Searching for Records/Record Access

Apricot Targeted Webinar

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Meet Your Trainer

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Learning Objective

This training will cover:
-   Searching Tier 1 Records
-   Understanding Record Access

By the end of this session, the goal is for you to understand how to effectively search through Tier 1 Records and where to find and update record access in Apricot.

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Agenda

Searching Tier 1 Records

Record Access by Program

Program Assignment

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Searching Tier 1 Records

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Search Records

- Easily locate records that meet criteria

- Recommended to avoid duplicate data entry

- Accessible on the 'My Apricot' tab

- Navigate to Search Records on left-hand side

- Select the Tier 1 Form you wish to search through

Search Fields

- Search fields allow you to narrow down results
- Fields marked as "Searchable" will show up in this drop down
- Fields pulled from Tier 1 form and corresponding Tier 2 forms

Tier 1 Search Field

- Searched by "Legal Name" which is a field on the Tier 1 form

- You will now see a list of Participants that meet this criteria

- The mint text will take you directly into their Tier 1 record

- The grey text will take you to their document folder

Tier 2 Search Field

- Searched by "Program Enrolling" which is a field on a Tier 2 form

- You will now see a list of Participants that meet this criteria

- You can see all corresponding Tier 2 records

- The mint text will now take you into the Tier 2 record directly

- The grey text will take you to the document folder

Considerations

- If you are unsure of the exact spelling, use a wildcard value (%) before, after, or around the characters

Considerations

- By default, the Search Records remembers your previous search criteria – use the Clear Search History on the right to remove the fields

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Record Access

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Record Access by Program

- Apricot can have multiple programs

- When a new Tier 1 record is created, it is assigned to a program

- The program you are in will dictate the records you have access to

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Program Assignment

- You may manually assign programs using the "Assigned Programs" button

- The record may automatically be assigned to the site that you are logged into (shown in the middle of your Apricot top bar)

Additional Resources

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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)
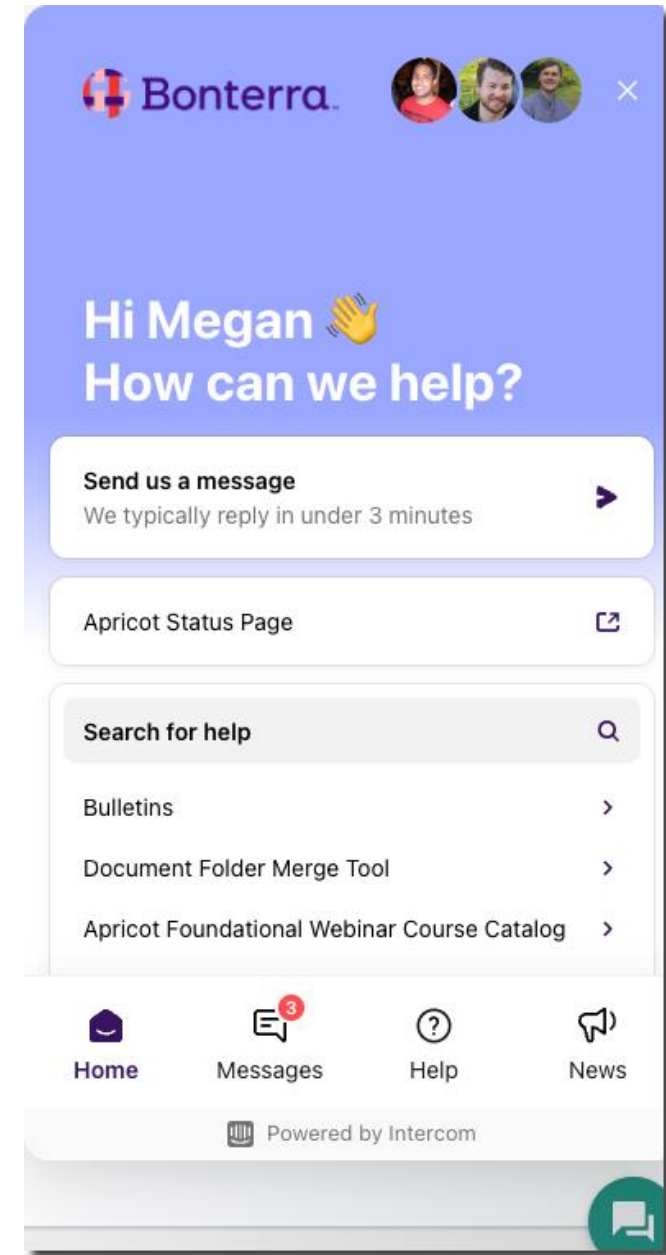

Build confidence & knowledge in our software!

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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!

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Thank you for attending!

We hope to see you
in future trainings.

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