

Replacing Fields in Forms

Apricot Targeted Webinar



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"

Request for Services

Main ▾

I am interested in services for: ARCHIVE

Myself
 Someone else

Referral Info ▾

Your Name
First

Your Phone
 ext.

Your relationship to the client

Can we contact the client directly?
 Yes
 No, please contact me

Client Info ▾

Field Properties (radio button)

Display Name
I am interested in services for: ARCHIVE 1

Standard Properties

Required Duplicate Check Locked
 Quick View Searchable 2 Hidden
 Restricted Clear On Copy

Field Choices +

Myself
Someone else

Bulk Entry

Lookuplist Properties

Use Lookup List
 Allow Other

Special Properties

Secure Field (role permissions required to view information)

Default Value

Tooltip

Deactivate Apply 3

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

I am interested in services for: *

Myself
 Someone else

Field Properties (checkbox)

Display Name
I am interested in services for:

Standard Properties

Required
 Quick View
 Restricted
 Duplicate Check
 Searchable
 Clear On Copy
 Locked
 Hidden

Field Choices +

Myself
Someone else

Bulk Entry

Lookuplist Properties

Use Lookup List
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Special Properties

Secure Field (role permissions required to view information)

Default Value

Tooltip

Delete Apply

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.

6th 20
resh data

Displaying 11 of 11 Rows (Expand All Cells)

| First | Last | Date of Birth | Client Record ID | Service Date | Contact Method | Service Record ID |
|---------|-----------|---------------|------------------|--------------|----------------|-------------------|
| Adam | Voght | 09/21/1987 | 816 | 03/07/2023 | Phone Call | 869 |
| Alicia | Henry | 08/19/1965 | 688 | 03/07/2023 | Phone Call | 870 |
| Alonzo | LaBarca | 04/03/1998 | 790 | 03/07/2023 | Phone Call | 871 |
| Alvy | Singer | 10/01/1978 | 239 | 03/07/2023 | Phone Call | 872 |
| Cherise | Alexander | 02/28/1969 | 461 | 03/07/2023 | Phone Call | 873 |
| Heather | Carter | 04/18/2003 | 624 | 03/29/2023 | Email | 874 |
| Heather | Lightfoot | 03/06/1999 | 687 | 03/29/2023 | Email | 875 |

COLLAPSE ALL

Report Actions

- Edit
- Refresh All Sections
- Print Mode
- Export**
- Full Screen
- Reset Filters
- Return to List

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)

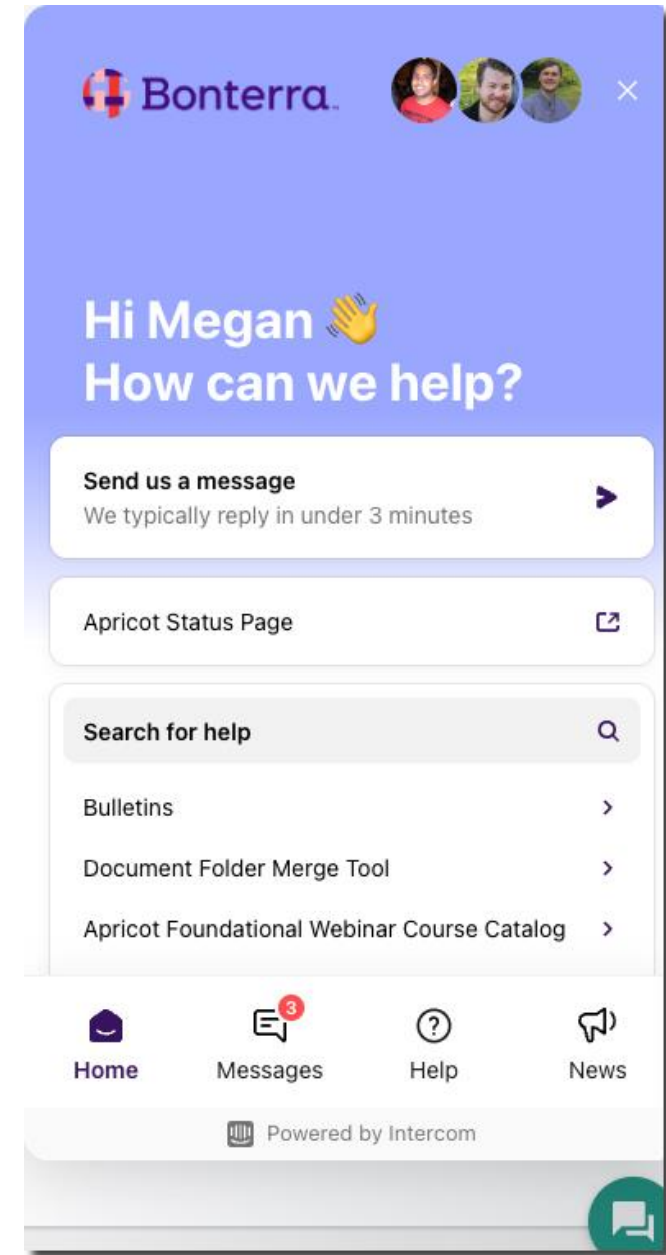


Build confidence & knowledge in
our software!

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.