

Best Practices When Replacing Fields in Forms

Apricot Targeted Webinar

Meet Your Trainer

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Learning Objective

This training will cover the best practices and things to keep in mind when you need to replace a field in your form with a different field type.

Agenda

Considerations When Replacing Fields

Best Practices

Considerations & Best Practices

Things to Consider

- If you wish to change the content or phrasing in your new field, you can use “Find & Replace” in Excel to change all answers to the new terminology prior to importing.
- If you are changing a multi-select answer to a single-select answer, there is additional data clean up required.
- If you have a report that pulls data from the original field, you will need to update that report to now pull from your new field.

Best Practices

- Do a “trial run” with a couple records before importing the entire dataset.
- Use the “Revert” import option if you recognize a mistake has been made or wish to undo the import.
- Following the successful import, build a report to compare the previous field with the new field to ensure all data carried over correctly.

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)

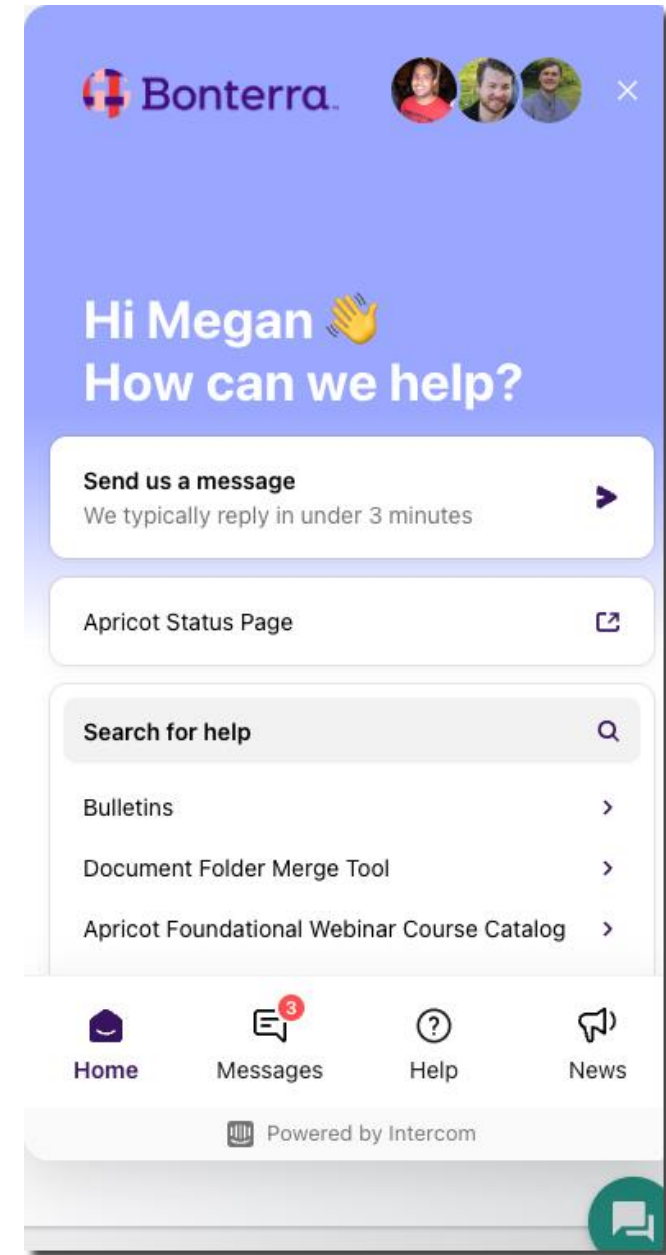


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Weekdays 7am – 7pm CST via chat or through email:
apricot@bonterratech.com



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.