Apricot
Supporting New Users: A Best Practice Guide

Bonterra™

Meet Your Trainer

First Name Last Name

Training & Development Associate

Bonterra™

Learning Objective

Introduce Administrators to the best features in the software that can help you support your team in building good data entry habits in Apricot.

Bonterra
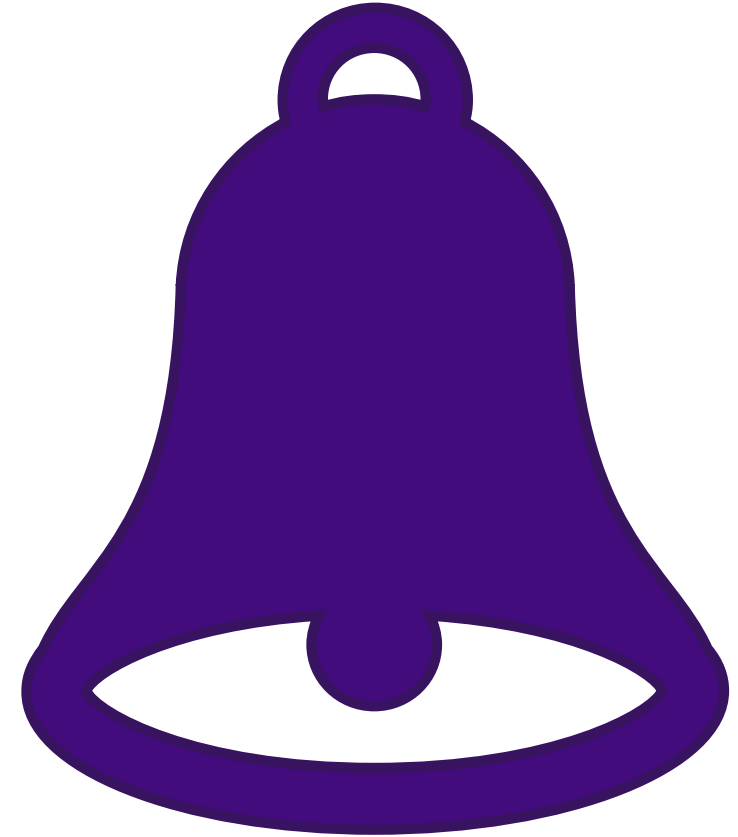
Agenda

Supporting Good Log In Habits via Record Audits

Trouble Shooting "Missing" Data via Record Audits

Data Clean Up via Archive Records

Bonterra™

Supporting Good Login Habits

Supporting Good Login Habits

- Helpful during initial Go Live

- Email Reminders

- Team Meetings

Bonterra™

Supporting Good Login Habits

- Record Audits Tool

Supporting Good Login Habits

- Record Audits Tool
- Unlisted users **have not** logged in

User Name	Form Name	Tier 1 Record Name	Record ID	Action	Time
Sabrina Gilbert (SSG)	Users			User logged in	04/07/2023 2:03 PM CDT
Kyle Della Rocca (SSG)	Users			User logged in	02/15/2023 11:32 AM CST
Taylor Roderick (SSG)	Users			User logged in	02/15/2023 10:13 AM CST
Sabrina Gilbert (SSG)	Users			User logged in	02/10/2023 1:24 PM CST
Kyle Della Rocca (SSG)	Users			User logged in	01/25/2023 10:55 AM CST
Zoe Rivkind (SSG)	Users			User logged in	05/26/2022 3:29 PM CDT
Mary Broome (SSG)	Users			User logged in	03/02/2022 5:10 PM CST
Asnake Hailegiorghis (SSG)	Users			User logged in	11/24/2021 11:24 AM CST
Taylor Roderick (SSG)	Users			User logged in	07/15/2021 12:53 PM CDT

Results

Export Results

Bonterra ™

9

Trouble Shooting "Missing" Data

Trouble Shooting "Missing" Data via Record Audits
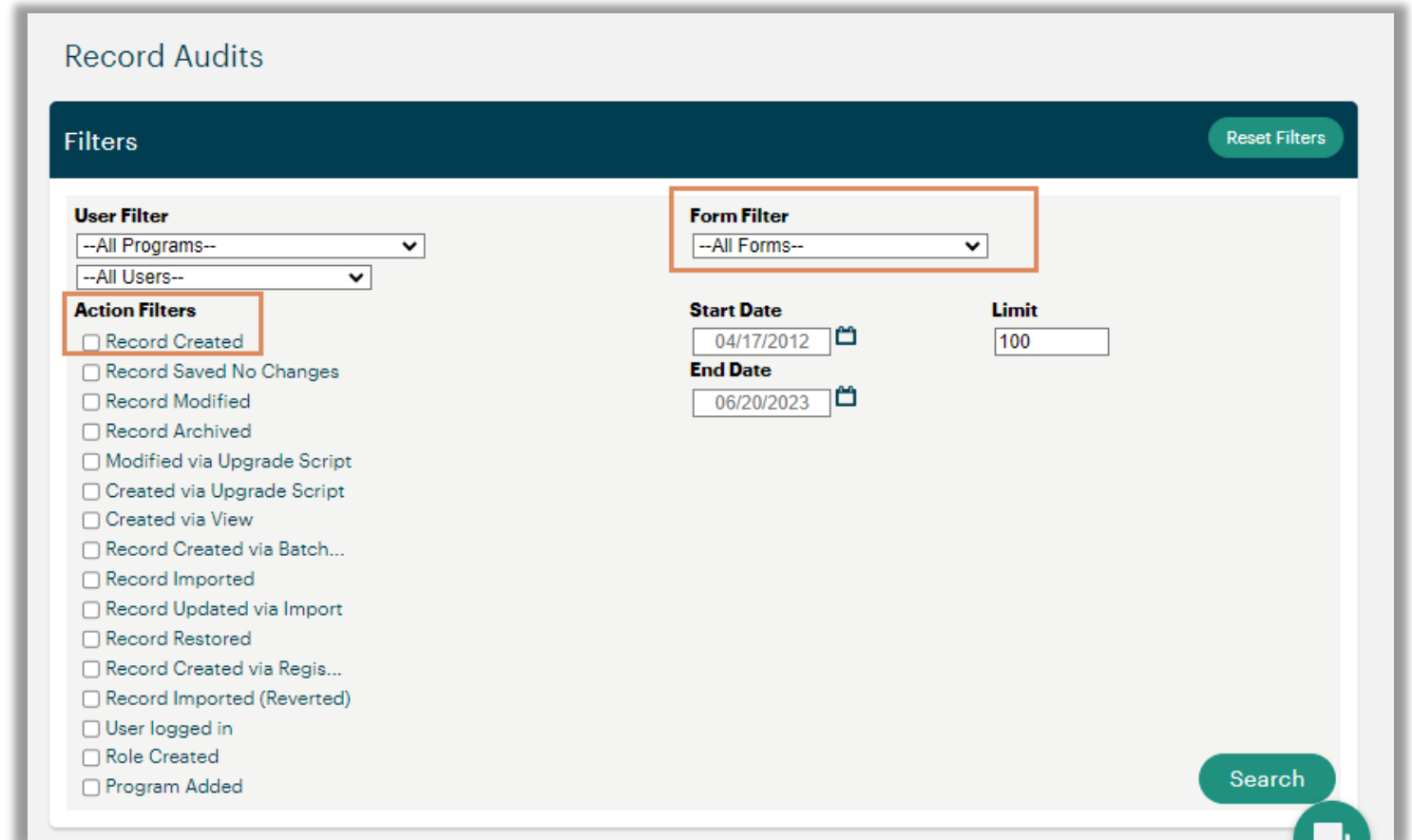
Questions to Ask:

- Did the data save?

- Has the data been changed?

- Has the record been archived?

- What program is the record assigned to?

Bonterra™

Trouble Shooting "Missing" Data via Record Audits

Record Audit Action Filters to use:

- Record Created

Trouble Shooting "Missing" Data via Record Audits

<u>Record Audit Action Filters to use:</u>

- Record Created

- Record Modified

Bonterra

Trouble Shooting "Missing" Data via Record Audits

<u>Record Audit Action Filters to use:</u>

- Record Created

- Record Modified

- Record Archived

Trouble Shooting "Missing" Data via Record Audits

Record Audit Action Filters to use:

- Record Created

- Record Modified

- Record Archived

- Program Added

Bonterra

Data Clean Up

Data Clean Up via Archived Records

- Remove fake records

- Remove duplicated Tier 2 data

- Remove inaccurate Tier 2 data

- Admin **only** by default

Bonterra
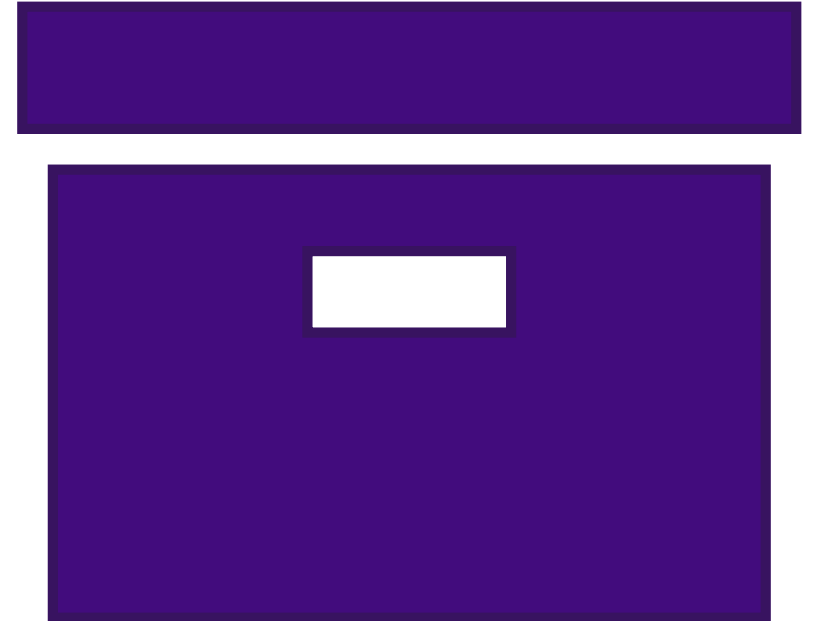
Data Clean Up via Archived Records

Steps

1. Open the desired record in the edit view

2. Click Archive Record in Record Actions palette

3. Notice the record is no longer visible when searching

Data Clean Up via Archived Records

- Archived data **is not deleted** but **does not** show in reports

- Can be viewed in Admin Tab

- Can be restored if needed

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!

Bonterra

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

Bonterra™

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!

Bonterra™

Thank you for attending!

We hope to see you
in future trainings.

Bonterra™