Replacing Fields in Forms

Apricot Targeted Webinar

Bonterra™

Meet Your Trainer

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Learning Objective

This training will cover the best practice process when you need to replace a field in your form with a different field type.

For example, this would be applicable if you needed to change a question from single select, to multi-select.

Agenda

- Use Cases
- Modifying Forms

Use Cases

Use Cases

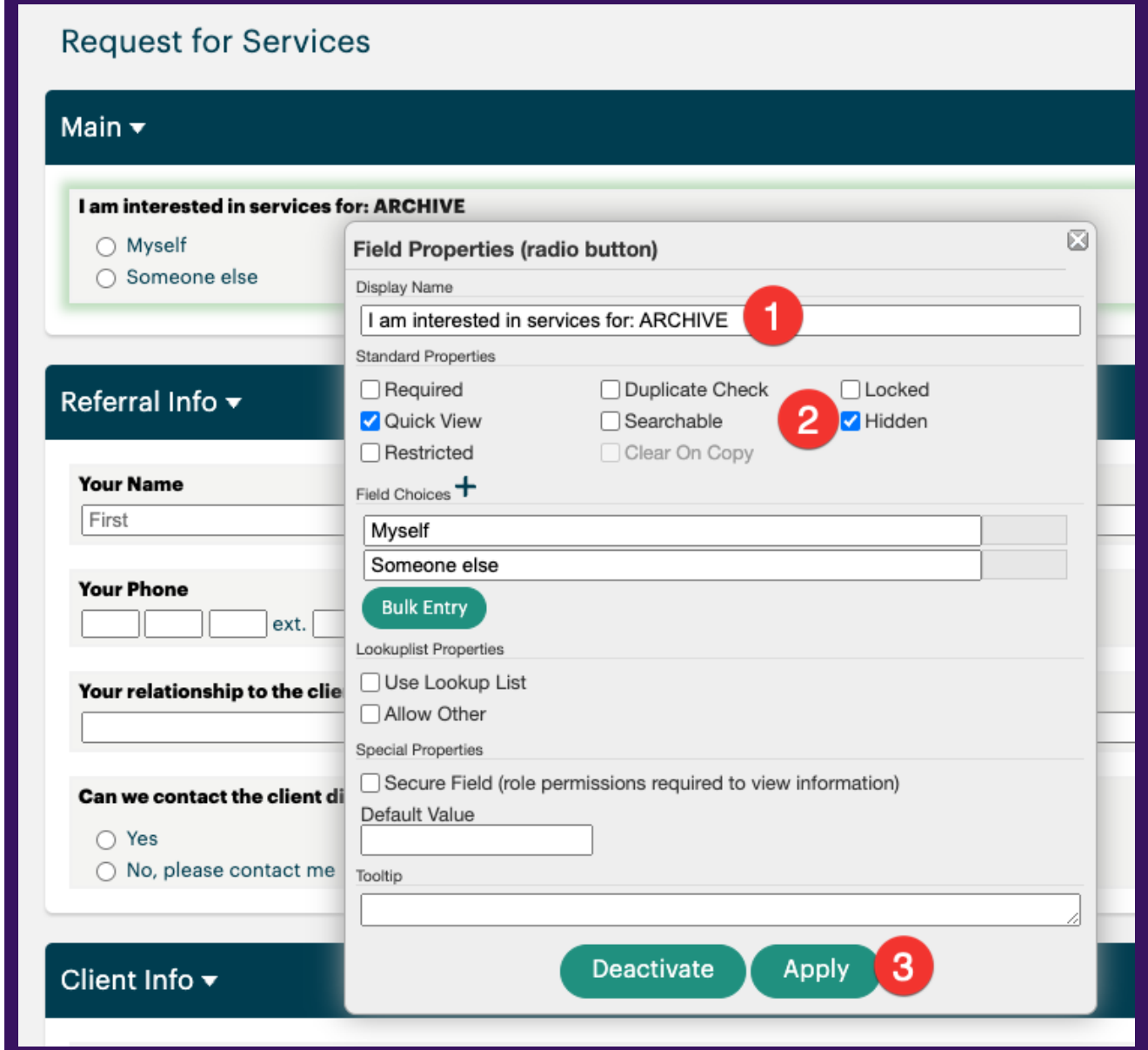
- Improving data integrity by changing the format of a field
  - A text box to a drop-down field
  - A text box to a pre-formatted field ie. Phone number or address
  - Updating a field to a newly released field option

These changes may need to be made as your funder reporting requirements, and agency needs evolve!

Modifying Your Form

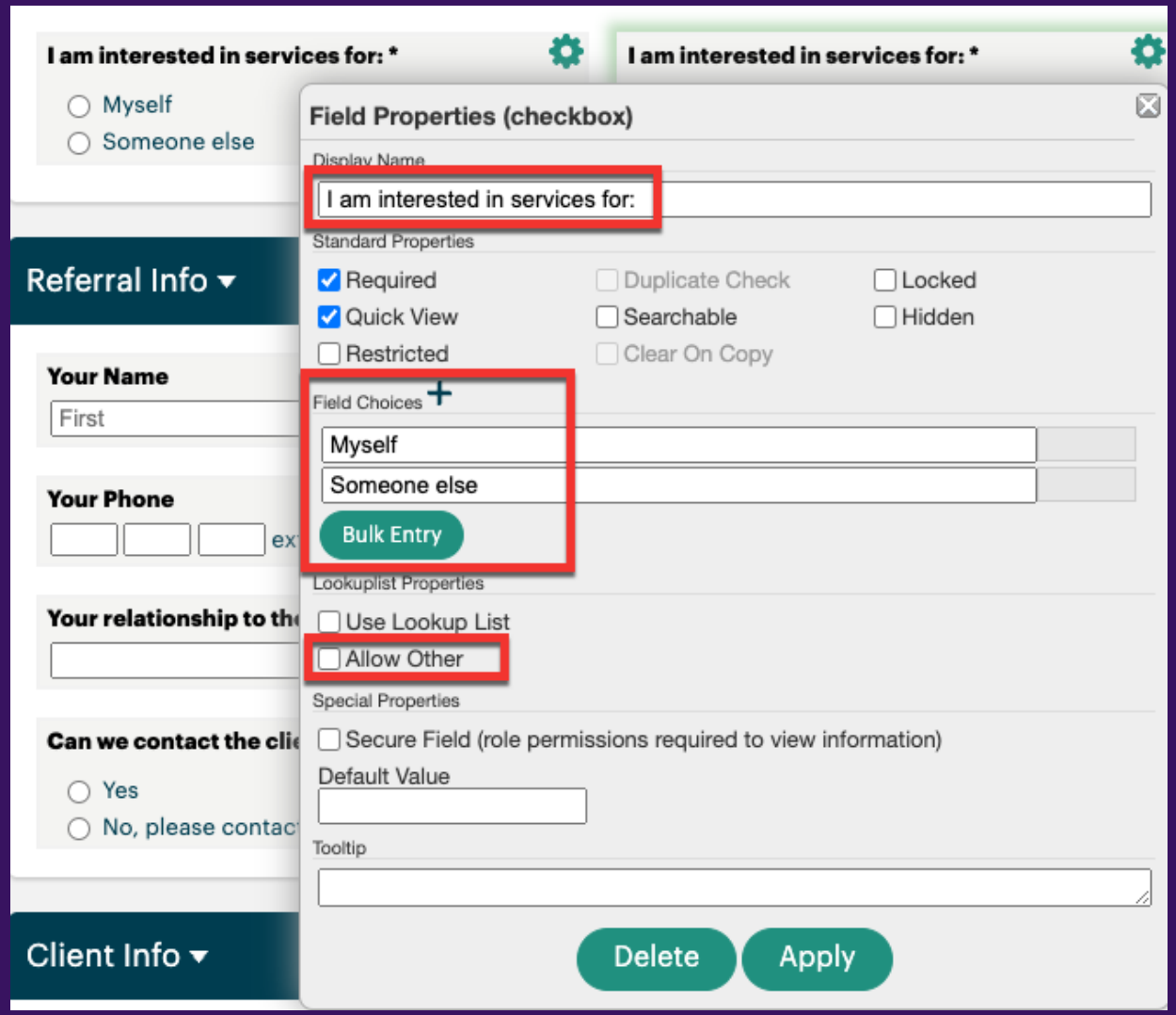
Modifying the Form

- Navigate to the form you wish to Edit
  - Change the name of the previous field to distinguish between the two (add “archive” after the original)
- Check off the "Hidden" checkbox under Standard Properties
- Select "Apply"



Modifying the Form

- Add the new field from Field Choices palette
- Ensure the answer options match the original question
  - Use Bulk Entry, and copy paste from the original question for consistent formatting
  - If you have different/additional answer, select “Allow Other” or follow steps in best practice for changing verbiage
- Publish the form



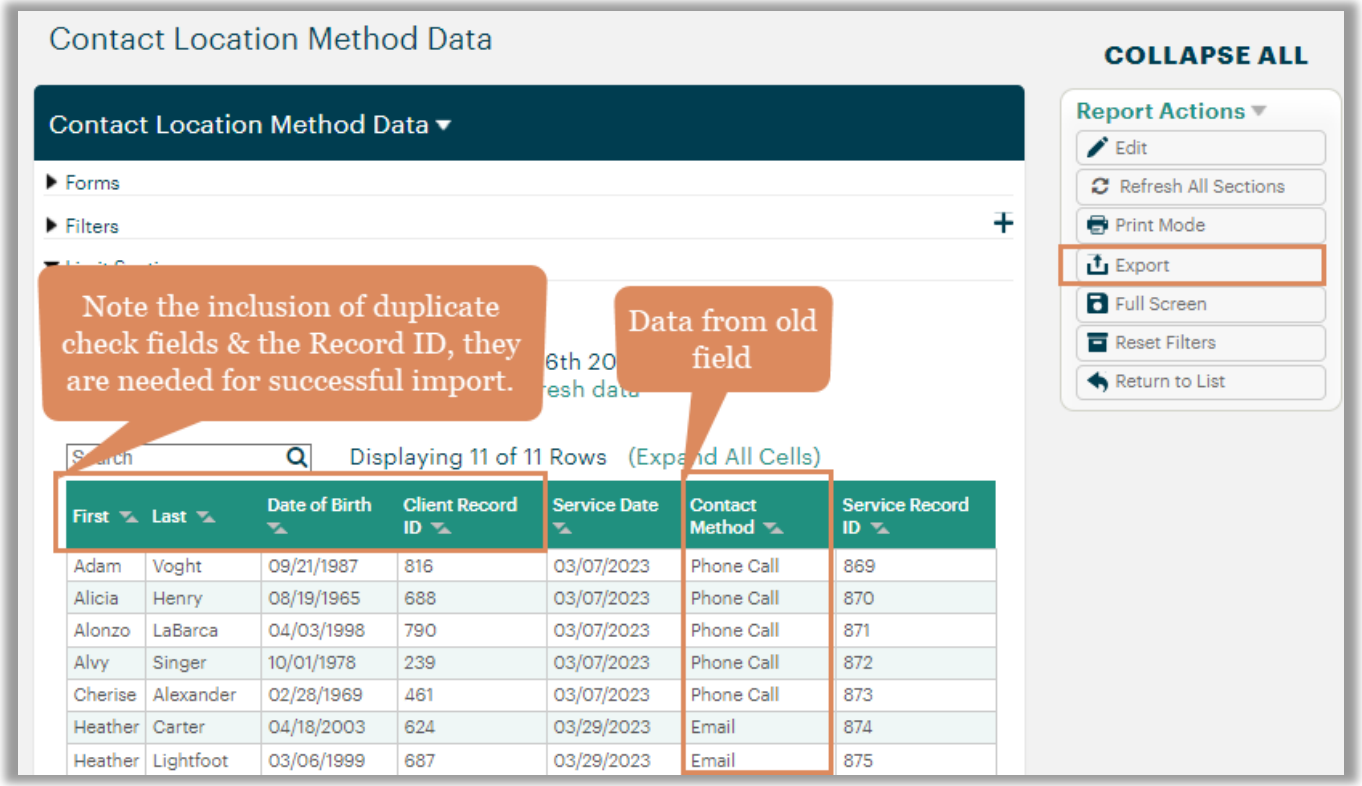
Next Steps

2 Options:

- Report on Old field to see records created prior to the date the change is made.

OR

- Run a Report to export existing data to Excel.
  - Use Import Tool to upload existing data into new field.



Additional Resources

Additional Training Opportunities

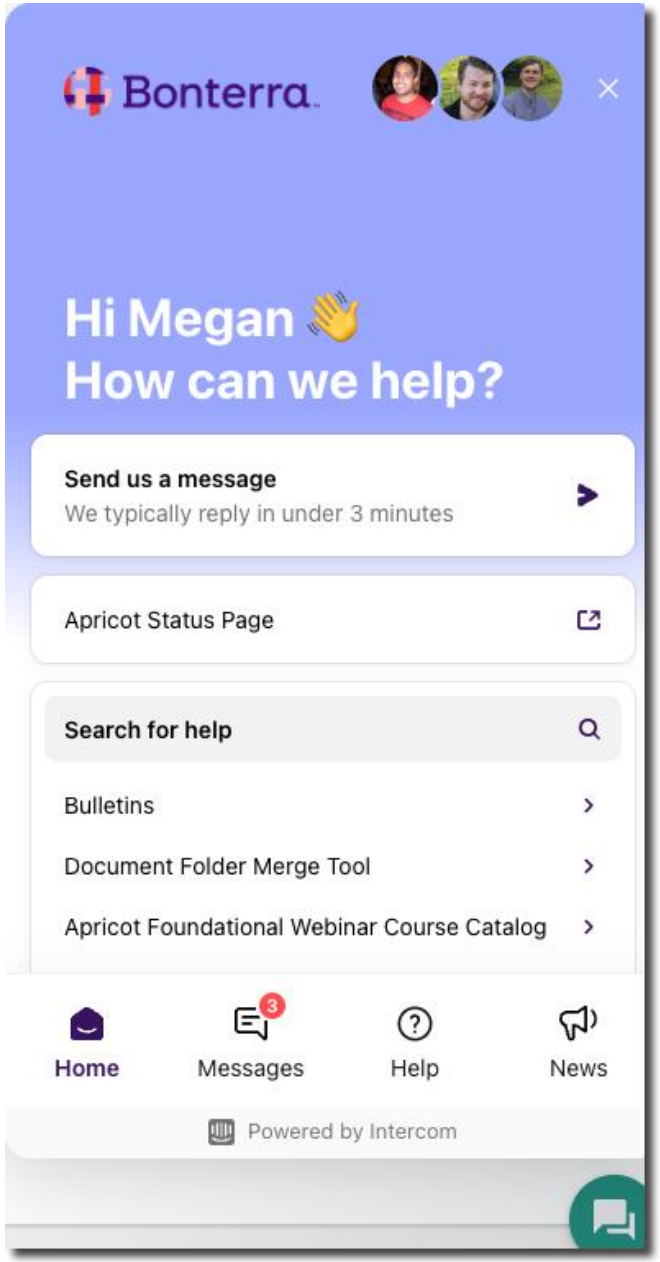
- Knowledge Base – How-To Articles (Search Chat or Visit Online)
- Bonterra Academy – Free Webinars & Recordings
- Foundations – Intensive, Multiday Courses to Cover Admin Basics
- Admin Labs – 2 Hour Live Trainings on Specific Capabilities
- Private Training – 1:1 Sessions with Training Expert in Your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

Bonterra™