

Apricot Troubleshooting Your Data Upload: A Best Practice Guide

Meet Your Trainer

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Learning Objective

Share best practices for working with Import Tool so that Administrators can feel confident when uploading data into the software.

Agenda

Formatting Mistakes

Assigning Programs

Updating Data via Imports

Formatting Mistakes

Formatting Mistakes

Common Challenges:

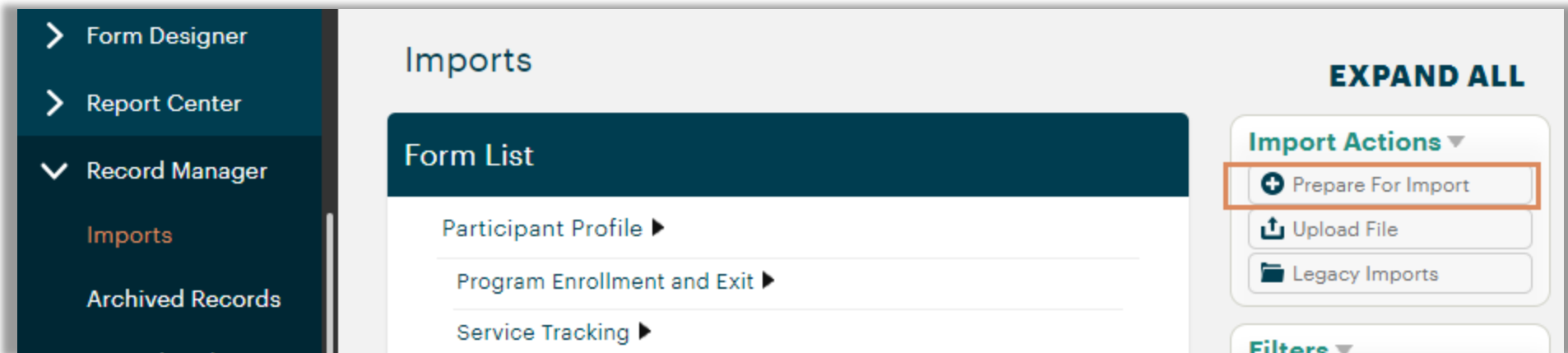
- Inaccurate characters
- Inaccurate values
 - Does NOT clean up data*

	A	B	C	D	E
1	First Name	Name_last	Birthdate	Gender	How did you hear about
2	David	Smith	4/26/2017	Male	Newspaper Friends
3	Anthony	Fake	4/26/2017	Male	Internet Referral
4	Thor	Odinson	4/26/2017	Male	Friend
5	Clint	Barton	4/26/2017	Male	Other
6	Steve	Rodgers	4/26/2017	Male	Newspaper
7	Jim	Jones	3/8/1961	Male	Other
8	Clara	Clark	4/8/1963	Female	Referral
9	Mike	Thomas	3/7/1989	Male	Referral
10	Eamon	George	4/4/1991	Male	Friends
11	Margi	Hughes	5/30/1993	Female	Friends
12	Jimmy	Hughes	12/1/1995	Male	Other
13	Declan	Hughes	8/1/1997	Male	Internet
14	Cormac	Hughes	9/30/1999	Male	Internet
15	Daniel	Hughes	5/5/2005	Male	Friends
16	William	Hughes	8/26/2008	Mail	Internet

Formatting Mistakes

Best Practice:

- Always Use Prepare for Import



The screenshot displays a software interface with a dark teal sidebar on the left and a main content area. The sidebar contains the following menu items: 'Form Designer', 'Report Center', 'Record Manager' (with a downward arrow), 'Imports' (highlighted in orange), and 'Archived Records'. The main content area is titled 'Imports' and features a 'Form List' section with three items: 'Participant Profile', 'Program Enrollment and Exit', and 'Service Tracking'. On the right side of the main content area, there is an 'EXPAND ALL' button and an 'Import Actions' dropdown menu. The 'Import Actions' menu is open, showing three options: 'Prepare For Import' (highlighted with an orange border), 'Upload File', and 'Legacy Imports'. Below the 'Import Actions' menu is a 'Filters' dropdown menu.

Formatting Mistakes

Best Practice:

- Always Use Prepare for Import
- Always Use Import Instructions

CSV Preview ▼

Column ID	field_2_first	field_2_middle	field_2_last	field_95	field_100	field_96	field_98	field_7	field_9
Column Name	*Participant Profile - Participant Name: first	Participant Profile - Participant Name: middle	*Participant Profile - Participant Name: last	*Participant Profile - Date of Birth	Intake Date	Client Status	How did you hear about us?	Client Phone Number	Client Email

Import Actions ▼

- Download CSV File
- Print Instructions
- Return to Imports

Import Instructions for Inserting Participant Profile Using Duplicate Checks ▼

*** Participant Profile - Participant Name (field_2)**
Any value (including special characters).
The first name and last name fields are required, but the middle name field is not.

*** Participant Profile - Date of Birth (field_95)**
Accepts the following date formats
YYYYMMDD
YYYY-MM-DD
January 1st, 2009
Jan 1 2009
mm/dd/yyyy

Intake Date (field_100)
Accepts the following date formats
YYYYMMDD
YYYY-MM-DD
January 1st, 2009
Jan 1 2009

Formatting Mistakes

Best Practice:

- Always Use Prepare for Import
- Always Use Import Instructions
 - Print
 - Save

The screenshot displays a software interface for preparing data for import. On the left, a form titled 'Participant Profile' is visible, with a section for 'Import Instructions for Inserting Participant Profile Using Duplicate Checks'. This section contains several fields with specific formatting requirements:

- Participant Profile - Participant Name (Field_2):** Any value (including special characters). The first name and last name fields are required, but the middle name field is not.
- Participant Profile - Date of Birth (Field_98):** Accepts the following date formats: YYYYMMDD, YYYY-MM-DD, January 1st, 2009, Jan 1 2009, mm/dd/yyyy.
- Intake Date (Field_100):** Accepts the following date formats: YYYYMMDD, YYYY-MM-DD, January 1st, 2009, Jan 1 2009, mm/dd/yyyy.
- Client Status (Field_96):** Any one of the following values (also allows other): Active, Inactive.
- How did you hear about us? (Field_98):** Any number of the following values separated by a | character: Internet, Newspaper, Radio.
- Client Phone Number (Field_3):** Accepts numerals, spaces and the following symbols: () - ext x #. Examples: 555-555-5555, 555.555.5555, 555-555-5555 ext.55, (555) 555-5555.
- Client Email (Field_97):** Any number of characters followed by an @ followed by any number of characters.

On the right side of the interface, a 'Print' menu is open, showing options for 'Destination' (Save as PDF), 'Pages' (All), and 'Layout' (Portrait). An orange arrow points to the 'Print Instructions' option in the 'Import Actions' dropdown menu. At the bottom of the print menu, there are 'Save' and 'Cancel' buttons. The interface also shows a user profile for 'Ina Gilbert' and a page count of '2 pages'.

Assigning Programs

Assigning Programs

Common Challenges:

- Names instead of Program IDs
- Wrong Program ID numbers
- Failing to use pipe character for multi-values*

	A	B	C	D	E	F
1	First Name	Name_last	Birthdate	Gender	How did you hear about	Program
2	David	Smith	4/26/2017	Male	Newspaper Friends	Better Homes
3	Anthony	Fake	4/26/2017	Male	Internet Referral	Empowering Families
4	Thor	Odinson	4/26/2017	Male	Friend	676, 83
5	Clint	Barton	4/26/2017	Male	Other	38,676
6	Steve	Rodgers	4/26/2017	Male	Newspaper	83
7	Jim	Jones	3/8/1961	Male	Other	Better Homes
8	Clara	Clark	4/8/1963	Female	Referral	College Prep
9	Mike	Thomas	3/7/1989	Male	Referral	College Prep
10	Eamon	George	4/4/1991	Male	Friends	Empowering Families

Assigning Programs

Best Practices:

- Import one program at a time

	A	B	C	D	E	F
1	First Name	Name_last	Birthdate	Gender	How did you hear about	Program
2	David	Smith	4/26/2017	Male	Newspaper Friends	676
3	Anthony	Fake	4/26/2017	Male	Internet Referral	676
4	Thor	Odinson	4/26/2017	Male	Friend	676
5	Clint	Barton	4/26/2017	Male	Other	676
6	Steve	Rodgers	4/26/2017	Male	Newspaper	676
7	Jim	Jones	3/8/1961	Male	Other	676
8	Clara	Clark	4/8/1963	Female	Referral	676
9	Mike	Thomas	3/7/1989	Male	Referral	676
10	Eamon	George	4/4/1991	Male	Friends	676
11	Margi	Hughes	5/30/1993	Female	Friends	676
12	Jimmy	Hughes	12/1/1995	Male	Other	676
13	Declan	Hughes	8/1/1997	Male	Internet	676
14	Cormac	Hughes	9/30/1999	Male	Internet	676
15	Daniel	Hughes	5/5/2005	Male	Friends	676
16	William	Hughes	8/26/2008	Mail	Internet	676

Assigning Programs

Best Practices:

- Import **one** program at a time
- Exclude the Assigned Program from CSV file

	A	B	C	D	E
1	First Name	Name_last	Birthdate	Gender	How did you hear about
2	David	Smith	4/26/2017	Male	Newspaper Friends
3	Anthony	Fake	4/26/2017	Male	Internet Referral
4	Thor	Odinson	4/26/2017	Male	Friend
5	Clint	Barton	4/26/2017	Male	Other
6	Steve	Rodgers	4/26/2017	Male	Newspaper
7	Jim	Jones	3/8/1961	Male	Other
8	Clara	Clark	4/8/1963	Female	Referral
9	Mike	Thomas	3/7/1989	Male	Referral
10	Eamon	George	4/4/1991	Male	Friends

Assigning Programs

Best Practices:

- Import **one** program at a time
- Exclude the Assigned Program from CSV file
 - Assign Program during Import

Import Overview

Assign Programs

Owner for New Records
Sabrina Gilbert

Available Programs Add All >>

- Advocacy
- Better Homes
- College Prep
- Counseling
- Empowering Families

Assigned Programs << Remove

Add >

< Remove

Use the Add and Remove buttons above to update program assignment

Imports will default to these program assignments when the column(s) are not included in the csv and/or the row values for the assignment column(s) are empty

Apply

Import Actions

- Assign Access
- Run All
- Cancel Import
- Return to Import List

Import Progress

- Queued
- Uploaded ✓
- Assigned
- Verified
- Prepared
- Validated
- Reconciled
- Imported
- Reverted
- Archived

Last Changed
06/22/2023 1:33 PM CDT
Sabrina Gilbert

Updating Data

Updating Data

Common Challenges:

- Uploading blank values
- Missing/ inaccurate Record IDs

	A	B	C	D	E	F
1	First Name	Name_last	Birthdate	Record ID	Service Type	Service Time in Hours
2	David	Smith	4/26/2017	234		1.5
3	Anthony	Fake	4/26/2017	122		1
4	Thor	Odinson	4/26/2017	166	Coaching Session	2
5	Clint	Barton	4/26/2017		Coaching Session	2
6	Steve	Rodgers	4/26/2017		Coaching Session	2
7	Jim	Jones	3/8/1961	321	Resource Session	1.5
8	Clara	Clark	4/8/1963	221	Resource Session	0.75
9	Mike	Thomas	3/7/1989	345	Resource Session	0.75
10	Eamon	George	4/4/1991			1.5
11	Margi	Hughes	5/30/1993			1
12	Jimmy	Hughes	12/1/1995		Job Search Supports	1

Updating Data

Best Practices:

- Pull & export Record IDs via Report Builder

The screenshot displays a data report interface. At the top, there is a search bar and a status indicator: "Displaying 17 of 17 Rows (Expand All Cells)". Below this is a table with the following columns: Client Record ID, First, Last, Service Date, Service Type, and Service Record ID. The table contains 17 rows of data. To the right of the table is a sidebar titled "Report Actions" which includes buttons for Edit, Refresh All Sections, Print Mode, Export, Full Screen, Reset Filters, and Return to List. The "Export" button is highlighted with an orange border.

Client Record ID	First	Last	Service Date	Service Type	Service Record ID
35	Asher	Billingslea	2023	Counseling - Group Session	852
35	Asher	Billingslea	2023	Counseling - Group Session	857
36	Sarah	Greene	2023	Counseling - Group Session	862
36	Sarah	Greene	2023	Counseling - Group Session	868
239	Alvy	Singer	2023	Counseling - Group Session	850
239	Alvy	Singer	2023	Counseling - Group Session	856
413	Jaquie	Thompson	2023	Counseling - Group Session	859
450	Luther	Henderson	2023	Counseling - Group Session	861
453	Lara	Crofton	2023	Counseling - Group Session	860
456	Alonzo	LaBatsille	2023	Counseling - Group Session	849
623	Ashton	Carter	2023	Counseling - Group Session	853
688	Alicia	Henry	2023	Counseling - Group Session	847
688	Alicia	Henry	2023	Counseling - Group Session	854
790	Alonzo	LaBarca	2023	Counseling - Group Session	848
790	Alonzo	LaBarca	2023	Counseling - Group Session	855
797	Apple	Moore	2023	Counseling - Group Session	851
803	Dave	Robinson	2023	Counseling - Group Session	858

Updating Data

Best Practices:

- Pull & export Record IDs via Report Builder
- Only include field(s) to be updated in CSV file

	A	B	C	D	E
1	First Name	Name_last	Birthdate	Record ID	Service Time in Hours
2	David	Smith	4/26/2017	234	1.5
3	Anthony	Fake	4/26/2017	122	1
4	Thor	Odinson	4/26/2017	166	2
5	Clint	Barton	4/26/2017		2
6	Steve	Rodgers	4/26/2017		2
7	Jim	Jones	3/8/1961	321	1.5
8	Clara	Clark	4/8/1963	221	0.75
9	Mike	Thomas	3/7/1989	345	0.75
10	Eamon	George	4/4/1991		1.5
11	Margi	Hughes	5/30/1993		1
12	Jimmy	Hughes	12/1/1995		1
13	Declan	Hughes	8/1/1997		2
14	Cormac	Hughes	9/30/1999		2
15	Daniel	Hughes	5/5/2005		1.5
16	William	Hughes	8/26/2008		1

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.