

Managing Inventory in Apricot

Beds/Rooms, Item Borrowing and Distribution

Welcome, we will start shortly!

Meet Your Trainer

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Learning Objective

By the end of this session, our goal is to equip you to track physical resources you provide to your Participants with the Inventory feature in Apricot.

Agenda

Overview

Configuration

Managing Items

Best Practices

Overview

Inventory Overview

- Ability to track physical resources:
 - Bed / Room Reservations
 - Technology Borrowing
 - Food & Clothing Distribution
- Includes Dashboard for insights (US Only)
- Available for Apricot Enterprise (360)

The screenshot shows the Apricot 360 web application interface. At the top, the logo 'apricot 360' is visible, along with the user role 'MY APRICOT ADMINISTRATOR' and site information 'All Sites Program All Programs'. A navigation menu on the left includes 'Dashboard' (marked 'NEW!'), 'Inventory', 'Search Records', and 'My Apricot Tools'. The main content area is titled 'Inventory' and has tabs for 'INVENTORY' and 'RETURNS'. Under the 'INVENTORY' tab, there is a 'Home (All Items)' section with a list of categories: Household Items, Appliances, Furniture, Housing, ABC Apartments, and Building 1. To the right, a table displays the status of various items:

Home (All Items)	
Apartment 1A	● 1 Available
Apartment 2A	● 1 Available
Bed 1	● 1 Available
Bed 2	● 1 Available
Bed 3	● Unavailable

Configuration

How to Configure Inventory

My Apricot > Inventory

Step 1: Select Recipient Tier 1.

Step 2: Create Categories.

Step 3: Add Items.

Step 4: Start Distributing!



How to Configure Inventory

Step 1: Select Recipient Tier 1.

- Indicate Participant form (only one).
- Map demographic fields.

Feature Configuration

The options selected below will be used to populate features within Apricot.

** All fields marked with * are required*

ATTENDANCE SCHEDULE GENERAL

Participant Information

Information pertaining to the form used to create client records

*For use with:

- Network Referrals feature to accept incoming referrals
- Inventory feature to distribute resources to participants

Primary Tier 1 Form
PARTICIPANT FORM *

Participant Profile | v

PARTICIPANT NAME FIELD *

Participant Name | v

PARTICIPANT DATE OF BIRTH FIELD *

Date of Birth | v

PARTICIPANT PHONE NUMBER FIELD *

Client Phone Number | v

PARTICIPANT EMAIL FIELD

Client Email | v

PARTICIPANT ADDRESS FIELD

Select... | v

PARTICIPANT GENDER FIELD

Gender | v

PARTICIPANT NOTES FIELD

Select... | v

PARTICIPANT QUICK VIEW FIELD

Date of Birth | v

SAVE

How to Configure Inventory

Step 2: Create Categories.

- Method of organizing items.
- Can nest under Parent Category.
- Option to edit once created.
- Can delete, but only if no items out.

New Category

Category Details * Required
CATEGORY NAME*

PARENT CATEGORY
Select... ▼
CATEGORY NOTES

How to Configure Inventory

Step 3: Add Items.

- Name & description.
- Place in Category.
- Mark as Returnable or Non.
- Set quantity available.

New Item

Item Details * Required
ITEM NAME*

PARENT CATEGORY*

ITEM NOTES

IS THIS ITEM RETURNABLE?*
 Yes No

TOTAL QUANTITY*

How to Configure Inventory

Step 4: Start Distributing!

- Item & Quantity.
- Indicate Recipient if Returnable.
 - *Optional for nonreturnable items.*
- Date of Distribution.
 - *Date of Return also optional.*

Distribute

Item to be distributed

Dell 13" Laptop QUANTITY

Select... | v

Recipient * Required

RECIPIENT *

Select... | v

DATE OF DISTRIBUTION * DATE TO RETURN (OPTIONAL)

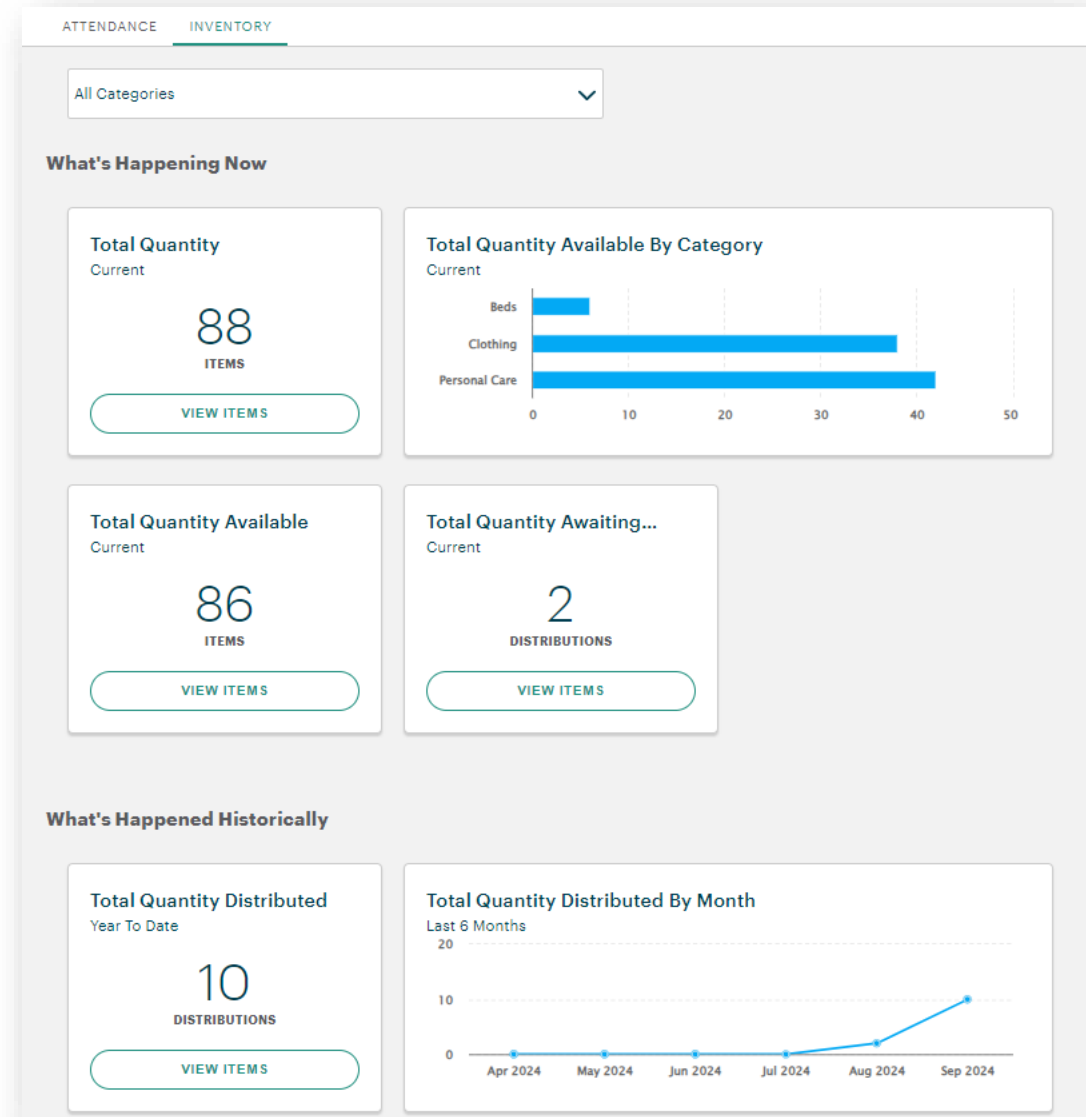
08/29/2024 x -

NOTES

Managing Items

Inventory Dashboard

- Summary of items & status.
- Can filter down by Category.
- Includes current count & historical.



Returning Items

Step 1: Visit Returns Tab or View Individual Item.

Step 2: Click [Return Now] Button.

- Option to mark several Returned in bulk.

The screenshot shows the 'Inventory' application interface with the 'RETURNS' tab selected. At the top right, there are buttons for 'New Item' and 'New Category'. Below the navigation tabs, there is a section titled '4 Items Awaiting Return' with a 'Bulk Action' dropdown and a search box for 'Search Item Name/Recipient'. A table lists the items with columns for checkboxes, item names, recipients, distribution dates, and return dates. Each row has an eye icon and a 'Return Now' button, with the latter being highlighted by a blue box in the original image.

<input type="checkbox"/>	ITEM NAME	RECIPIENT	DISTRIBUTION DATE	↑	DATE TO RETURN		
<input type="checkbox"/>	Business Suit	Elsa Frozen	8/20/2024		--		
<input type="checkbox"/>	Bed 1	Belle Beast	9/3/2024		--		
<input type="checkbox"/>	Crib 1	Belle Beast	9/3/2024		--		
<input type="checkbox"/>	Hair Dryer	Ariel Triton	9/3/2024		--		

The screenshot shows the details for an item, 'Belle Beast', which is marked as 'Unavailable'. It displays 'TOTAL QUANTITY' as 1 and a 'Distribute Now' button. Below this, there is a section for 'Distributed Items (1)'. The 'CURRENT RECIPIENT' is 'Belle Beast'. The 'DATE OF DISTRIBUTION' is '9/3/2024' and the 'DATE TO RETURN' is 'Not Specified'. At the bottom, there are 'Edit' and 'Return Now' buttons, with the latter being highlighted by a blue box in the original image.

● **Unavailable**

TOTAL QUANTITY
1 Distribute Now

⊖ Distributed Items (1)

CURRENT RECIPIENT
Belle Beast

DATE OF DISTRIBUTION: 9/3/2024 DATE TO RETURN: Not Specified

NOTES

Edit Return Now

Adjusting Available Quantity

- Categories & Items can be edited at any time.
- Can only adjust available quantity.

The screenshot displays an inventory management application. On the left, a sidebar lists categories: Clothing, Technology, Cell Phone, Cords, and Laptops. The main area shows a table of items with their current available quantities. A modal window is open for editing the quantity of an item, showing a 'Total' of 200 being changed to 20. The modal also shows 'Available' and 'Unavailable' counts, and a note stating that edits to the total quantity will only affect the available count.

Item Name	Available
Children's Coats	13 Available
Dell 13" Laptop	10 Available
Kid's Socks (L)	9 Available
Kid's Socks (M)	25 Available
Kid's Socks (S)	20 Available
Laptop Charger	15 Available
Men's Coats	10 Available
Nokia Cell Phone	5 Available

Quantity	Total	Available	Unavailable
Total	200 → 20	200	0

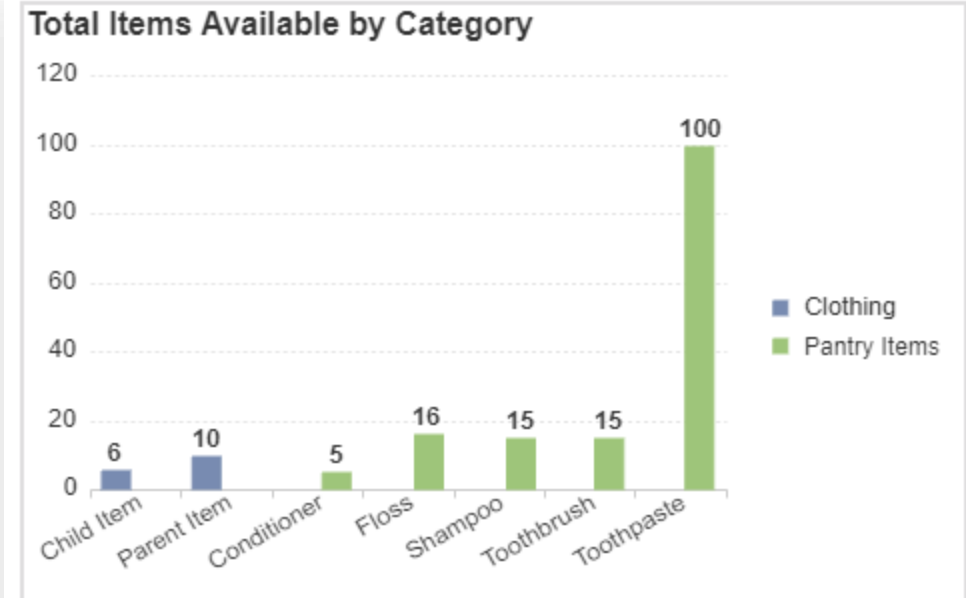
NOTE: Edits to the total quantity will only affect the available count.

Inventory Reporting

- Now available in Results Reporting!
- Select Inventory Universe for this data.

Example Reports:

- Available Quantities by Category
- Distributed Items & Return Data
- Participant Recipients & Returns
- Available Quantity History



CategoryName_Items	ItemName_Items	TotalQuantity_Items	AvailableQuantity_Items
Clothing	Child Item	11	6
Clothing	Parent Item	10	10
Pantry Items	Conditioner	5	5
Pantry Items	Floss	16	16
Pantry Items	Shampoo	20	15
Pantry Items	Toothbrush	15	15
Pantry Items	Toothpaste	100	100

Best Practices

Best Practices

1. For reservations of rooms or beds, these should be created as individual items with identifiable names if you need to track which ones are open, not just how many (i.e. Bed 1, Bed 2, Bed 3).
2. Inventory shows current state, not historical Distributions & Recipients.
3. This feature is designed to track outgoing items, not incoming.
4. Consider using optional Return Date to help with planning available quantity.
5. Inventory data is not available in Native Reporting, but is now available in Results (US only).

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)

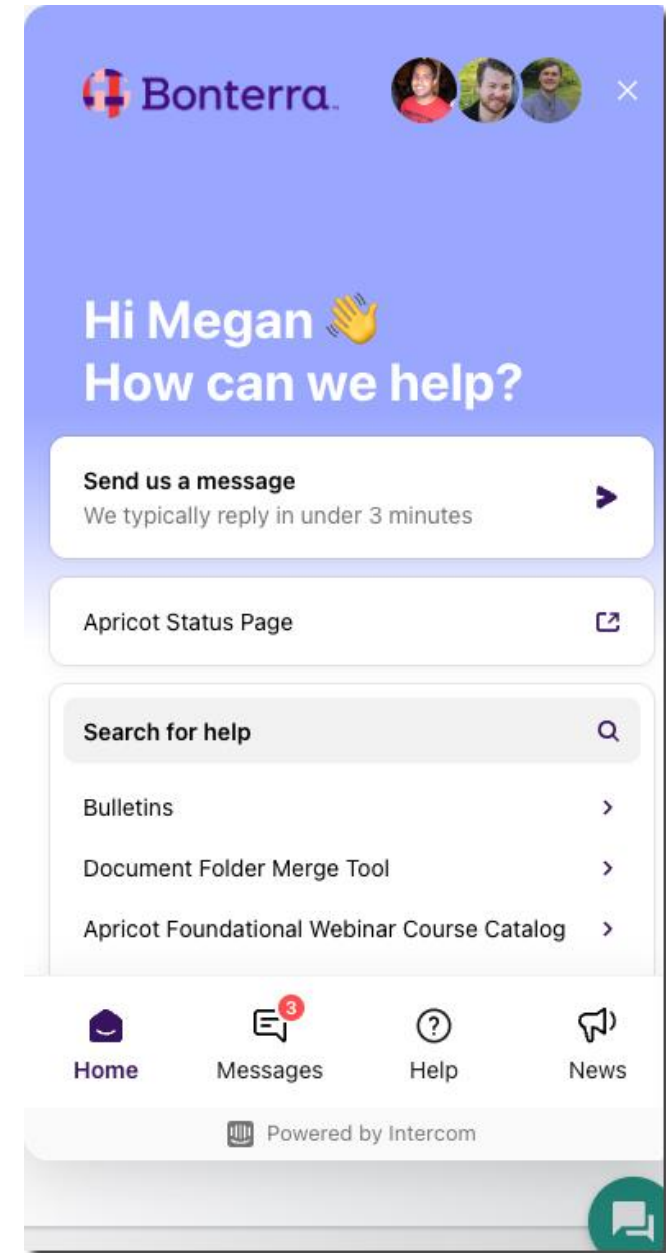


Build confidence & knowledge in
our software!

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.