

# Uploading Data into Apricot Webinar

# Meet Your Trainer

First Name Last Name

Training & Development Associate

# Learning Objective

Provide administrators with foundational skills for using the Import Tool to upload new data into the software

# Agenda

What Is The Import Tool

Prepare Import Template

Prepare Your Data

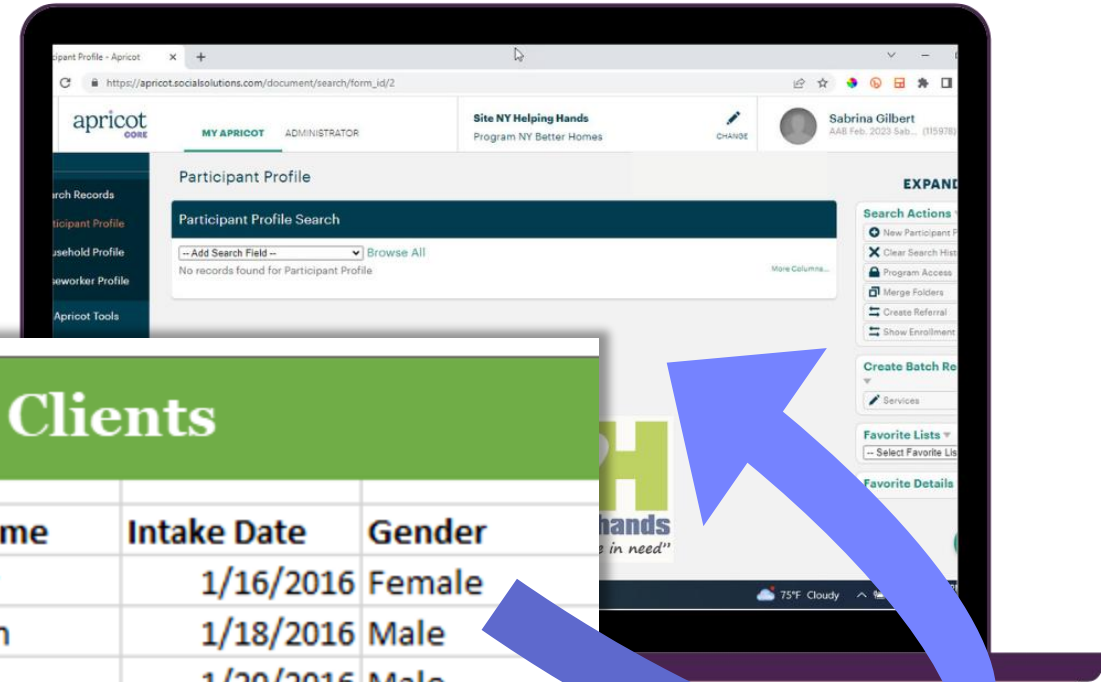
Import Data

# What Is The Import Tool

# What is the Import Tool?

- Upload spreadsheet of data into software
- Import thousands of records at one time.
- Can Upload both Tier 1 and Tier 2 Data
  - Import Tier 1 records first.
  - Tier 2 records must be associated with a Tier 1 record.

Our Active Clients			
First Name	Last Name	Intake Date	Gender
Sandy	Farmer	1/16/2016	Female
Morris	Pittman	1/18/2016	Male
Richard	Merritt	1/20/2016	Male
Patty	Hart	1/25/2016	Female
Peirre	Avery	1/30/2016	Male
Robin	Garrison	2/1/2016	Female
Vincent	Bowen	2/2/2016	Male
Shane	Garcia	2/8/2016	Male



# Prepare Import Template

# Prepare Import Template

- Excel Sheet must be formatted correctly
- Prepare Import tool creates blank template with proper formatting
- Best practice to use it every time

The screenshot shows an Excel spreadsheet with the following structure:

System Header Row DO NOT DELETE THIS ROW OR THIS COLUMN!							
	field_2_first	field_2_middle	field_2_last	field_95	field_100	field_96	
1							
2	{	*Participant Profile - Participant Name: first	Participant Profile - Participant Name: middle	*Participant Profile - Participant Name: last	*Participant Profile - Date of Birth	Intake Date	Client Status
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							

Callout 1: Successful Upload Requires System Header Row; Prepare for Import creates this row for you!

Callout 2: Column Headers must be exact match for field names; Prepare for Import ensures accuracy



# Prepare Import Template

## Steps:

1. Imports > Prepare for Import

The screenshot displays the Bonterra software interface. On the left, a dark sidebar contains a navigation menu with the following items: Form Designer, Report Center, Record Manager (expanded), Imports (highlighted with a 'Start' button), Archived Records, Record Audits, Access Control, and Workflow Station. The main content area is titled 'Imports' and features a 'Form List' with the following entries: Participant Profile, Program Enrollment and Exit, Service Tracking, Positive Parenting Assessment, and Workshop Attendance. On the right side, there is an 'EXPAND ALL' button, an 'Import Actions' section with a '1' in a circle next to the 'Prepare For Import' button, and a 'Filters' section with options for 'Date' (All, Creation Time, Modification Time) and 'Import Progress'.

# Prepare Import Template

## Steps:

1. Imports > Prepare for Import
2. Select the Form
3. Select the Import Type
4. Select Options (if desired)
5. Select Record Action

The screenshot shows a web interface titled "Prepare for Import". Below the title is a dark teal header labeled "Import Configuration". The main content area is divided into five sections, each highlighted with an orange box and a numbered callout (2-5):

- 2 Form:** A dropdown menu with "Participant Profile" selected.
- 3 Import Type:** Radio buttons for "Data" (selected) and "Linking".
- 4 Options:** A checkbox for "Enforce All Required Fields" which is unchecked.
- 5 Record Action:** Radio buttons for "Create New" (selected), "Update Existing", and "Both".

At the bottom of the form, there is a section titled "Reconcile Participant Profile Records Using" with a radio button for "Duplicate Check Fields" which is selected.

# Prepare Import Template

## Steps:

1. Imports > Prepare for Import
2. Select the Form
3. Select the Import Type
4. Select Options (if desired)
5. Select Record Action
6. Ensure desired columns are selected
7. Click Download CSV File on the right

**Column Selection** ▼

**6**

**Profile Details** Unselect All

- Participant Name : first [field\_2\_first]\*
- Participant Name : middle [field\_2\_middle]\*
- Participant Name : last [field\_2\_last]\*
- Date of Birth [field\_95]\*
- Intake Date [field\_100]
- Client Status [field\_96]
- How did you hear about us? [field\_98]
- Client Phone Number [field\_7]
- Client Email [field\_97]

**Demographic Information** Unselect All

- Gender [field\_8]
- Race [field\_147]
- Marital Status [field\_329]
- Ethnicity [field\_444]
- Employed [field\_328]
- Parent [field\_330]
- Monthly Income [field\_282]
- Employer [field\_284]

**7** **Import Actions** ▼

- Download CSV File
- Print Instructions
- Return to Imports

# Prepare Your Data

# Prepare Your Data

- Import Template will only have headers
- Export data from old system
  - Excel Format Recommend
- QA check your data

## Our Active Clients

First Name	Last Name	Intake Date	Gender	DOB	Address	City	State	Zip Code	Household Size	Staff Initials
Sandy	Farmer	1/16/2016	Female	3/15/1980	1568 N. Lamar	Austin	Texas	78759	2	RWM
Morris	Pittman	1/18/2016	Male	2/2/1975	9005 W. Anders	Austin	Texas	78562	2	RWM
Richard	Merritt	1/20/2016	Male	6/15/1985	201 Ricardo Ct.	Austin	Texas	78745	4	HES
Patty	Hart	1/25/2016	Female	2/20/1995	577 River Road	Austin	Texas	78954	2	JWD
Peirre	Avery	1/30/2016	Male	10/2/1981	1215 Merril Ct.	Austin	Texas	78704	1	JMS
Robin	Garrison	2/1/2016	Female	9/13/1978	905 Annover	Austin	Texas	78727	5	MJB
Vincent	Bowen	2/2/2016	Male	7/5/2001	1919 Bluebonn	Austin	Texas	78736	3	LDR
Shane	Garcia	2/8/2016	Male	5/5/1982	1208 Cresent	Austin	Texas	78562	1	LDR

# Prepare Your Data

- 1 record per row

The screenshot shows the Microsoft Excel interface with the following data table:

Header	B	C	D	E	F
DELETE W					
1	field_2_first	field_2_middle	field_2_last	field_95	field_100
2	*Participant Profile - Participant Name: fir	Participant Profile - Participant Name: mid	*Participant Profile - Participant Name:	*Participant Profile - Date of Bir	Intake Date
3	Sandy		Farmer	3/15/1980	1/16/2016
4	Morris		Pittman	2/2/1975	1/18/2016
5					
6					
7					
8					
9					
10					
11					
12					

An orange callout box with the text "Each Participant Record is on a different row." points to the data rows in the table.

# Prepare Your Data

- 1 record per row
- Copy and Paste

The image shows a data transfer process. On the left, a table titled "Our Active Clients" contains the following data:

First Name	Last Name	Intake Date
Sandy	Fair	
Morris	Pitt	
Richard	Mer	
Patty	Hart	
Peirre	Avery	2/20/2016
Robin	Garrison	2/1/2016
Vincent	Bowen	2/2/2016
Shane	Garcia	2/8/2016

A large blue arrow points from this table to a screenshot of a spreadsheet application. The spreadsheet shows a grid with columns A and B. The data from the table is being pasted into the spreadsheet, with the first row of data (Sandy) appearing in row 2, column B. The spreadsheet interface includes a tab labeled "ParticipantProfile (13)" and a status bar at the bottom showing "Count: 8".

# Prepare Your Data

- 1 record per row
- Copy and Paste
- Formatting guidelines in Import Instructions

**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  
mm/dd/yyyy

**Client Status (field\_96)**  
Any one of the following values (also allows other)  
Active  
Inactive

**Import Actions** ▼

- Download CSV File
- Print Instructions
- Return to Imports

Navigation icons: Home (up arrow), Help (speech bubble).



# Prepare Your Data

## Tier 2 Imports Required Data:

- Tier 1 Duplicate Check Fields

OR

- Tier 1 Record ID

Participant List w/Record ID

Forms

Participant Profile (Always)

Filters

Limit Sections

Report last run June 14th 2023, 3:06 pm  
Click to refresh data  
Results limited to the first 10 Rows.

First	Last	Date of Birth	Record ID
Adam	Voght	09/21/1987	816
Alicia	Henry	08/19/1965	688
Alonzo	LaBatsille	03/04/1998	456
Alonzo	LaBarca	04/03/1998	790
Alvy	Singer	10/01/1978	239
Andrew	Jones	05/16/1985	448
April	Billingslea	04/15/1982	34

Field Choices

Special Columns

Assessment

Outreach Form

Participant Profile

Profile Details

Demographic Information

Linked 'Incoming Referral' Records

Associated Household

System Fields

Record ID

Created By

Creation Date

Modified By

Modification Date

Add Multiple Columns

Requirements

All checks passed

Report Actions

Add New Section

# Import Data

# Import Data

## Steps:

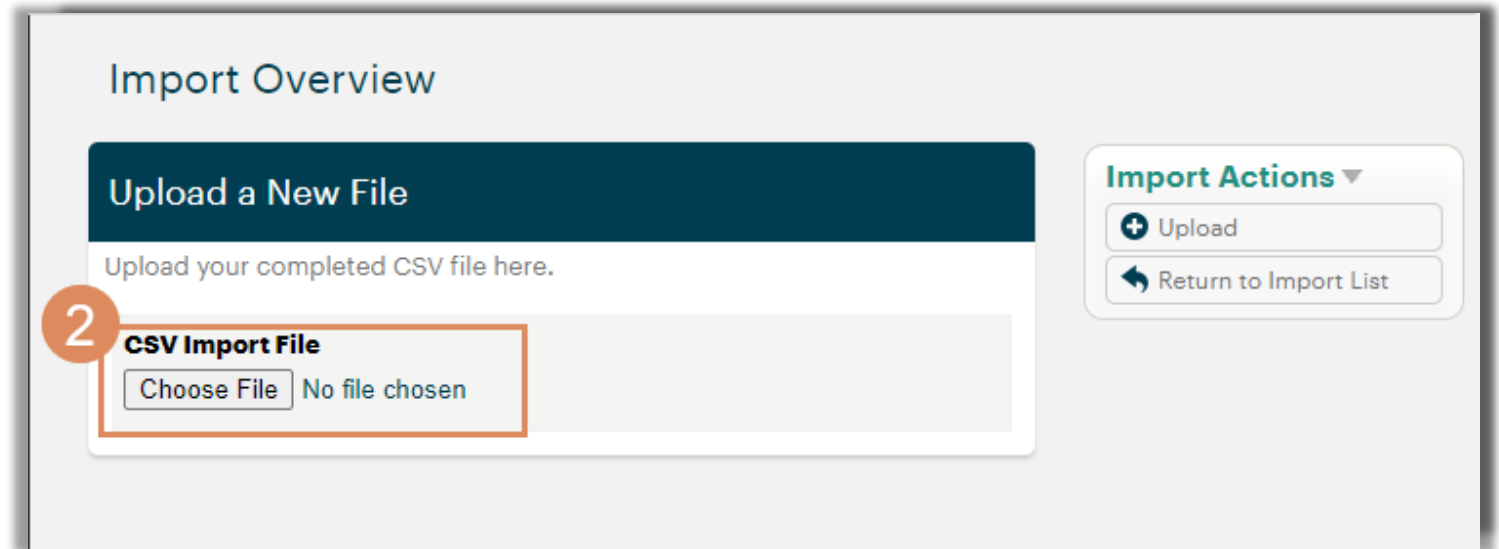
1. Import Tools > Upload Files

The screenshot displays the 'Imports' section of the Bonterra software interface. On the left, a dark teal sidebar contains a navigation menu with the following items: 'Form Designer', 'Report Center', 'Record Manager' (expanded), 'Imports' (highlighted in orange), 'Archived Records', 'Record Audits', 'Access Control', and 'Workflow Station'. The main content area is titled 'Imports' and features a 'Form List' with the following entries: 'Incoming Referral', 'Participant Profile', 'Services', 'Program Enrollment and Exit', 'Positive Parenting Assessment', and 'Workshop Attendance'. To the right of the main content, there are two panels: 'Import Actions' and 'Filters'. The 'Import Actions' panel includes a dropdown menu with three options: 'Prepare For Import', 'Upload File' (highlighted with a red box and a red circle containing the number '1'), and 'Legacy Imports'. The 'Filters' panel includes a dropdown menu with two sections: 'Date' (with radio buttons for 'All', 'Creation Time', and 'Modification Time') and 'Import Progress' (with radio buttons for 'All' and 'Queued'). An 'EXPAND ALL' button is located at the top right of the interface.

# Import Data

## Steps:

1. Import Tools > Upload Files
2. Select your CSV File

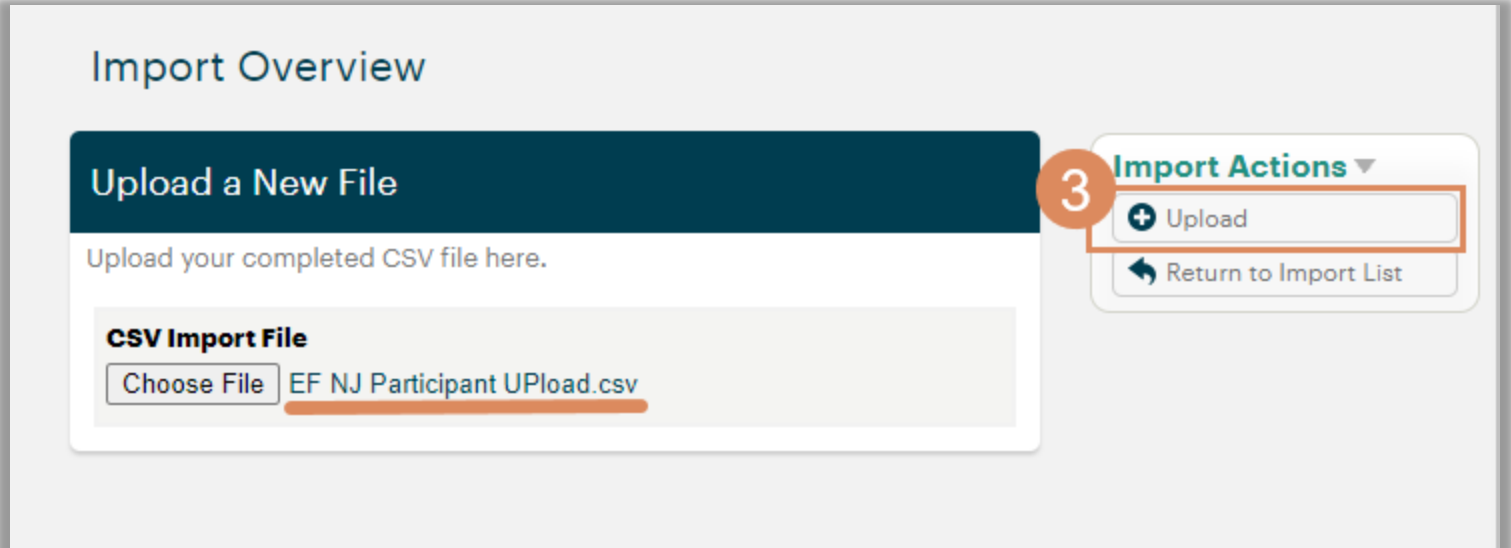


The screenshot displays the 'Import Overview' section of a web application. At the top, there is a dark teal header with the text 'Upload a New File'. Below this header, a light gray box contains the instruction 'Upload your completed CSV file here.' A prominent orange circle with the number '2' is overlaid on the left side of the interface, pointing to a file selection area. This area is titled 'CSV Import File' and contains a 'Choose File' button and the text 'No file chosen'. To the right of the main content area, there is a section titled 'Import Actions' with a dropdown arrow. It contains two buttons: 'Upload' with a plus icon and 'Return to Import List' with a back arrow icon.

# Import Data

## Steps:

1. Import Tools > Upload Files
2. Select your CSV File
3. Click Upload



The screenshot displays the 'Import Overview' page. At the top, there is a dark teal header with the text 'Upload a New File'. Below this, a light gray box contains the instruction 'Upload your completed CSV file here.' Underneath, a section titled 'CSV Import File' features a 'Choose File' button and a file name 'EF NJ Participant UPlod.csv' which is underlined. To the right, an 'Import Actions' dropdown menu is open, showing two options: '+ Upload' and 'Return to Import List'. An orange circle with the number '3' is positioned to the left of the 'Import Actions' menu, indicating the current step in the process.

# Import Data

## Steps:

1. Import Tools > Upload Files
2. Select your CSV File
3. Click Upload
4. Assign Access

Assign Programs

Click here to select the program where records should be visible

4

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
- 06/14/2023 2:22 PM CDT

Available Programs

- Advocacy
- Better Homes
- College Prep
- Counseling
- NJ Empowering Families**
- NY Better Homes
- NY Empowering Families

Assigned Programs

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 Data

## Steps:

1. Import Tools > Upload Files
2. Select your CSV File
3. Click Upload
4. Assign Access
5. Run All

The screenshot displays the 'Import Overview' page. It is divided into three main sections: 'General', 'Uploaded', and 'Import Actions/Progress'.  
1. **General**: Contains a 'Name' field with the text 'EF NJ Participant UPlod 06/14/2023' and an 'Update' button.  
2. **Uploaded**: Contains a 'File Name' field with 'EF NJ Participant UPlod.csv' and a 'Download' button. Below it, 'Uploaded By' is listed as 'Sabrina Gilbert' and 'Uploaded At' as '06/14/2023 2:22 PM CDT'.  
3. **Import Actions**: A dropdown menu with options: '+ Verify', 'Run All' (highlighted with an orange box and a callout), 'Cancel Import', and 'Return to Import List'.  
4. **Import Progress**: A list of status options: 'Queued', 'Uploaded' (with a green checkmark), 'Assigned' (with a green checkmark), 'Verified', 'Prepared', 'Validated', 'Reconciled', 'Imported', 'Reverted', and 'Archived'.  
5. **Last Changed**: Shows '06/14/2023 2:25 PM C' and 'Sabrina Gilbert' with a chat icon.  
An orange callout box with the number '5' points to the 'Run All' button. The text inside the callout reads: 'Run All informs the software to run all these steps automatically'.

# Import Data

## Steps:

1. Import Tools > Upload Files
2. Select your CSV File
3. Click Upload
4. Assign Access
5. Run All
6. Review the Imported Box for confirmation

The screenshot displays three sequential status boxes for a data import process:

- Validated:** A dark teal header with a white bar below it containing a green checkmark and the text "All rows validated".
- Reconciled:** A dark teal header with a white bar below it containing a green checkmark and the text "All rows reconciled successfully".
- Imported:** A dark teal header with a white bar below it containing a green checkmark, the text "Inserted", and "6 Rows". To the right of this bar are two buttons: "Get CSV" and "View". Below this bar is another white bar containing a green checkmark, the text "Access Applied", and "6 Rows".

The "Imported" section is highlighted with an orange border.



# Import Data

Test data

Search for on data entry tab

## Participant Profile

### Participant Profile Search

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

**Participant Name (Participant Profile)** [Clear Field](#) ✕

First  Middle  Last

The following 7 Participant Profile records matched your search criteria [More Columns...](#)

Participant Name ▼	Date Of Birth ▼	Client Status ▼	Client Email ▼	Gender ▼	Employed ▼
April Billingslea	04/15/1982	Active	aprilb@yahoo.com	Nonbinary	Yes
Asher Billingslea	06/09/1984	Active	abillingslea@gmail.com	Male	Yes
Chantel Burrows	11/23/1987			Female	
Chris Batten	01/02/1989	Pending	cb1109@mymail.com	Male	
Felicia Batten	06/12/1979	Pending	battenf@mymail.com	Female	
Kenny Black	02/05/1985	Active		Male	Yes
Sandra Barton	09/21/2000			Female	

# 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.