Apricot
Getting Staff Buy-in Webinar

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Meet Your Trainer

First Name Last Name

Training & Development Associate

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Learning Objective

To provide tips, best practices and suggestions for making Bonterra Case Management more user friendly for your staff so that it's easier to encourage your team to use the software.

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Agenda

Field Properties

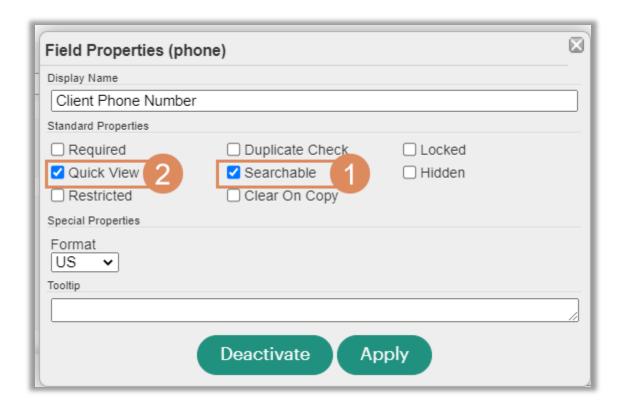Form Properties

Email Triggers

Report Ideas for Staff
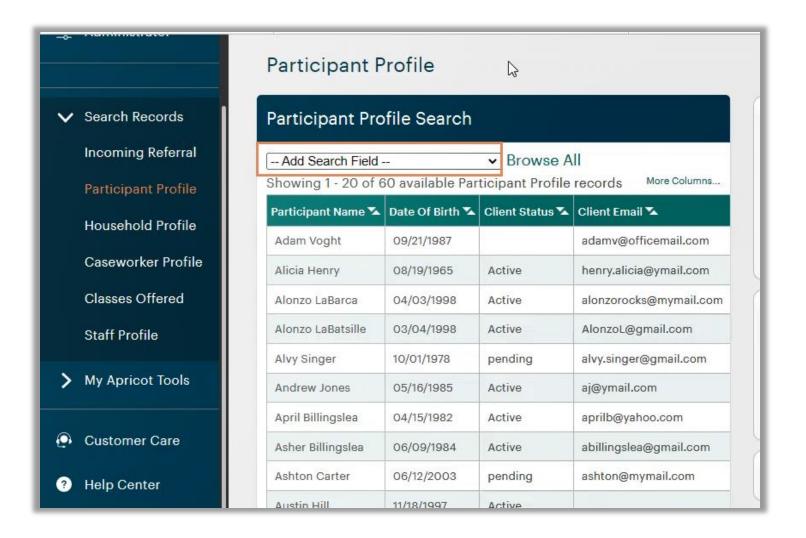
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Field Properties

Field Properties

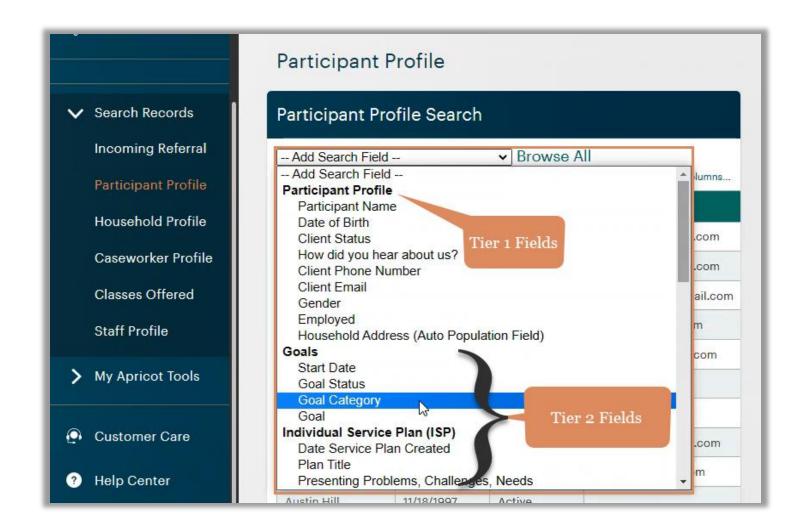## Make Viewing Existing Data Easier

- Searchable

- Quick View

Field Properties - Searchable

- Show in Record Search dropdown

Field Properties - Searchable

- Show in Record Search dropdown
- Include Tier 1 & Tier 2 fields

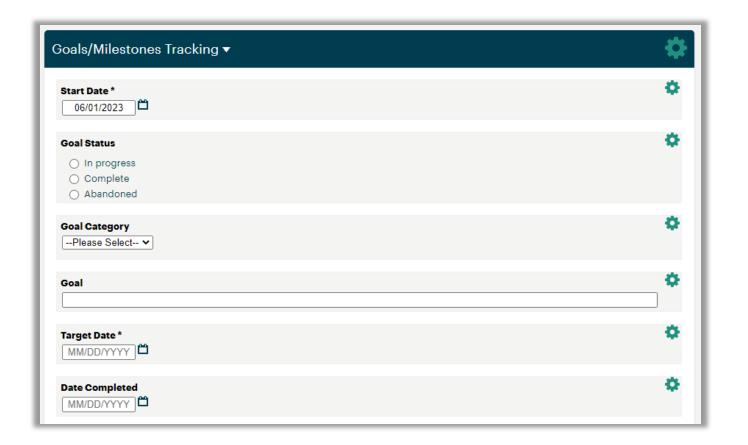# Field Properties - Searchable

- Show in Record Search dropdown

- Include Tier 1 & Tier 2 fields

- Gives Record Search practical application (example: creating invite list for job fair)

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Field Properties - Searchable

Steps

1. Open desired form in Edit view

Field Properties - Searchable
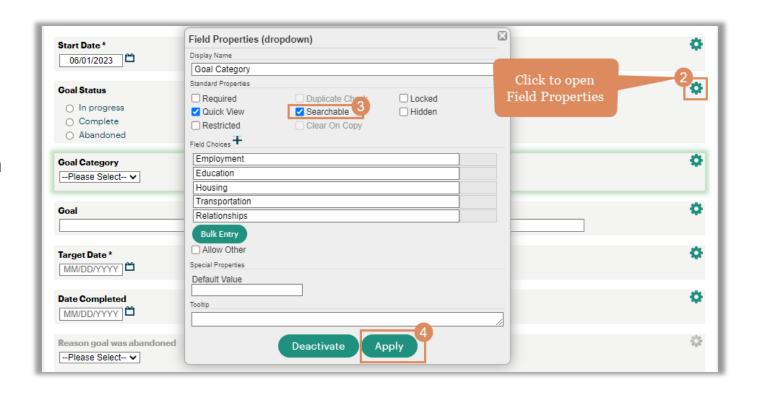
Steps

1. Open desired form in Edit view

2. Open Field Properties for desired field

3. Check box next to the Searchable option
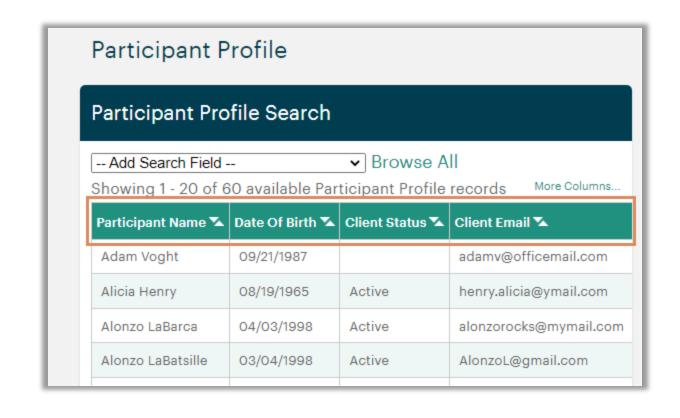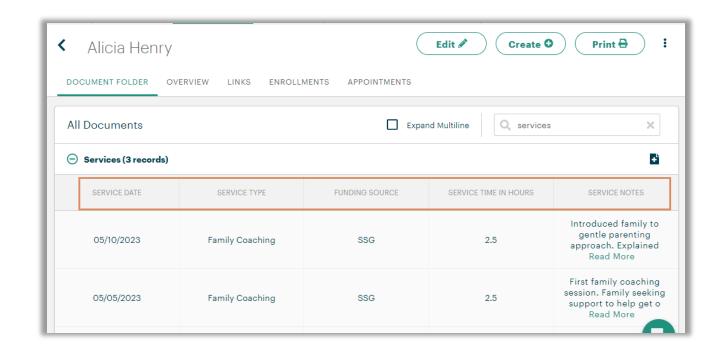
4. Click Apply

5. Publish to save changes

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Field Properties – Quick View

- Makes viewing data easier

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Field Properties – Quick View

- Makes viewing data easier

- Tier 1 data shows on Record Search
  - What might help make search practical?

Participant Profile

Participant Profile Search

-- Add Search Field --   ⌄   Browse All

Showing 1 - 20 of 60 available Participant Profile records   More Columns...

Participant Name ⌄	Date Of Birth ⌄	Client Status ⌄	Client Email ⌄
Adam Voght	09/21/1987		adamv@officemail.com
Alicia Henry	08/19/1965	Active	henry.alicia@ymail.com
Alonzo LaBarca	04/03/1998	Active	alonzorocks@mymail.com
Alonzo LaBatsille	03/04/1998	Active	AlonzoL@gmail.com

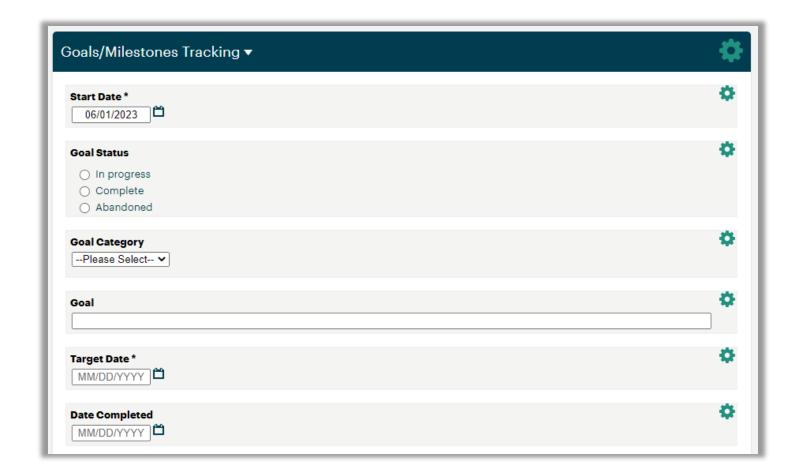Bonterra™

Field Properties – Quick View

- Makes viewing data easier
- Tier 1 data shows on Record Search
  - What might help make search practical?
- Tier 2 data shows preview in Document Folder
  - What might help staff prepare to meet with client?

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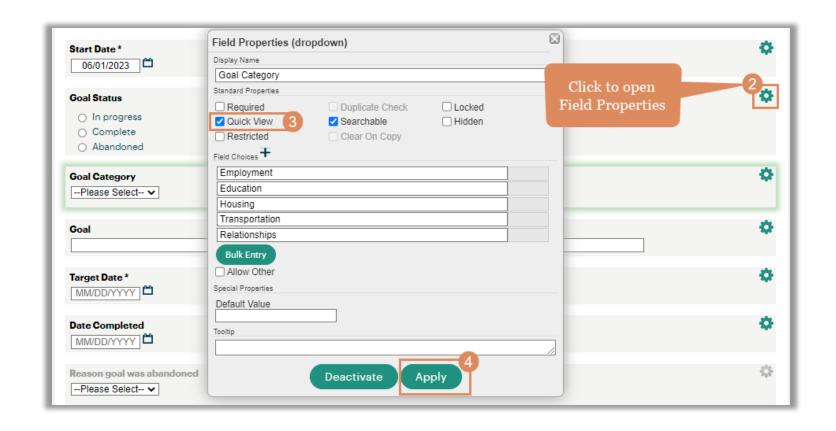# Field Properties – Quick View

Steps:

1. Open desired form in edit view

Field Properties – Quick View

Steps:

1. Open desired form in edit view

2. Open the Field Properties

3. Check the box next to Quick View

4. Click Apply

5. Publish Form

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Form Properties

Form Properties – Batch Records

- Simplifies data entry

Form Properties – Batch Records

- Simplifies data entry

- Track interaction with <u>multiple participants all at once</u>

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Form Properties – Batch Records

- Simplifies data entry

- Track interaction with <u>multiple participants all at once</u>

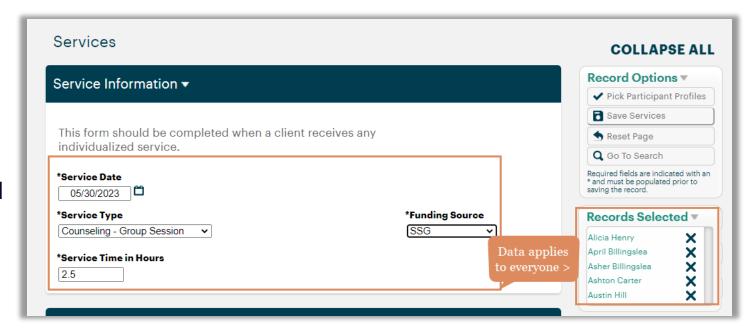- Accessed via Record search

Form Properties – Batch Records

- Simplifies data entry

- Track interaction with <u>multiple participants all at once</u>

- Accessed via Record search

- Data applies to **all** participants selected
  - Update unique data via document folder

Form Properties – Batch Records

Steps:

1. Open desired form in edit view

Form Properties – Batch Records

Steps:

1. Open desired form in edit view

2. Open the Form Properties

3. Check the box next to the Allow Batch Record Creation option

4. Click Apply

5. Publish your changes

Form Properties – Record Copy

- Save Time

Form Properties – Record Copy

- Save Time

- Copies previous responses

Form Properties – Record Copy

- Save Time
- Copies previous responses
- Commonly used for pre/post assessments

Form Properties – Record Copy

Steps

1. Open desired form in edit view

Form Properties – Record Copy

Steps

1. Open desired form in edit view

2. Open the Form Properties

3. Check the box next to Allow Copies

4. Click Apply

5. Enable Clear On Copy property on necessary fields

6. Publish Form

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Form Properties – Record Copy

Data Entry Steps

1. Open desired record in edit view

2. Click Copy Record

Form Properties – Record Copy

Data Entry Steps

1. Open desired record in edit view

2. Click Copy Record

3. Click Go to copy

Form Properties – Record Copy

Data Entry Steps

1. Open desired record in edit view

2. Click Copy Record

3. Click Go to copy

4. Make desired changes

5. Click Save Record

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Email Triggers

Email Triggers

- Make workflow easier

Intake & Screening → Enrollment → Email Welcome Packet

Email Triggers

- Make workflow easier

- Sends automated email to specified individual(s)
  - Example: Email Welcome packet to new enrollees

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Email Triggers

Steps

1. Open desired form in the edit view

Email Triggers

Steps

1. Open desired form in the edit view

2. Add Email Trigger Element

3. Publish the Form*

Email Triggers

Steps

1. Open desired form in the edit view

2. Add Email Trigger Element

3. Publish the Form*

4. Configure Email Trigger Properties

5. Click Apply to save changes

6. Publish Form

Field Properties (email trigger)

Display Name
Enrollment Notification Email

Standard Properties
☐ Required   ☐ Duplicate Check   ☐ Locked
☐ Quick View   ☐ Searchable   ☑ Hidden
☐ Restricted   ☐ Clear On Copy

Special Properties

Tooltip

Main | Email Text | Filters | Attachments

Reply To :
info@helpinghands.org

Recipients :
"Client Email"<field_97@webaddress.com>,sgilbert@socialsolutions.com

Users
Add User To Recipients

Fields
Add Field To Recipients

Deactivate   Apply

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Report Ideas for Staff

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Report Ideals for Staff

- Make it easier to follow SOPs

- Vary by Organization

Clients by Gender

Nonbinary, 10.2%

Female, 42.9%

Male, 46.9%

	Percent of Total	Participant Profile Count
▸ Female	42.86%	21
▸ Male	46.94%	23
▸ Nonbinary	10.2%	5

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Report Ideals for Staff

Example

- Post Assessment Due Report

Report Ideals for Staff

Example

- Pending Inquiries Report

Pending Inquiries ▾   Bulletin with Report Example

Pending Inqueries
Report last run June 1st 2023, 6:38 pm
Click to refresh data

Search 🔍   Displaying 11 of 11 Rows   (Expand All Cells)

First	Last	Client Phone Number	Client Email	Client Status
Alvy	Singer	512.454.5454.	alvy.singer@gmail.com	pending
Ashton	Carter	...	ashton@mymail.com	pending
Chris	Batten	...	cb1109@mymail.com	Pending
Elizabeth	Aquino	212.982.2622.	lizrules@mymail.com	Pending
Evan	Anderson	917.181.1525.	evana@mymail.com	Pending
Felicia	Batten	212.928.2726.	battenf@mymail.com	Pending
Heather	Carter	410.918.1716.	heatherc@officemail.com	Pending
Jane	Doe	555.555.5555.	jdoe@fake.com	Pending
Jaquie	Thompson	512.777.4547.	jthompson@gmail.com	Pending
Trey	Singer	512.556.4544.	treysinger@gmail.com	Pending
Vicky	Grayson	512.454.5545.	vgrayson@gmail.com	Pending

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Training & Supporting Staff

- Report Building Webinar

- <u>Questions to Ask:</u>
  - What protocols need to be completed in the Software?
  - What reports will make it easier for staff to follow those protocols?
- Ask staff directly

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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!

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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

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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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