Apricot
Managing Your Sites & Programs Webinar

We will begin shortly

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Meet Your Trainer

Jaime Ransom

Training & Development Associate

Learning Objective

Share best practices for managing Sites and Programs so that Administrators can make informed decisions when managing and modifying the system.

Agenda

- Site and Program Structure
- Managing Sites
- Managing Programs

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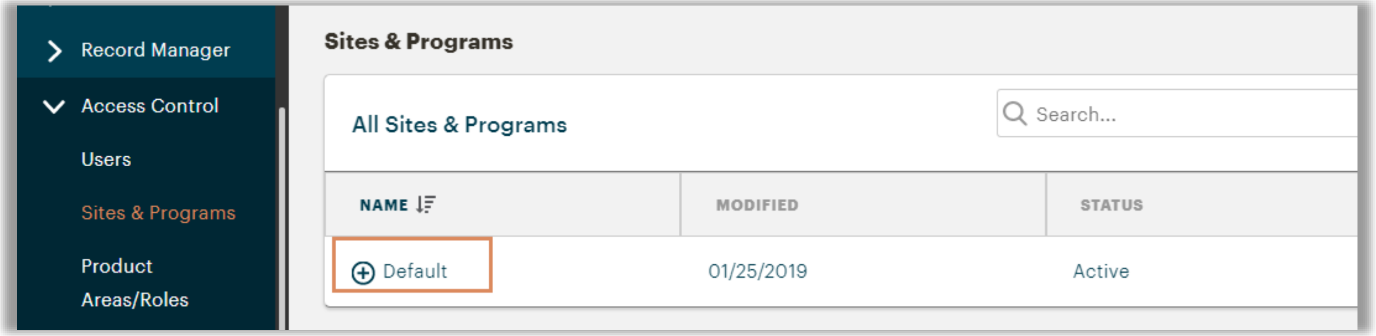
Site & Program Structure

Site & Program Structure

<u>Sites:</u>

- Separate one group of programs from another
- Commonly used when orgs. have multiple locations
- Easily separate metrics of one location from another in reports
- Software comes with 1 Default site
- Add more as needed
  - Best Practice: Establish naming convention for consistency



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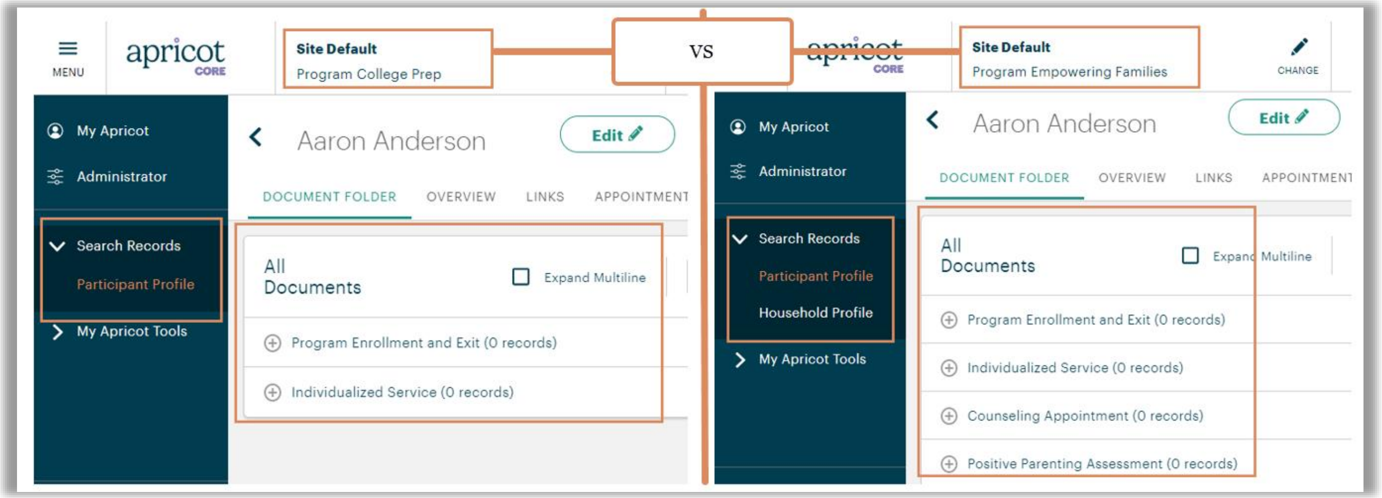
Site & Program Structure

Programs:

- Divide data by organizational programs
  - Forms
  - Clients
  - Reports



Site & Program Structure

Programs:

- Divide active clients from alumni
- Divide geographic locations within 1 state/region
- Distinguish different departments
- Distinguish program phases

Program Name (From Organization)	Brief Description	Corresponding Apricot Program
New Hope	Financial Literacy, Job Placement & Retention	New Hope Clients New Hope Alumni
Daily Bread	Food Pantry, Cooking Classes, Food Rescue	DB Brooklyn DB Queens
Teach a Man to Fish	ESL, GED, Vocational Classes, Tutoring, Job Search and Retention, Apricot.	Adult Education Workforce Development

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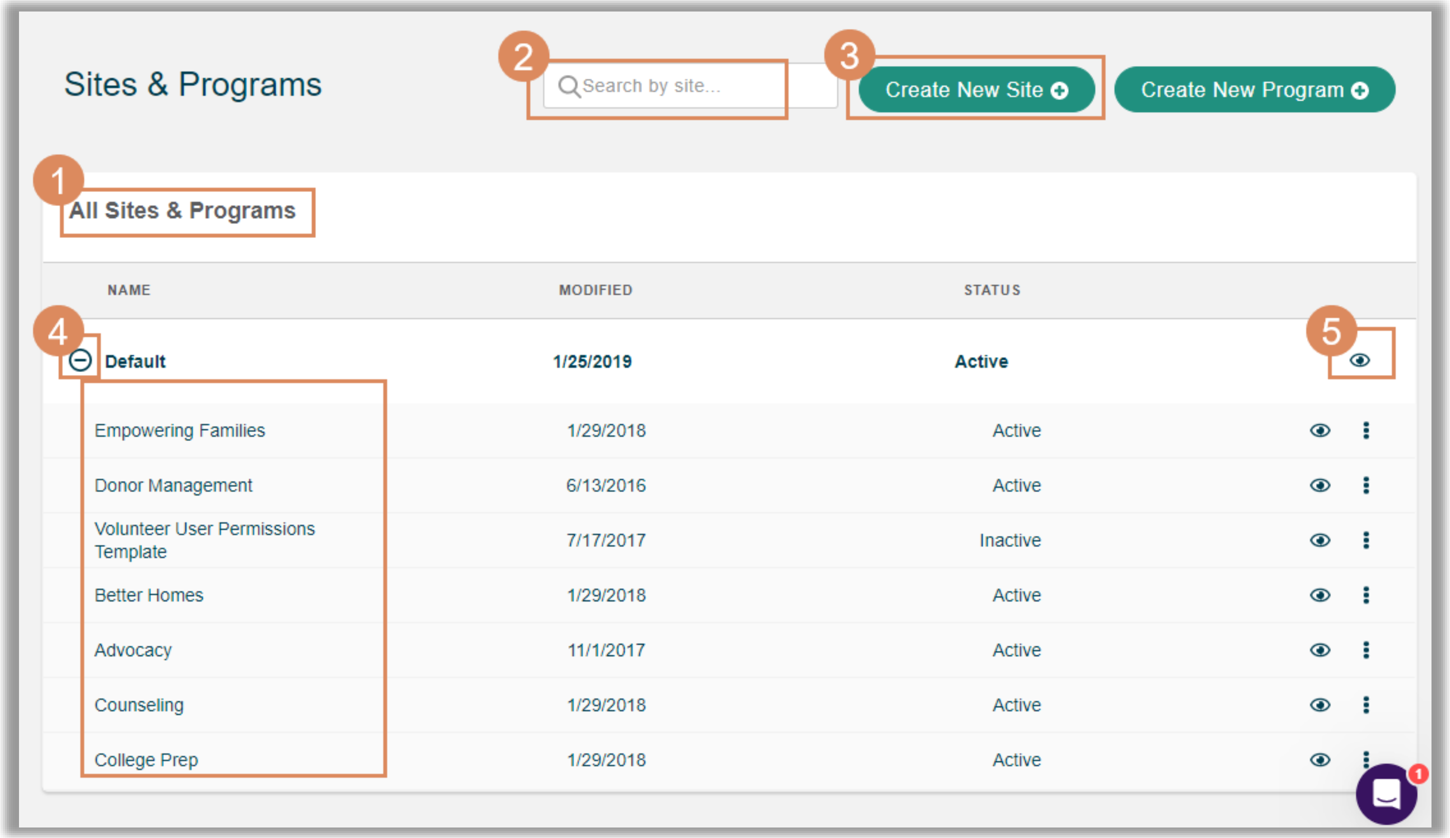
Managing Sites

Managing Sites

<u>Sites & Program Screen</u>

1. Sites show in alphabetical order
2. Search for Site or Program by name
3. Create New Site button to create new Site
4. Click toggle next to Site to view programs
5. Click eye icon to view or edit Site details



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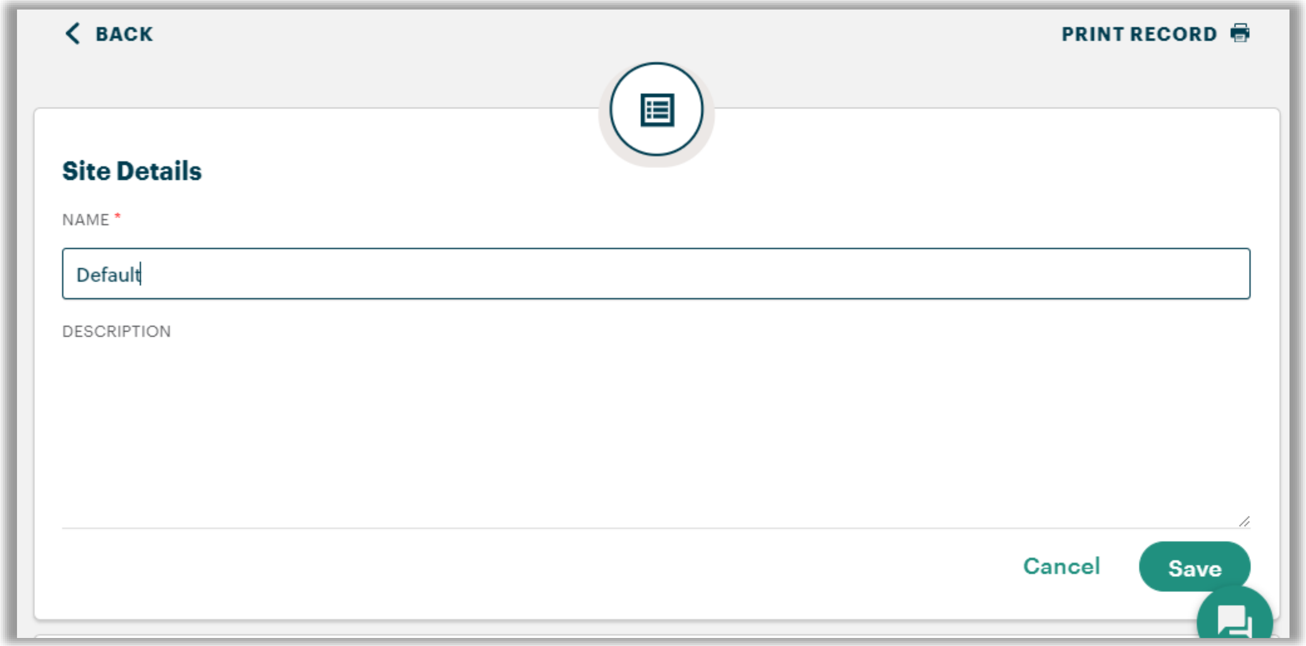
Managing Sites

Steps to Rename Your Default Site:

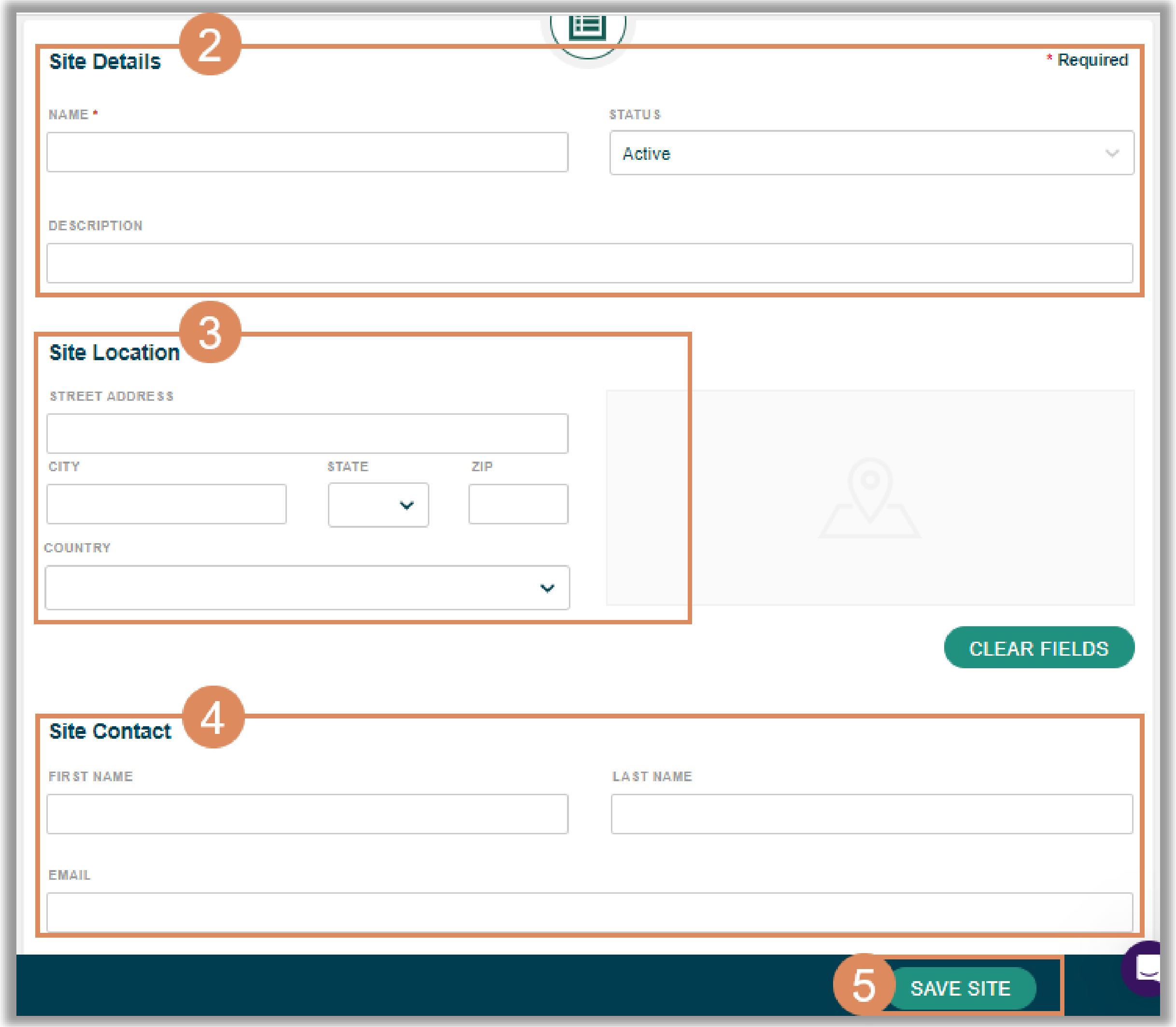
1. Click the eyeball icon to the right of the site
2. Click Update at the bottom right of the Site Details Section
3. Update the name and add desired details.
4. Click save to save your changes.



Managing Sites

Steps to Create a New Site:

1. Click the Create New Site button on the top right of the Sites & Programs page
2. Enter the appropriate information in the Site Details Section
3. Enter the Site Location.
4. Enter the Site Contact details
5. Click save to save your changes.



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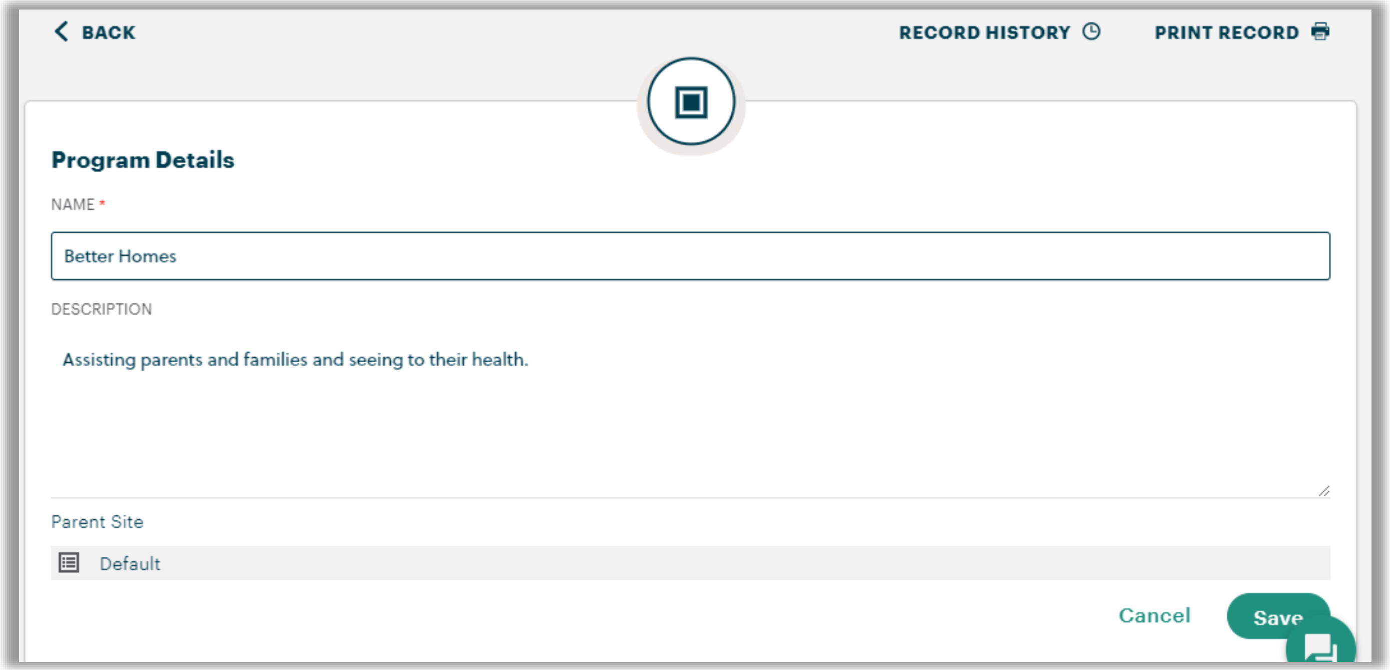
Managing Programs

Managing Programs

<u>Steps to Rename a Program</u>

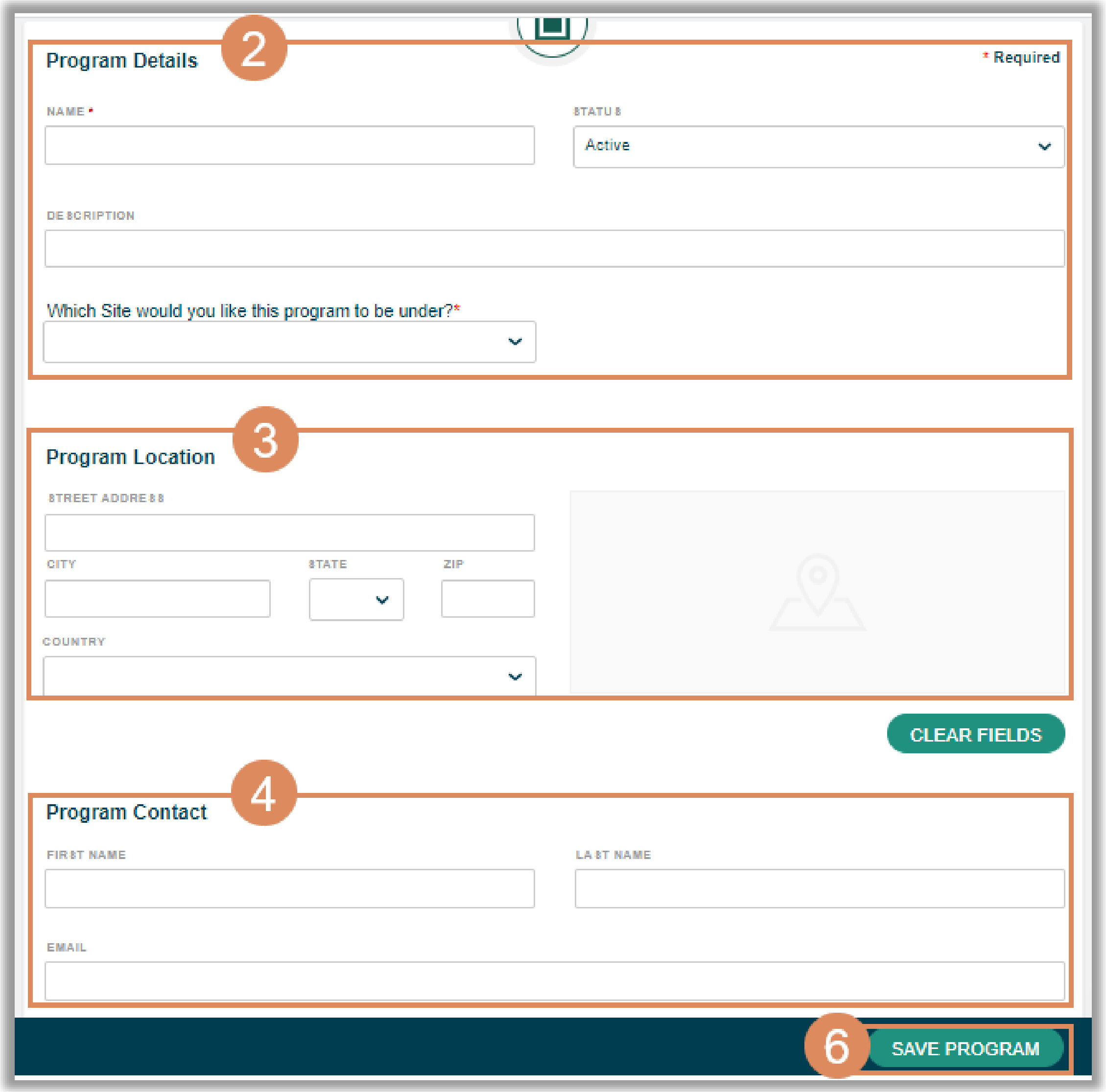
1. Click the eyeball icon next to the program
2. Click Update at the bottom of the Program Details section
3. Update the name and add desired details
4. Click Save



Managing Programs

<u>Steps to Create a New Program</u>

1. Click Create New Program
2. Add Program Details and Assign to appropriate Site
3. Enter Program Location
4. Enter Program Contact
5. Enable Referrals (if needed)
6. Click Save



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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!

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.

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