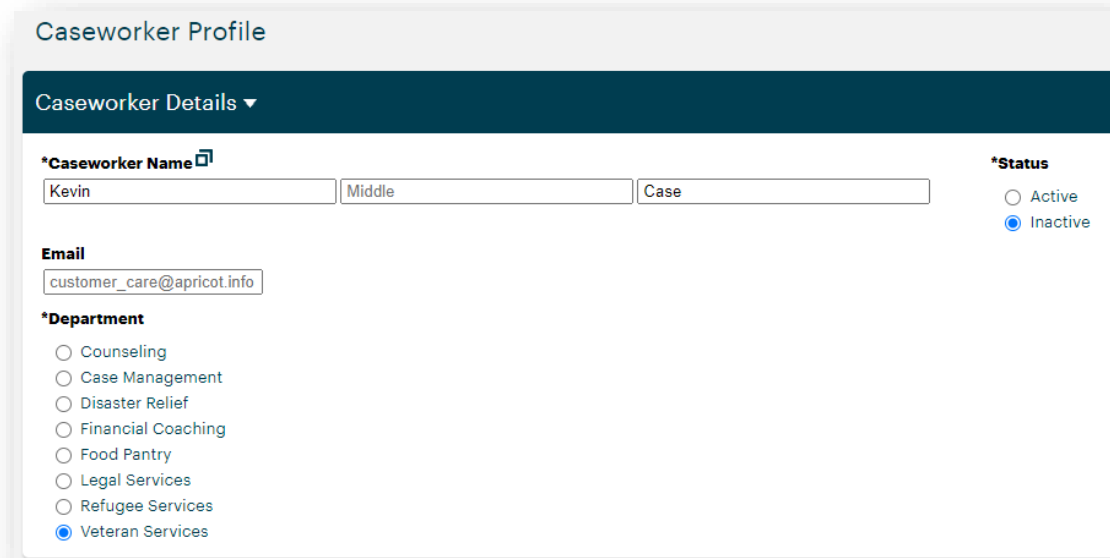
1. Remember to Preview when building a Preset.
2. Filters make your Smart Lists more dynamic.
3. Users must be able to access Source form for list to populate.

The screenshot shows a 'Permissions' interface with a search bar and navigation tabs. The 'RECORDS' section is active, displaying a table of permissions for various actions. The 'FORMS' section is also visible.

FORMS		RECORDS								FORMS
PROG. SPECIFIC	NAME	VIEW	SEARCH	CREATE	EDIT	ARCHIVE	IGNORE PROGRAM ASSIGNMENT	CASELOAD	VIEW SECURE FIELDS	EDIT
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Reminders

1. Remember to Preview when building a Preset.
2. Filters make your Smart Lists more dynamic.
3. Users must be able to access Source form for list to populate.
4. Don't forget to maintain data in Source form.



Caseworker Profile

Caseworker Details ▾

***Caseworker Name**

***Status**

Active

Inactive

Email

***Department**

Counseling

Case Management

Disaster Relief

Financial Coaching

Food Pantry

Legal Services

Refugee Services

Veteran Services

Reminders

1. Remember to Preview when building a Preset.
2. Filters make your Smart Lists more dynamic.
3. Users must be able to access Source form for list to populate.
4. Don't forget to maintain data in Source form.
5. This data is not currently available in Results Reporting.

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)

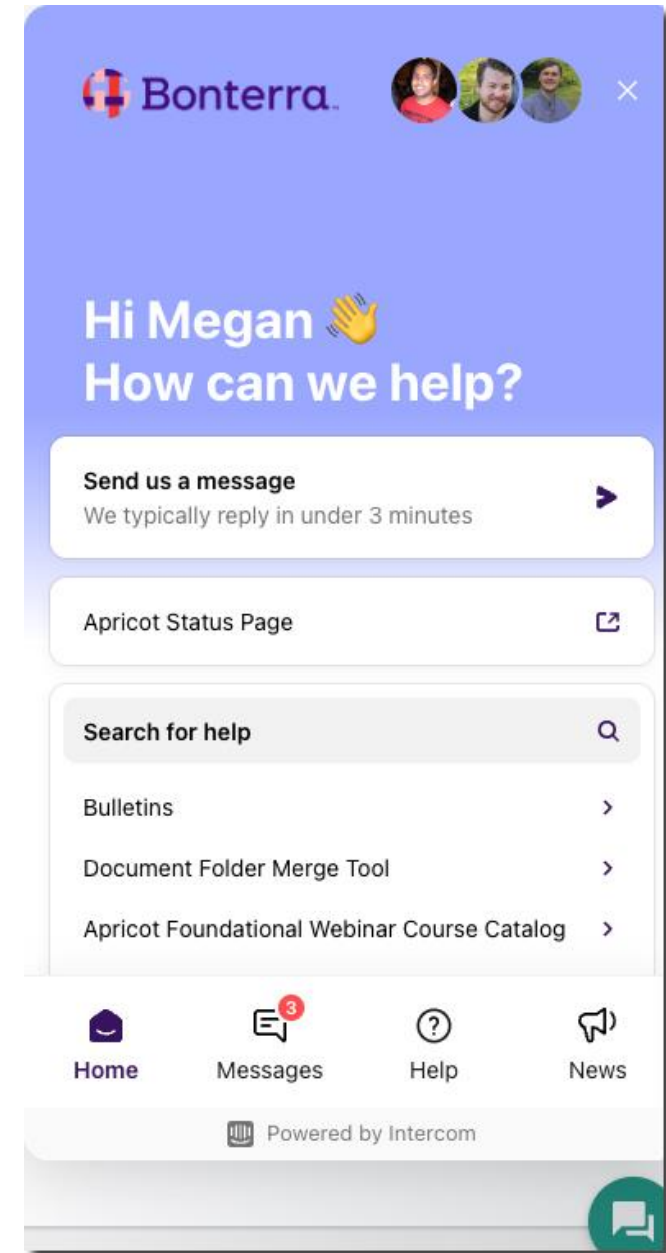


Build confidence & knowledge in
our software!

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



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.