

# Apricot Modifying Forms

# Meet Your Trainer

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# Learning Objective

Review best practices making changes to existing Forms in Apricot so that Administrators can make informed decisions when updating the system design.

# Agenda

Adding New Fields

Removing Fields

Replacing Fields

Testing Your Design

# Adding New Fields

# Adding New Fields

- Can be done at any time
  - Must publish changes to use



# Adding New Fields

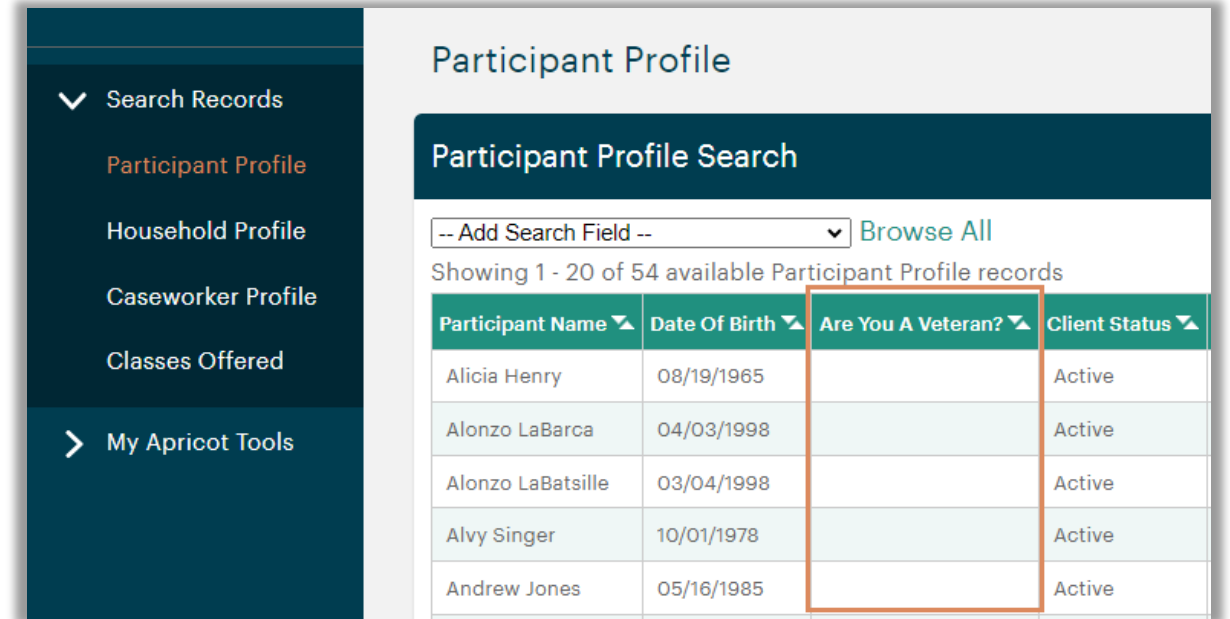
- Can be done at any time
  - Must publish changes to use
- Fields will be unanswred for existing records

The screenshot shows a web interface for searching participant profiles. On the left is a dark teal sidebar with navigation options: Search Records (expanded), Participant Profile (highlighted in orange), Household Profile, Caseworker Profile, Classes Offered, and My Apricot Tools. The main content area is titled 'Participant Profile' and contains a 'Participant Profile Search' section. This section has a search dropdown menu currently set to '-- Add Search Field --' and a 'Browse All' link. Below the search area, it states 'Showing 1 - 20 of 54 available Participant Profile records'. A table displays the search results with the following data:

| Participant Name  | Date Of Birth | Are You A Veteran? | Client Status |
|-------------------|---------------|--------------------|---------------|
| Alicia Henry      | 08/19/1965    |                    | Active        |
| Alonzo LaBarca    | 04/03/1998    |                    | Active        |
| Alonzo LaBatsille | 03/04/1998    |                    | Active        |
| Alvy Singer       | 10/01/1978    |                    | Active        |
| Andrew Jones      | 05/16/1985    |                    | Active        |

# Adding New Fields

- Can be done at any time
  - Must publish changes to use
- Fields will be unanswered for existing records
  - Update manually
  - Use Import Tool
  - Report on the field from publish date forward



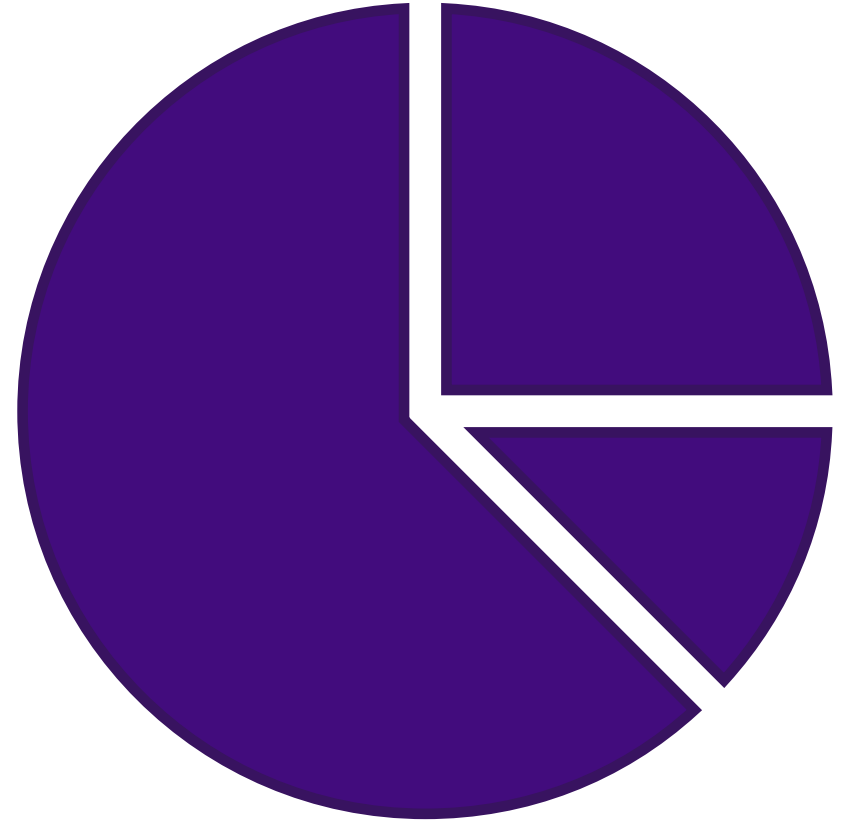
The screenshot displays the 'Participant Profile' search interface. On the left is a dark teal sidebar with navigation options: 'Search Records' (expanded), 'Participant Profile' (highlighted in orange), 'Household Profile', 'Caseworker Profile', 'Classes Offered', and 'My Apricot Tools'. The main content area is titled 'Participant Profile Search' and features a search dropdown menu currently set to '-- Add Search Field --' and a 'Browse All' link. Below the search area, it indicates 'Showing 1 - 20 of 54 available Participant Profile records'. A table with four columns is shown: 'Participant Name', 'Date Of Birth', 'Are You A Veteran?', and 'Client Status'. The 'Are You A Veteran?' column is highlighted with an orange border. The table contains five rows of data.

| Participant Name  | Date Of Birth | Are You A Veteran? | Client Status |
|-------------------|---------------|--------------------|---------------|
| Alicia Henry      | 08/19/1965    |                    | Active        |
| Alonzo LaBarca    | 04/03/1998    |                    | Active        |
| Alonzo LaBatsille | 03/04/1998    |                    | Active        |
| Alvy Singer       | 10/01/1978    |                    | Active        |
| Andrew Jones      | 05/16/1985    |                    | Active        |



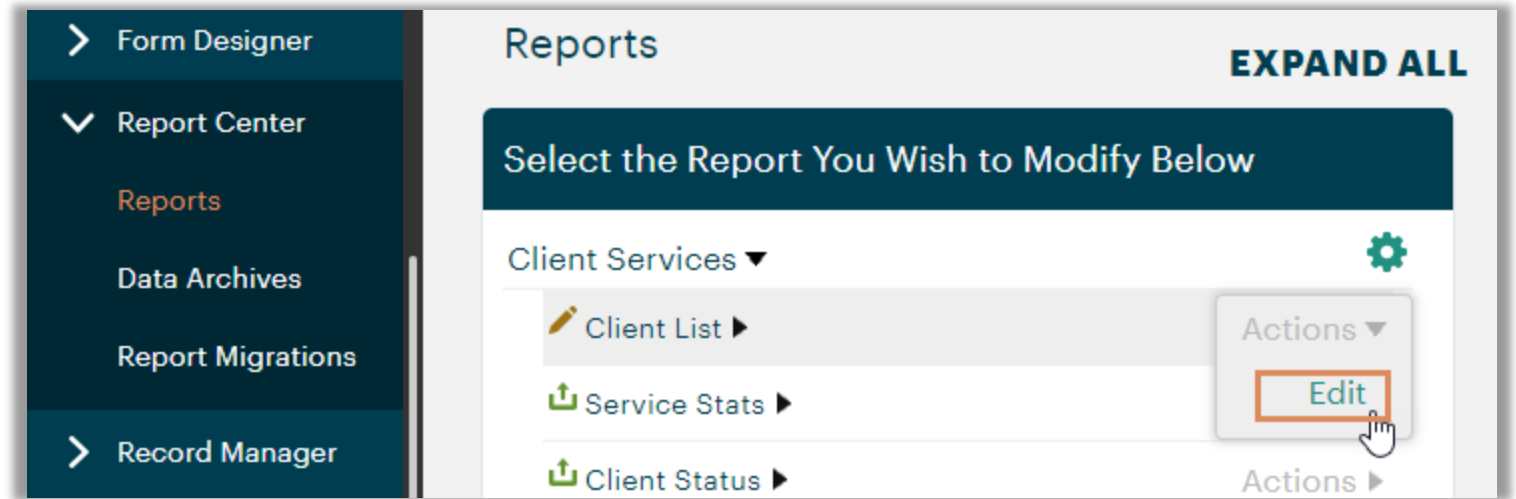
# Adding New Fields

- Does NOT impact existing reports



# Adding New Fields

- Does NOT impact existing reports
- Edit report to include new field



The screenshot displays the Bonterra Reports interface. On the left is a dark teal sidebar with navigation options: Form Designer, Report Center (expanded), Reports (highlighted in orange), Data Archives, Report Migrations, and Record Manager. The main content area is titled 'Reports' and features an 'EXPAND ALL' button in the top right. Below the title is a dark teal header with the text 'Select the Report You Wish to Modify Below'. The main area lists reports under the 'Client Services' category, which has a gear icon for settings. The reports listed are 'Client List', 'Service Stats', and 'Client Status'. An 'Actions' dropdown menu is open over the 'Client List' report, showing an 'Edit' button highlighted with an orange border and a mouse cursor pointing to it. Another 'Actions' dropdown is visible at the bottom right of the list.

# Adding New Fields

- Does NOT impact existing reports
- Edit report to include new field
- Existing records will have blank values

The screenshot shows a data management interface with a dark teal header bar containing 'New Section' and a gear icon. Below the header, there are sections for 'Forms' (containing 'Participant Profile (Always)'), 'Filters', and 'Limit Sections'. A central message reads 'Click to refresh data' and 'Results limited to the first 10 Rows.' Below this is a table with 8 columns: 'First', 'Last', 'Date of Birth', 'Intake Date', 'Client Status', 'Gender', 'Ethnicity', and 'Are you a Veteran?'. Each column header has a gear icon. The 'Are you a Veteran?' column is highlighted with an orange border and contains blank rows. The table data is as follows:

| First  | Last        | Date of Birth | Intake Date | Client Status | Gender | Ethnicity    | Are you a Veteran? |
|--------|-------------|---------------|-------------|---------------|--------|--------------|--------------------|
| Alicia | Henry       | 08/19/1965    | 04/04/2017  | Active        | Female | Non-Hispanic |                    |
| Alonzo | LaBatsille  | 03/04/1998    | 09/09/2016  | Active        | Male   | Hispanic     |                    |
| Alonzo | LaBarca     | 04/03/1998    | 02/10/2010  | Active        | Male   | Non-Hispanic |                    |
| Alvy   | Singer      | 10/01/1978    | 05/14/2016  | Active        | Male   | Hispanic     |                    |
| Andrew | Jones       | 05/16/1985    | 09/01/2016  | Active        | Male   | Non-Hispanic |                    |
| April  | Billingslea | 04/15/1982    | 05/24/2013  | Active        | Female | Hispanic     |                    |
| Asher  | Billingslea | 06/09/1984    | 06/01/2013  | Active        | Male   | Non-Hispanic |                    |

# Adding New Fields

## Steps

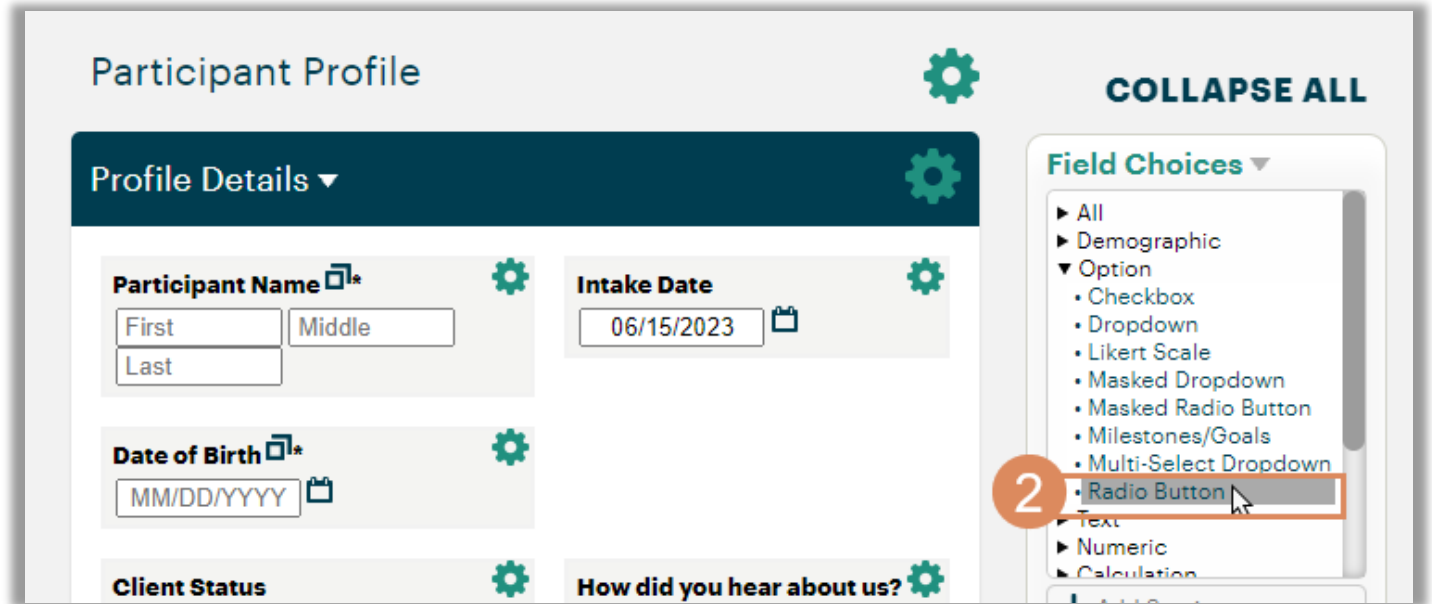
- Open the Form in the Edit View

The screenshot displays the Bonterra Form Designer interface for editing a 'Participant Profile' form. On the left is a dark sidebar with a menu containing: Form Designer (expanded), Standard Forms, Templates, Queries, Lookup Lists, Smart Field Presets, Users Form, Programs Form, Edit Templates, and Report Center. The main workspace shows the form layout with sections: 'Profile Details' (expanded), 'Participant Name' (with sub-fields for First, Middle, and Last), 'Intake Date' (with value 06/15/2023), 'Date of Birth' (with MM/DD/YYYY format), 'Client Status' (with radio buttons for Active, Inactive, and Other), and 'How did you hear about us?' (with checkboxes for Internet, Newspaper, and Radio). On the right, there is a 'COLLAPSE ALL' button and a 'Field Choices' panel with a scrollable list of field types: All, Demographic, Option, Text, Numeric, Calculation, Date and Time, Upload, Hyperlink, Linking, Special, and Smart Fields. Below the list are buttons for '+ Add Section' and 'Registration'.

# Adding New Fields

## Steps

- Open the Form in the Edit View
- Choose the appropriate Field Choice



The screenshot displays the 'Participant Profile' edit interface. On the right side, a 'Field Choices' dropdown menu is open, listing various field types. The 'Radio Button' option is highlighted with an orange box and a red circle containing the number '2', indicating the current step in the process. The main form area shows several fields: 'Participant Name' (with sub-fields for First, Middle, and Last), 'Intake Date' (with a date picker showing 06/15/2023), 'Date of Birth' (with a date picker showing MM/DD/YYYY), 'Client Status', and 'How did you hear about us?'. Each field has a gear icon for configuration.

# Adding New Fields

## Steps

- Open the Form in the Edit View
- Choose the appropriate Field Choice
- Manage the Field Properties
- Click Apply

**Participant Profile**

**Field Properties (radio button)**

Display Name  
Are you a Veteran?

Standard Properties

|                                     |  |
|-------------------------------------|--|
| <input type="checkbox"/> Required   | <input type="checkbox"/> Duplicate Check |
| <input type="checkbox"/> Quick View | <input type="checkbox"/> Searchable      |
| <input type="checkbox"/> Restricted | <input type="checkbox"/> Clear On Copy   |

Field Choices +

Yes

No

**Bulk Entry**

Allow Other

Special Properties

Secure Field (role permissions required to view information)

Default Value

Tooltip

Delete Apply

Click to manage Field Properties

3

4

# Adding New Fields

## Steps

- Open the Form in the Edit View
- Choose the appropriate Field Choice
- Manage the Field Properties
- Click Apply
- Publish Changes

The screenshot displays the 'Participant Profile' form in edit view. The form is organized into several sections, each with a gear icon for configuration:

- Profile Details** (dropdown menu)
- Participant Name**: Three input fields for First, Middle, and Last names.
- Intake Date**: A date input field showing 06/15/2023.
- Date of Birth**: A date input field with a calendar icon.
- Are you a Veteran?**: Radio buttons for Yes and No.
- Client Status**: Radio buttons for Active, Inactive, and Other.
- How did you hear about us?**: Checkboxes for Internet, Newspaper, Radio, and Other.
- Client Phone Number**: Input fields for area code, number, and extension.
- Client Email**: An email input field showing customer\_care@apricot.info.

On the right side, there is a sidebar with the following options:

- COLLAPSE ALL**
- Field Choices** (dropdown)
- Requirements** (dropdown) with a status 'All checks passed' and a green checkmark.
- Form Actions** (dropdown) containing:
  - Save Form
  - Publish Form** (highlighted with an orange box and a red circle with the number 5)
  - Templatize
  - Previous Version
  - Deactivate Form
  - Form Permissions
  - Return to Form List
  - Show/Hide Inactive Fields

# Removing Fields



# Removing Fields

## 3 options:

- Lock
- Hide
- Deactivate

The screenshot shows a dialog box titled "Field Properties (dropdown)" with a close button in the top right corner. The dialog is divided into several sections:

- Display Name:** A text input field containing "Ethnicity".
- Standard Properties:** A grid of checkboxes including:
  - Required
  - Duplicate Check
  - Quick View
  - Searchable
  - Restricted
  - Clear On Copy
  - Locked (circled with a '1')
  - Hidden (circled with a '2')
- Field Choices:** A section with a plus sign icon, containing two text input fields: "Hispanic" and "Non-Hispanic". Below them is a green "Bulk Entry" button and an "Allow Other" checkbox.
- Special Properties:** A section with a checkbox for "Secure Field (role permissions required to view information)".
- Default Value:** A text input field.
- Tooltip:** A text input field.
- Buttons:** At the bottom, there are two green buttons: "Deactivate" (circled with a '3') and "Apply".

# Removing Fields


## When to use each option:

- Lock shows on data entry & reports

Participant Profile

Profile Details ▶

Demographic Information ▼

**Ethnicity**   
Non-Hispanic ▼

**Marital Status**  
--Please Select-- ▼

**Employed**

Client List

New Section ▼

Forms

Report last run June 15th 2023, 4:30 pm  
Click to refresh data

Search  Displaying 54 of 54 rows (Expand All Cells)

| First  | Last        | Date of Birth | Intake Date | Client Status | Gender | Ethnicity    | Are you a Veteran? |
|--------|-------------|---------------|-------------|---------------|--------|--------------|--------------------|
| Alicia | Henry       | 08/19/1965    | 04/04/2017  | Active        | Female | Non-Hispanic |                    |
| Alonzo | LaBatsille  | 03/04/1998    | 09/09/2016  | Active        | Male   | Hispanic     |                    |
| Alonzo | LaBarca     | 04/03/1998    | 02/10/2010  | Active        | Male   | Non-Hispanic |                    |
| Alvy   | Singer      | 10/01/1978    | 05/14/2016  | Active        | Male   | Hispanic     |                    |
| Andrew | Jones       | 05/16/1985    | 09/01/2016  | Active        | Male   | Non-Hispanic |                    |
| April  | Billingslea | 04/15/1982    | 05/24/2013  | Active        | Female | Non-Hispanic |                    |
| Asher  | Billingslea | 06/09/1984    | 06/01/2013  | Active        | Male   | Non-Hispanic |                    |

# Removing Fields

## When to use each option:

- Lock shows on data entry & reports
- Hide shows on reports only

Participant Profile

Profile Details ▶

Demographic Information ▼

Marital Status  
--Please Select--

Employed

Client List

New Section ▼

Forms

Filters

Limit Sections

Report last run June 15th 2023, 4:30 pm  
Click to refresh data

Display 54 of 54 Rows (Expand All Cells)

| First  | Last        | Date of Birth | Intake Date | Client Status | Gender | Ethnicity    | Are you a Veteran? |
|--------|-------------|---------------|-------------|---------------|--------|--------------|--------------------|
| Alicia | Henry       | 08/19/1965    | 04/04/2017  | Active        | Female | Non-Hispanic |                    |
| Alonzo | LaBatsille  | 03/04/1998    | 09/09/2016  | Active        | Male   | Hispanic     |                    |
| Alonzo | LaBarca     | 04/03/1998    | 02/10/2010  | Active        | Male   | Non-Hispanic |                    |
| Alvy   | Singer      | 10/01/1978    | 05/14/2016  | Active        | Male   | Hispanic     |                    |
| Andrew | Jones       | 05/16/1985    | 09/01/2016  | Active        | Male   | Non-Hispanic |                    |
| April  | Billingslea | 04/15/1982    | 05/24/2013  | Active        | Female | Non-Hispanic |                    |
| Asher  | Billingslea | 06/09/1984    | 06/01/2013  | Active        | Male   | Non-Hispanic |                    |

Hidden Fields no longer show on the data entry screen both when editing existing records and when creating new records BUT the data shows in reports

# Removing Fields

## When to use each option:

- Lock shows on data entry & reports
- Hide shows on reports only
- Deactivate **not** visible on data entry nor reports
  - Remove field from reports **first**

The screenshot displays two overlapping panels. The top panel, titled 'Participant Profile', has a 'COLLAPSE' button and contains sections for 'Profile Details' and 'Demographic Information'. A red box highlights a field in the 'Demographic Information' section, with an arrow pointing to an orange callout box that reads: 'Deactivated doesn't show on data entry nor on reports.' The bottom panel, titled 'Client List', also has a 'COLLAPSE' button and contains a 'New Section' dropdown. A red box highlights an error message: 'The field 'Ethnicity' referred to by the column 'Ethnicity' is no longer active. Click here to report this error.' An arrow points from the orange callout box to this error message.

# Replacing Fields

# Replacing Fields


- Change formatting of field

## Services COLLAPSE ALL

April Billingslea  
Quick View Information ▶

### Service Information ▼

This form should be completed when a client receives any individualized service.

|   |  |
|---|--|
| <b>*Service Date</b><br><input type="text" value="MM/DD/YYYY"/>  | <b>Contact Method</b><br><input type="text"/>                              |
| <b>*Service Type</b><br><input type="text" value="--Please Select--"/> ▼  | <b>*Funding Source</b><br><input type="text" value="--Please Select--"/> ▼ |
| <b>*Service Time in Hours</b><br><input type="text" value="0.0"/>   |  |

# Replacing Fields

- Change formatting of field
- Replace with more optimal Fields

Incoming Referral

Main Contact Info

All information is confidential and will not be shared without your written consent.

**Client Name** \*

First Middle Last

**Cell Phone**

ext.

**Email**

customer\_care@apricot.inf

**Referring Organization Name**

--Please Select--

**Intake Date \***

06/16/2023

**Date of Birth \***

MM/DD/YYYY

**Work Phone**

ext.

**How did you hear about us?**

Internet

Newspaper

Outreach Event

Referral Partner

Other

**Status**

Pending

Enrolled

# Replacing Fields

- New field will NOT have data associated with it

Participant Profile

Participant Profile Search

-- Add Search Field -- [Browse All](#)

**Contact Method (Services)** [Clear Field](#) ✕

--Please Select--

Showing 1 - 20 of 51 matching Participant Profile records More Columns...

|   | ... | Participant Name | Date Of Birth | Client Status | Client Email           | Gender | Employed |
|---|-----|------------------|---------------|---------------|------------------------|--------|----------|
| ▶ | 1   | Adam Voght       | 09/21/1987    |               | adamv@officemail.com   | Female | No       |
| ▼ | 4   | Alicia Henry     | 08/19/1965    | Active        | henry.alicia@gmail.com | Female | Yes      |

**Displaying 4 Services records.** More Columns...

| Contact Method | Service Date | Service Type     | Funding Source | Service Time in Hours | Service Notes   |
|----------------|--------------|------------------|----------------|-----------------------|---|
|                | 04/30/2023   | Resource Session | SSG            | 1.00                  | provided information on local family health care facilities   |
|                | 05/05/2023   | Family Coaching  | SSG            | 2.50                  | First family coaching session. Family seeking support to help get o the same page with parenting styles, to reduce sibling fighting and improve family communication. |
|                | 05/10/2023   | Family Coaching  | SSG            | 2.50                  | Introduced family to gentle parenting approach. Explained basic principles of setting boundaries and offered tools to help de-escalate sibling fights that occur.     |



# Replacing Fields

- New field will NOT have data associated with it
- **2 Options:**
- Report on Old field to see records created prior date change is made.

Archived Contact Method Report COLLAPSE ALL

Archived Contact Location Method Data ▼

▼ Forms

Participant Profile  
Services


► Filters +

▼ Limit Sections

Report last run June 16th 2023, 3:52 pm  
[Click to refresh data](#)

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

| First ▼ | Last ▼       | Service Date ▼ | Contact Method ▼ |
|---------|--------------|----------------|------------------|
| Adam    | Voght        | 03/07/2023     | Phone Call       |
| Alicia  | Henry        | 03/07/2023     | Phone Call       |
| Alonzo  | LaBarca      | 03/07/2023     | Phone Call       |
| Alvy    | Singer       | 03/07/2023     | Phone Call       |
| Cherise | Alexander    | 03/07/2023     | Phone Call       |
| Heather | Carter       | 03/29/2023     | Email            |
| Heather | Lightfoot    | 03/29/2023     | Email            |
| Illiana | Pallmissiano | 03/29/2023     | Email            |
| Jacob   | Smithers     | 03/29/2023     | Email            |



# Replacing Fields

- New field will NOT have data associated with it
- **2 Options:**
- Report on Old field to see records created prior date change is made.

OR

- Run a Report to export existing data to Excel.
  - Use Import Tool to upload existing data into new field.

6th 20  
resh data

Displaying 11 of 11 Rows (Expand All Cells)

| First   | Last      | Date of Birth | Client Record ID | Service Date | Contact Method | Service Record ID |
|---------|-----------|---------------|------------------|--------------|----------------|-------------------|
| Adam    | Voght     | 09/21/1987    | 816              | 03/07/2023   | Phone Call     | 869               |
| Alicia  | Henry     | 08/19/1965    | 688              | 03/07/2023   | Phone Call     | 870               |
| Alonzo  | LaBarca   | 04/03/1998    | 790              | 03/07/2023   | Phone Call     | 871               |
| Alvy    | Singer    | 10/01/1978    | 239              | 03/07/2023   | Phone Call     | 872               |
| Cherise | Alexander | 02/28/1969    | 461              | 03/07/2023   | Phone Call     | 873               |
| Heather | Carter    | 04/18/2003    | 624              | 03/29/2023   | Email          | 874               |
| Heather | Lightfoot | 03/06/1999    | 687              | 03/29/2023   | Email          | 875               |

**COLLAPSE ALL**

**Report Actions**

- Edit
- Refresh All Sections
- Print Mode
- Export**
- Full Screen
- Reset Filters
- Return to List

# Replacing Fields

## Steps to Replace Fields:

1. Export current Data (optional)\*

Contact Location Method Data

**COLLAPSE ALL**

Report Actions ▾

- Edit
- Refresh All Sections
- Print Mode
- Export**
- Full Screen
- Reset Filters
- Return to List

Contact Location Method Data ▾

- Forms
- Filters

Note the inclusion of duplicate check fields & the Record ID, they are needed for successful import.

Data from old field

6th 20  
resh data


Search  Displaying 11 of 11 Rows (Expand All Cells)


| First ▾ | Last ▾    | Date of Birth ▾ | Client Record ID ▾ | Service Date ▾ | Contact Method ▾ | Service Record ID ▾ |
|---------|-----------|-----------------|--------------------|----------------|------------------|---------------------|
| Adam    | Voght     | 09/21/1987      | 816                | 03/07/2023     | Phone Call       | 869                 |
| Alicia  | Henry     | 08/19/1965      | 688                | 03/07/2023     | Phone Call       | 870                 |
| Alonzo  | LaBarca   | 04/03/1998      | 790                | 03/07/2023     | Phone Call       | 871                 |
| Alvy    | Singer    | 10/01/1978      | 239                | 03/07/2023     | Phone Call       | 872                 |
| Cherise | Alexander | 02/28/1969      | 461                | 03/07/2023     | Phone Call       | 873                 |
| Heather | Carter    | 04/18/2003      | 624                | 03/29/2023     | Email            | 874                 |
| Heather | Lightfoot | 03/06/1999      | 687                | 03/29/2023     | Email            | 875                 |


# Replacing Fields




## Steps to Replace Fields:

1. Export current Data (optional)\*
2. Rename the field you plan to remove.

Services COLLAPSE ALL 

**Service Information** 

This form should be completed when a client receives any individualized service. 

|  |   |
|--|---|
| <b>Service Date *</b><br><input type="text" value="MM/DD/YYYY"/>  | <b>Contact Method archive</b> <br><input type="text"/>                     |
| <b>Service Type *</b><br><input type="text" value="--Please Select--"/>  | <b>Funding Source *</b> <br><input type="text" value="--Please Select--"/> |
| <b>Service Time in Hours *</b><br><input type="text" value="0.0"/>   |   |

# Replacing Fields

## Steps to Replace Fields:

1. Export current Data (optional)\*
2. Rename the field you plan to remove.
3. Remove the old field (Lock, Hide, or Deactivate)

Services COLLAPSE ALL

### Service Information

This form should be used to create a service that receives any individual information.

**Service Date \***  
MM/DD/YYYY

**Service Type \***  
--Please Select--

**Service Time in Hours \***  
0.0

#### Field Properties (text)

Display Name  
Contact Method archive

Standard Properties

|                                     |  |  |
|-------------------------------------|--|--|
| <input type="checkbox"/> Required   | <input type="checkbox"/> Duplicate Check | <input type="checkbox"/> Locked            |
| <input type="checkbox"/> Quick View | <input type="checkbox"/> Searchable      | <input checked="" type="checkbox"/> Hidden |
| <input type="checkbox"/> Restricted | <input type="checkbox"/> Clear On Copy   |  |

Special Properties

|                      |                      |
|----------------------|----------------------|
| Field Width          | Default Value        |
| <input type="text"/> | <input type="text"/> |
| Character Limit      | Hint                 |
| <input type="text"/> | <input type="text"/> |

Tooltip

# Replacing Fields

## Steps to Replace Fields:

1. Export current Data (optional)\*
2. Rename the field you plan to remove.
3. Remove the old field (Lock, Hide, or Deactivate)
4. Add new field

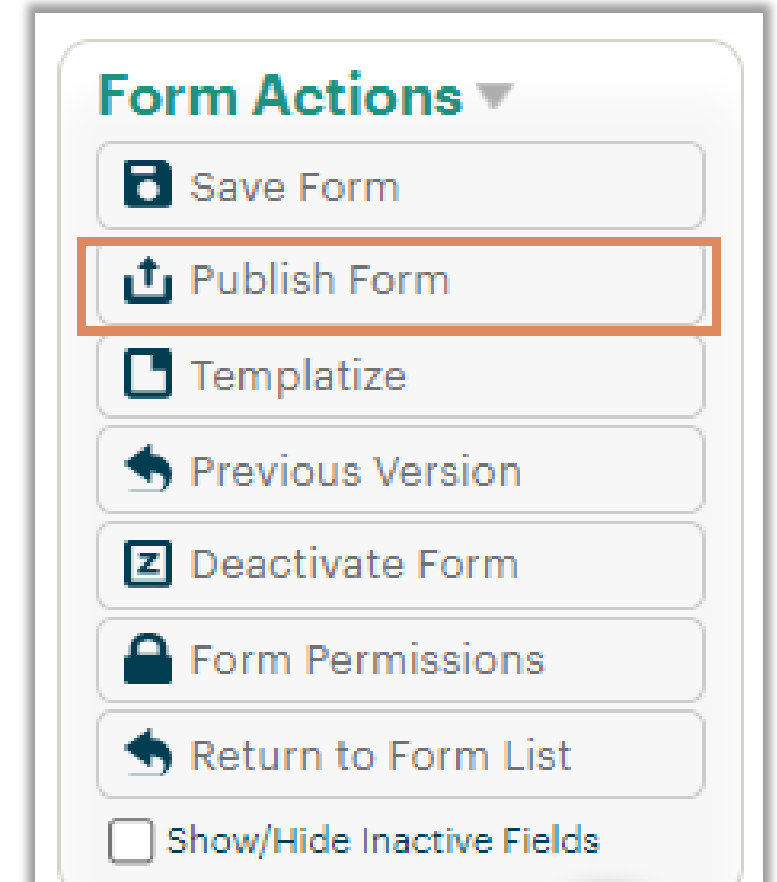
The screenshot displays the 'Services' configuration page. At the top right, there is a 'COLLAPSE ALL' button with a gear icon. Below this is a 'Service Information' header with a dropdown arrow and a gear icon. The main area contains several fields, each with a gear icon for configuration:

- A text box with the instruction: "This form should be completed when a client receives any individualized service."
- Service Date \***: A date input field with a calendar icon and a gear icon.
- Service Type \***: A dropdown menu with "--Please Select--" and a gear icon.
- Service Time in Hours \***: A numeric input field with "0.0" and a gear icon.
- Contact Method**: A dropdown menu with "--Please Select--" and a gear icon. This field is highlighted with an orange border.
- Funding Source \***: A dropdown menu with "--Please Select--" and a gear icon.
- Contact Method archive**: An empty text input field with a gear icon.

# Replacing Fields

## Steps to Replace Fields:

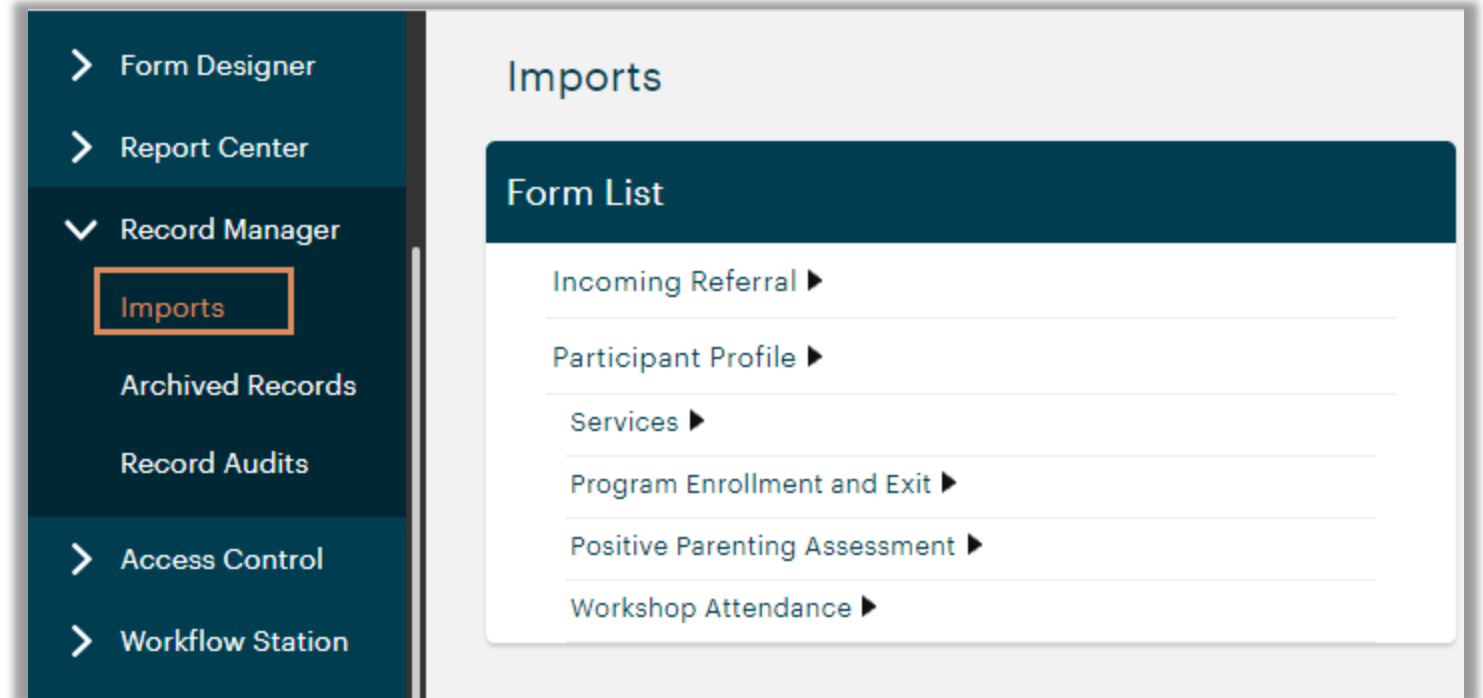
1. Export current Data (optional)\*
2. Rename the field you plan to remove.
3. Remove the old field (Lock, Hide, or Deactivate)
4. Add new field
5. Publish Form



# Replacing Fields

## Steps to Replace Fields:

1. Export current Data (optional)\*
2. Rename the field you plan to remove.
3. Remove the old field (Lock, Hide, or Deactivate)
4. Add new field
5. Publish Form
6. Import original records into new field (optional)\*





# Testing Your Design

# Testing Your Design

Open Data Entry Tab

Create a Fake Record

The screenshot shows a web application interface for 'Participant Profile'. On the left is a dark sidebar with a list of menu items: 'Search Records', 'Participant Profile' (highlighted with a red circle and the number '1'), 'Household Profile', 'Caseworker Profile', and 'Classes Offered'. The main content area is titled 'Participant Profile' and contains a 'Participant Profile Search' section. This section has a search bar with a dropdown menu set to '-- Add Search Field --' and a 'Browse All' button. Below the search bar, it says 'Showing 1 - 20 of 54 available Participant Profile records' and a 'More Columns...' link. A table with the following columns is visible: 'Participant Name', 'Date Of Birth', 'Client Status', 'Client Email', 'Gender', and 'Emp'. The first row of data shows 'Alicia Henry', '08/19/1965', 'Active', an empty cell, 'Female', and 'Yes'. On the right side of the interface, there is an 'EXPAND ALL' button and a 'Search Actions' dropdown menu. The 'Search Actions' menu is open, showing several options: 'New Participant Profile' (highlighted with a red circle and the number '2'), 'Clear Search History', 'Program Access', 'Merge Folders', 'Create Referral', and 'Show Enrollment Actions'.

# 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](mailto: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.