Uploading Data into Apricot Webinar

Bonterra™

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

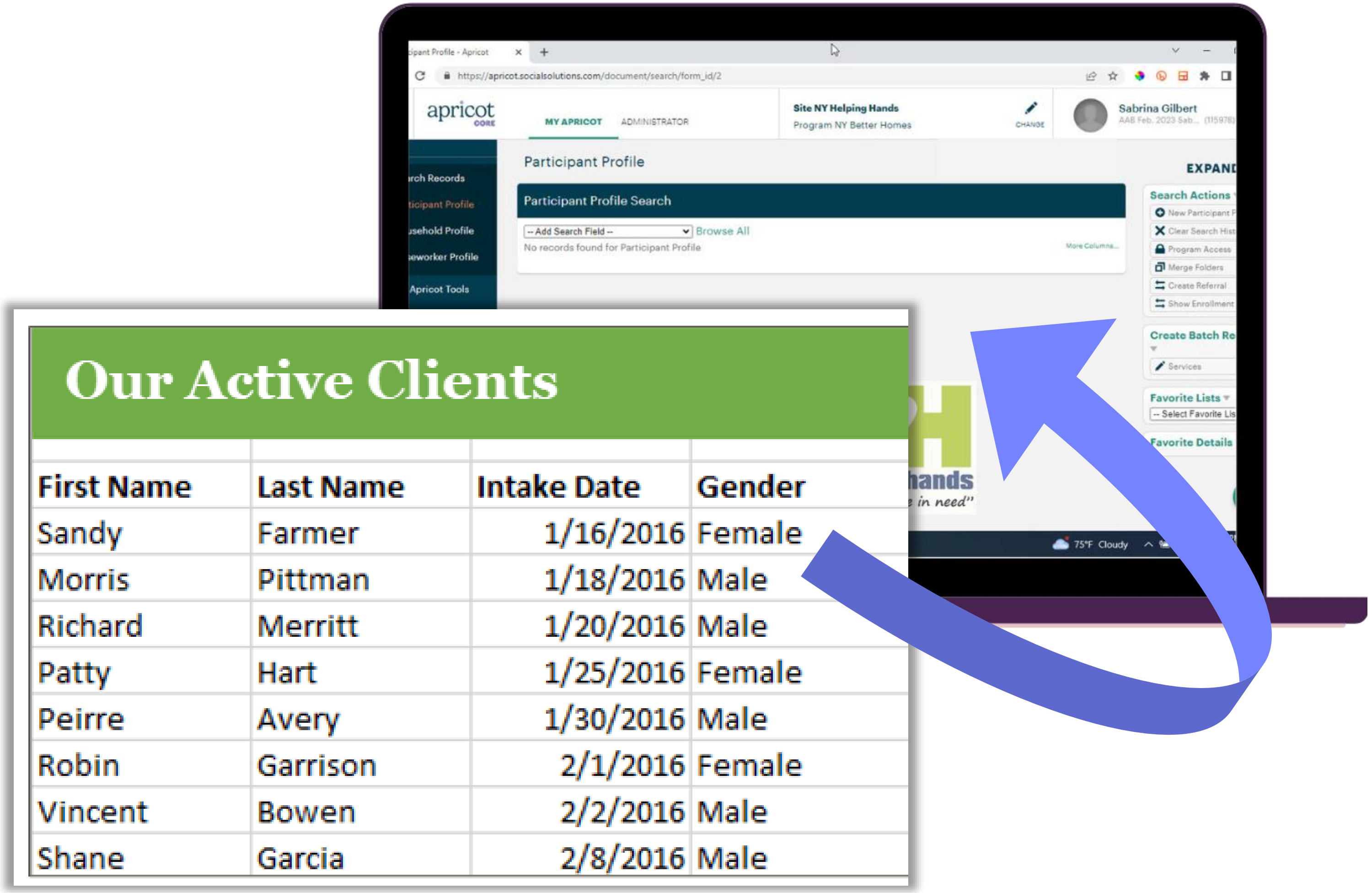
Agenda

- 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

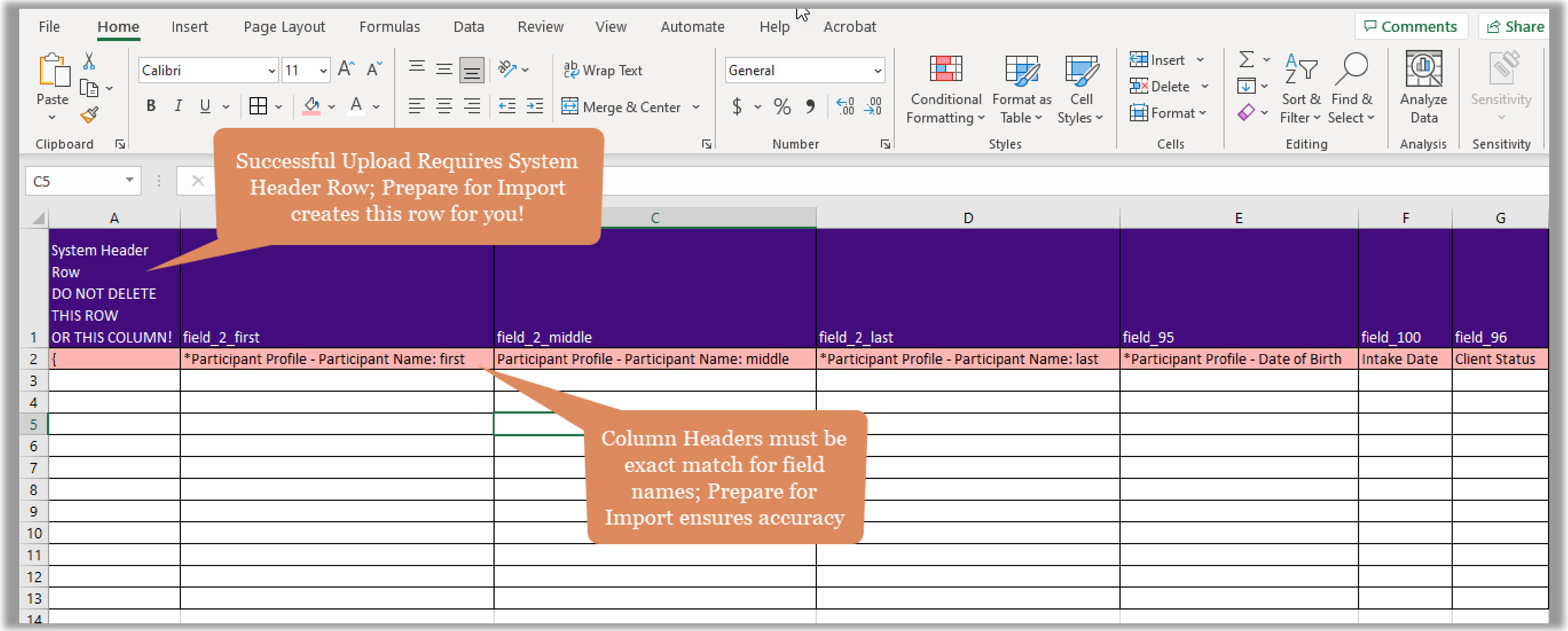
First Name	Last Name	Intake Date	Gender
Sandy	Farmer	1/16/2016	Female
Morris	Pittman	1/18/2016	Male
Richard	Merritt	1/20/2016	Male
Patty	Hart	1/25/2016	Female
Peirre	Avery	1/30/2016	Male
Robin	Garrison	2/1/2016	Female
Vincent	Bowen	2/2/2016	Male
Shane	Garcia	2/8/2016	Male

Bonterra

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

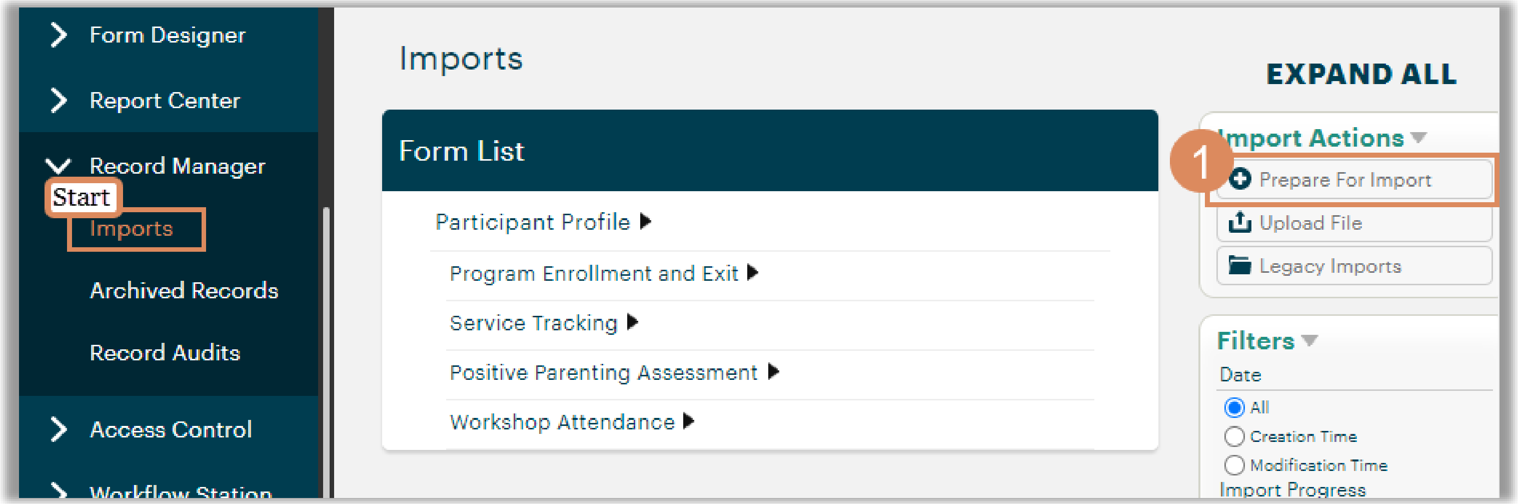


Bonterra

Prepare Import Template

Steps:

1. Imports > Prepare for Import

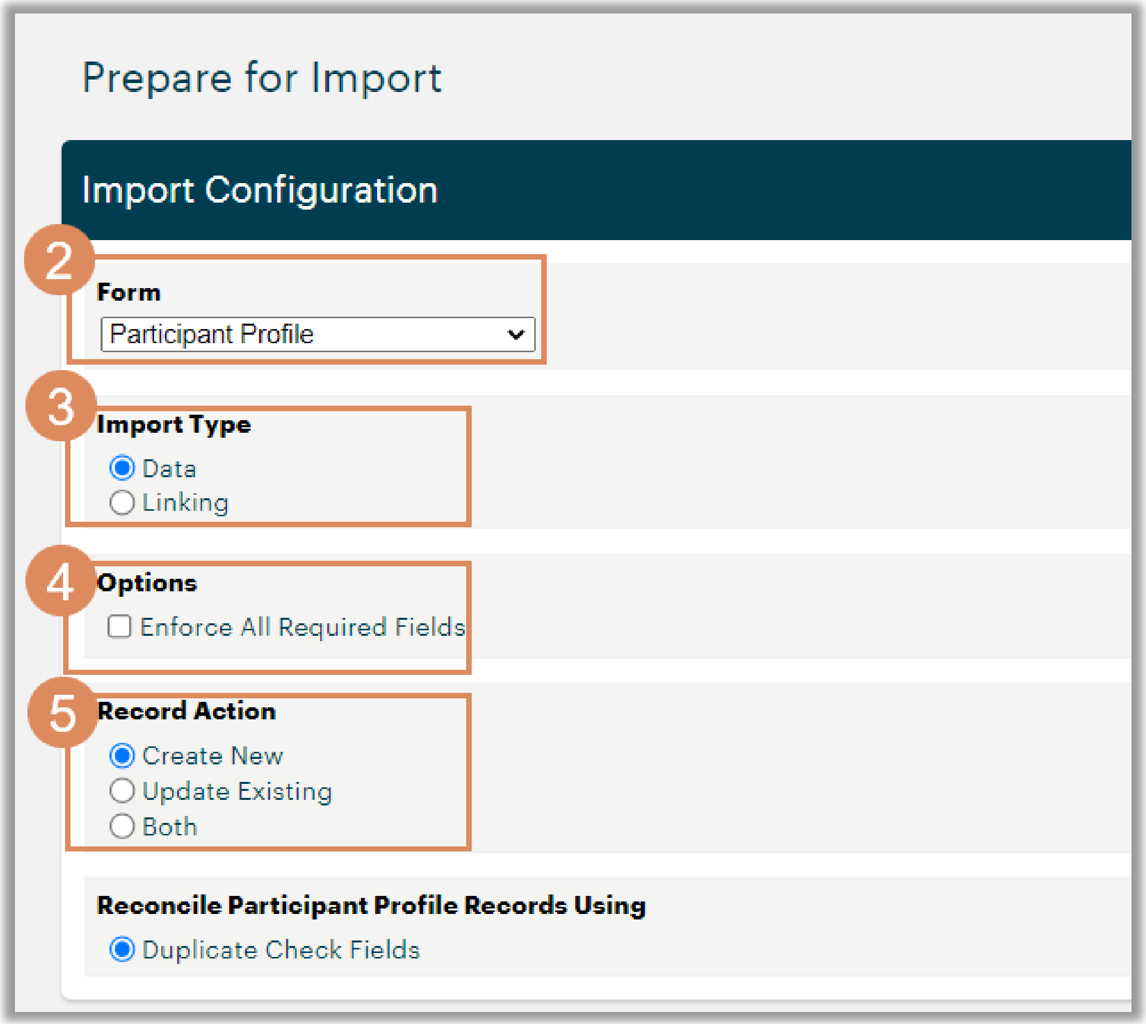


Bonterra

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



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

Bonterra

Prepare Your Data

Prepare Your Data

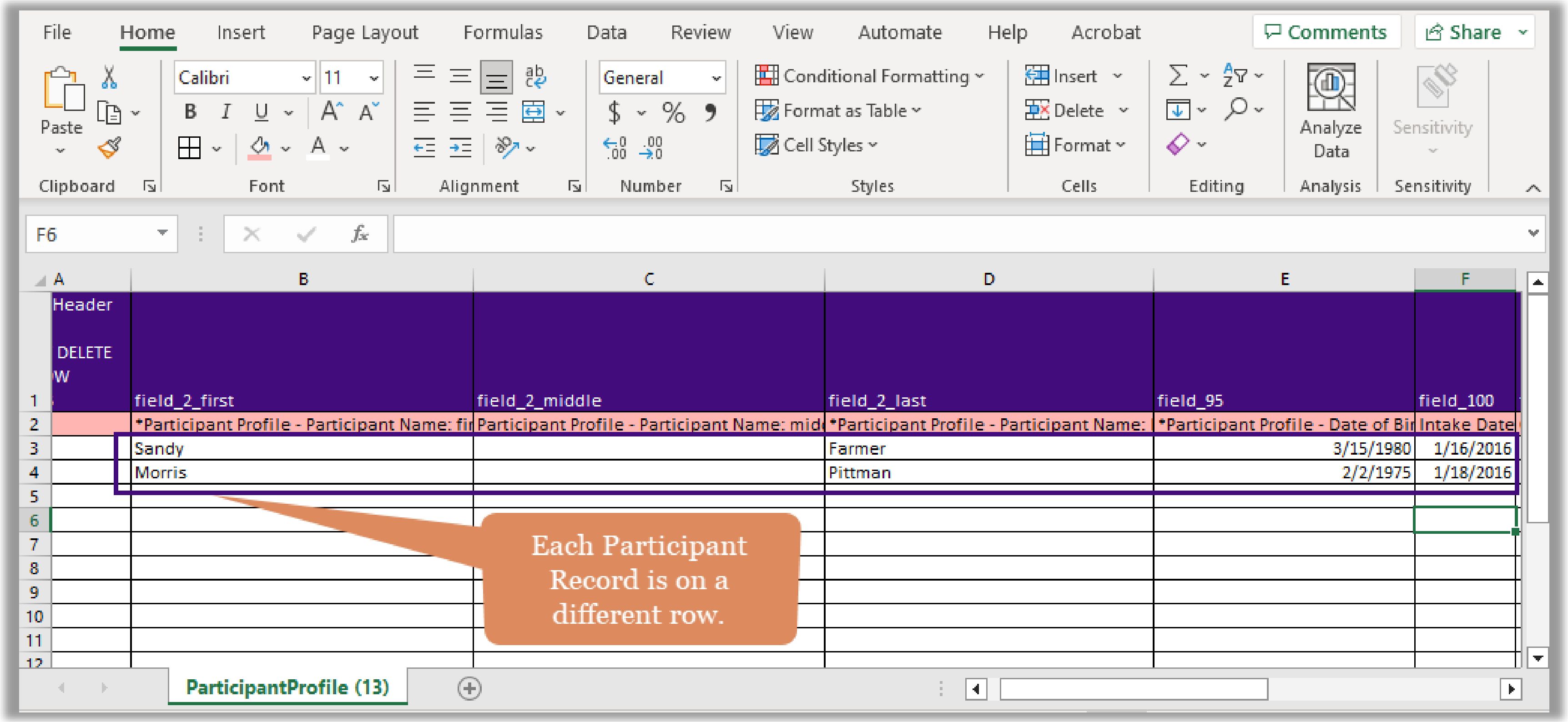
- Import Template will only have headers
- Export data from old system
  - Excel Format Recommend
- QA check your data

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

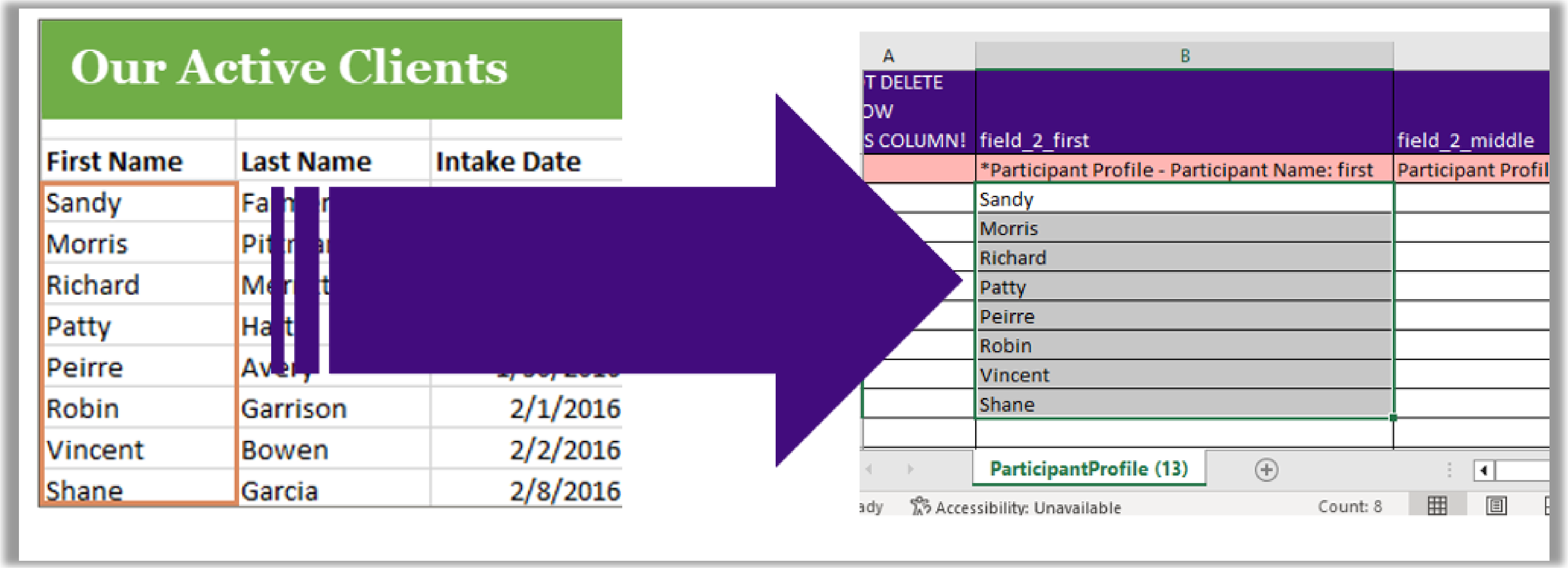
Prepare Your Data

- 1 record per row



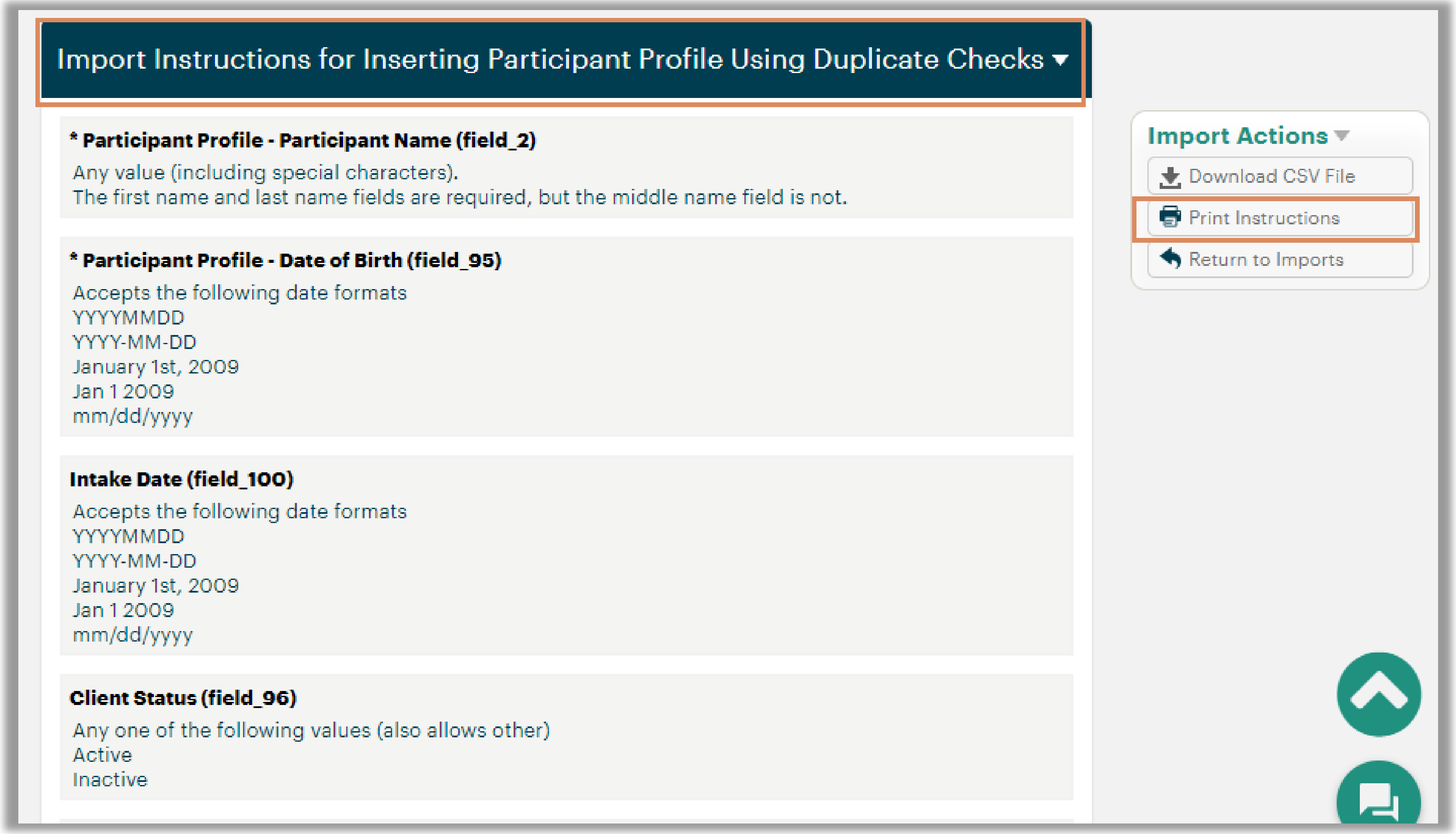
Prepare Your Data

- 1 record per row
- Copy and Paste



Prepare Your Data

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



Bonterra

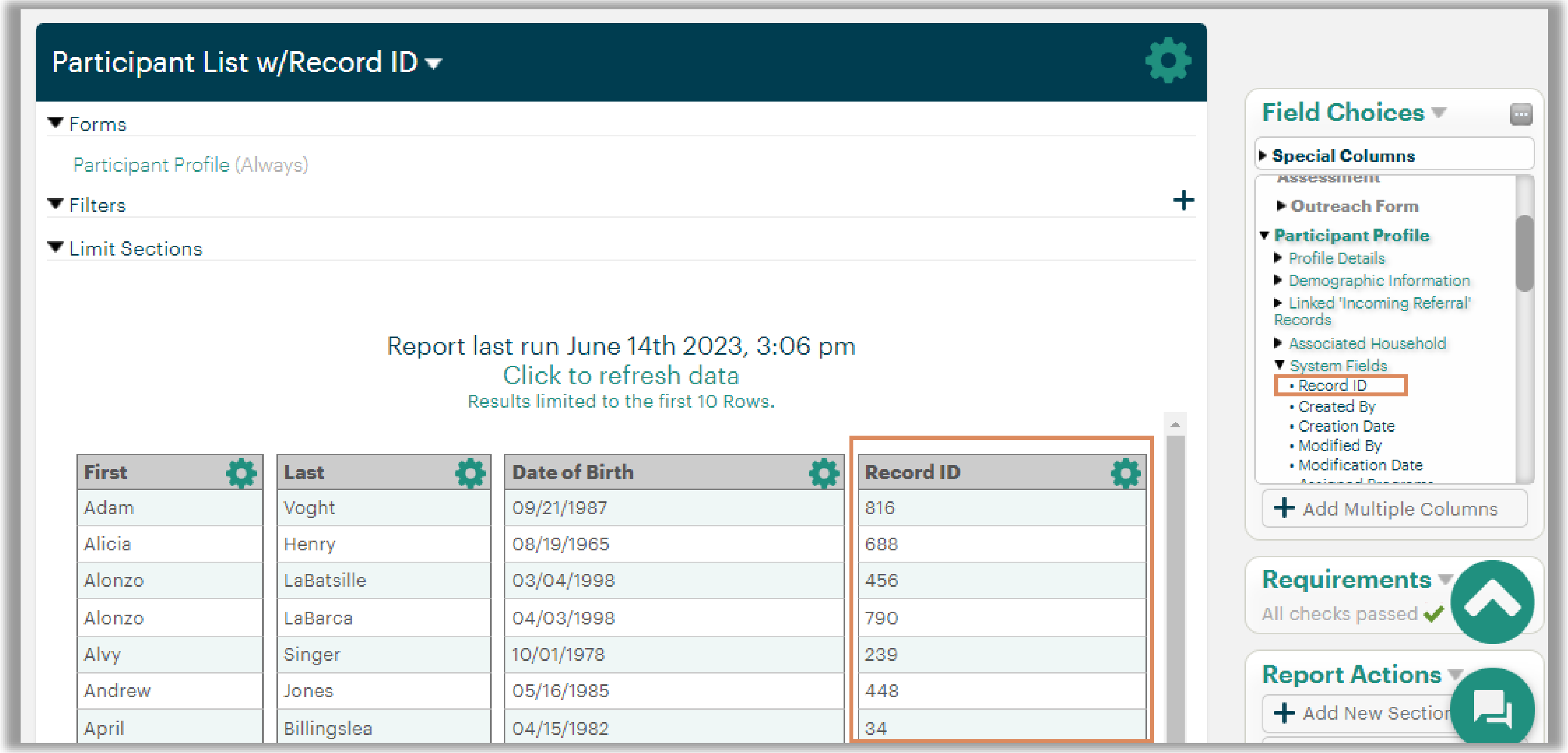
Prepare Your Data

Tier 2 Imports Required Data:

- Tier 1 Duplicate Check Fields

OR

- Tier 1 Record ID



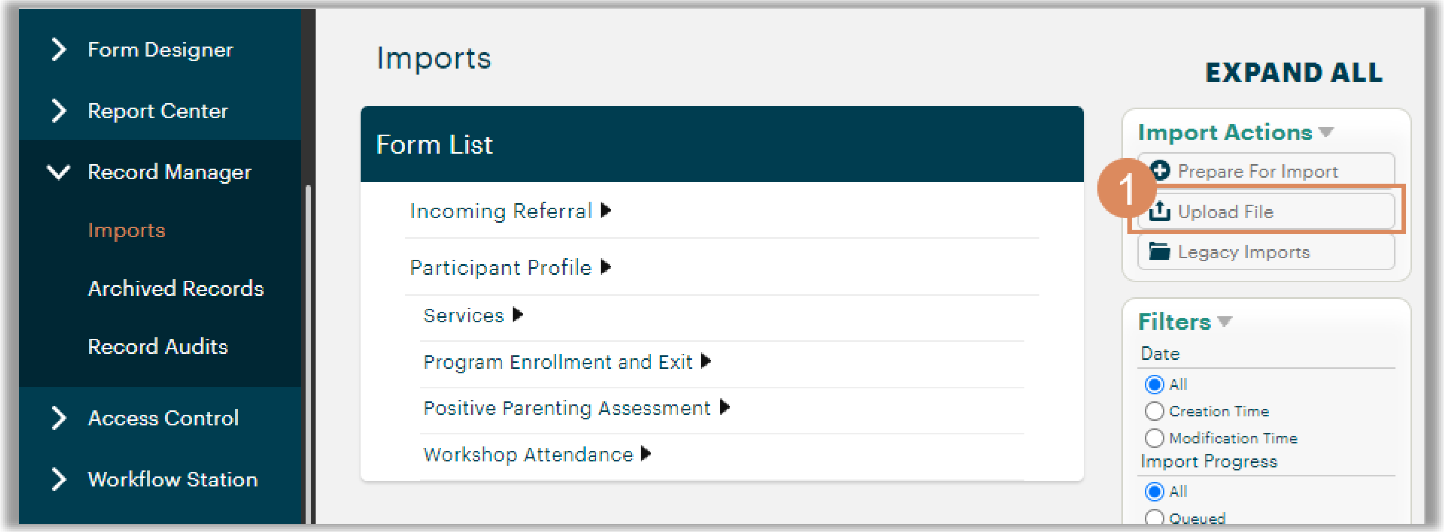
Import Data

Bonterra™

Import Data

Steps:

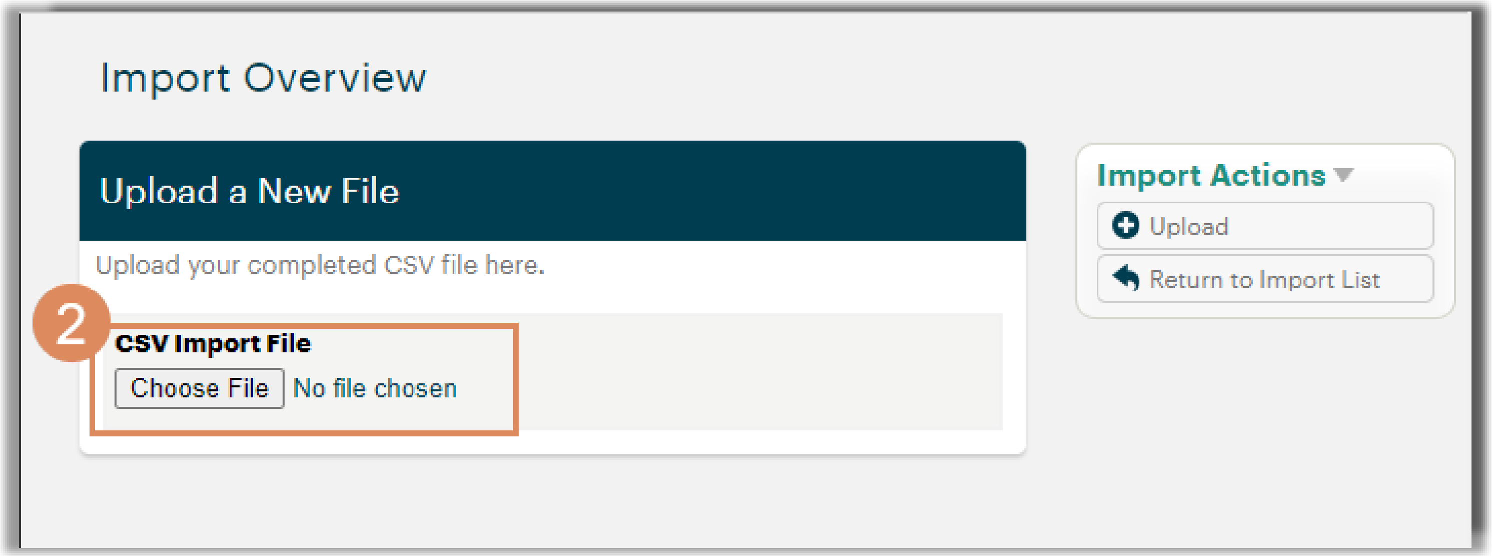
1. Import Tools > Upload Files



Import Data

Steps:

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

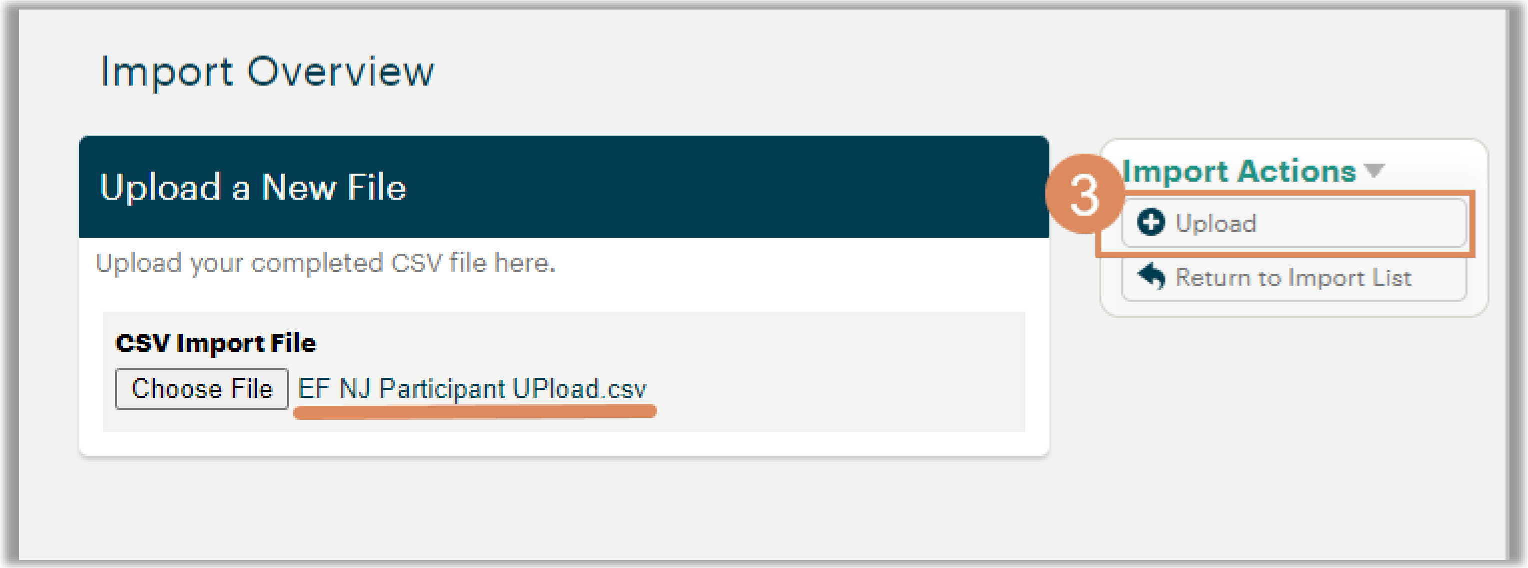


Bonterra

Import Data

<u>Steps:</u>

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

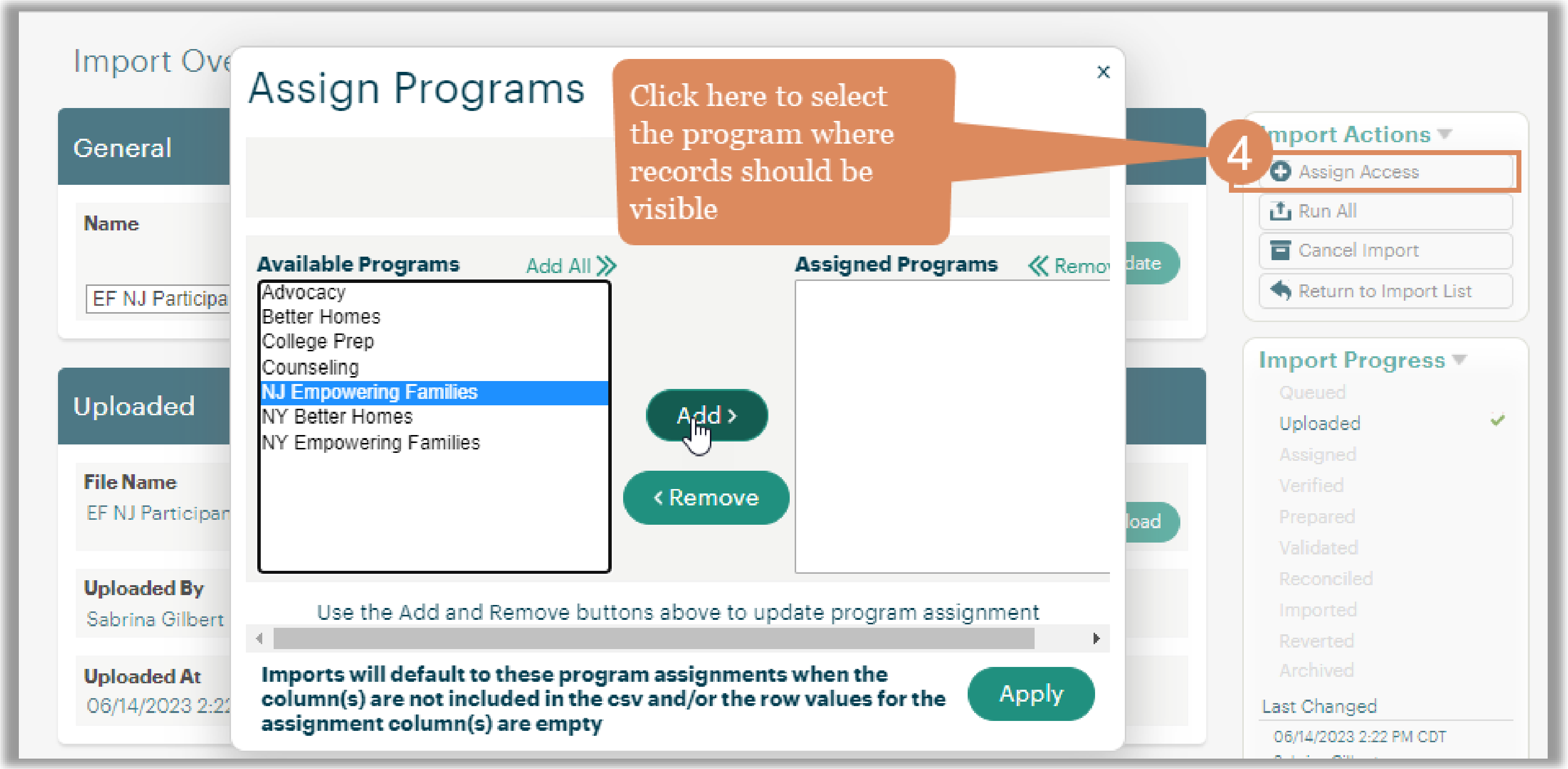


Bonterra

Import Data

<u>Steps:</u>

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



Bonterra

Import Data

<u>Steps:</u>

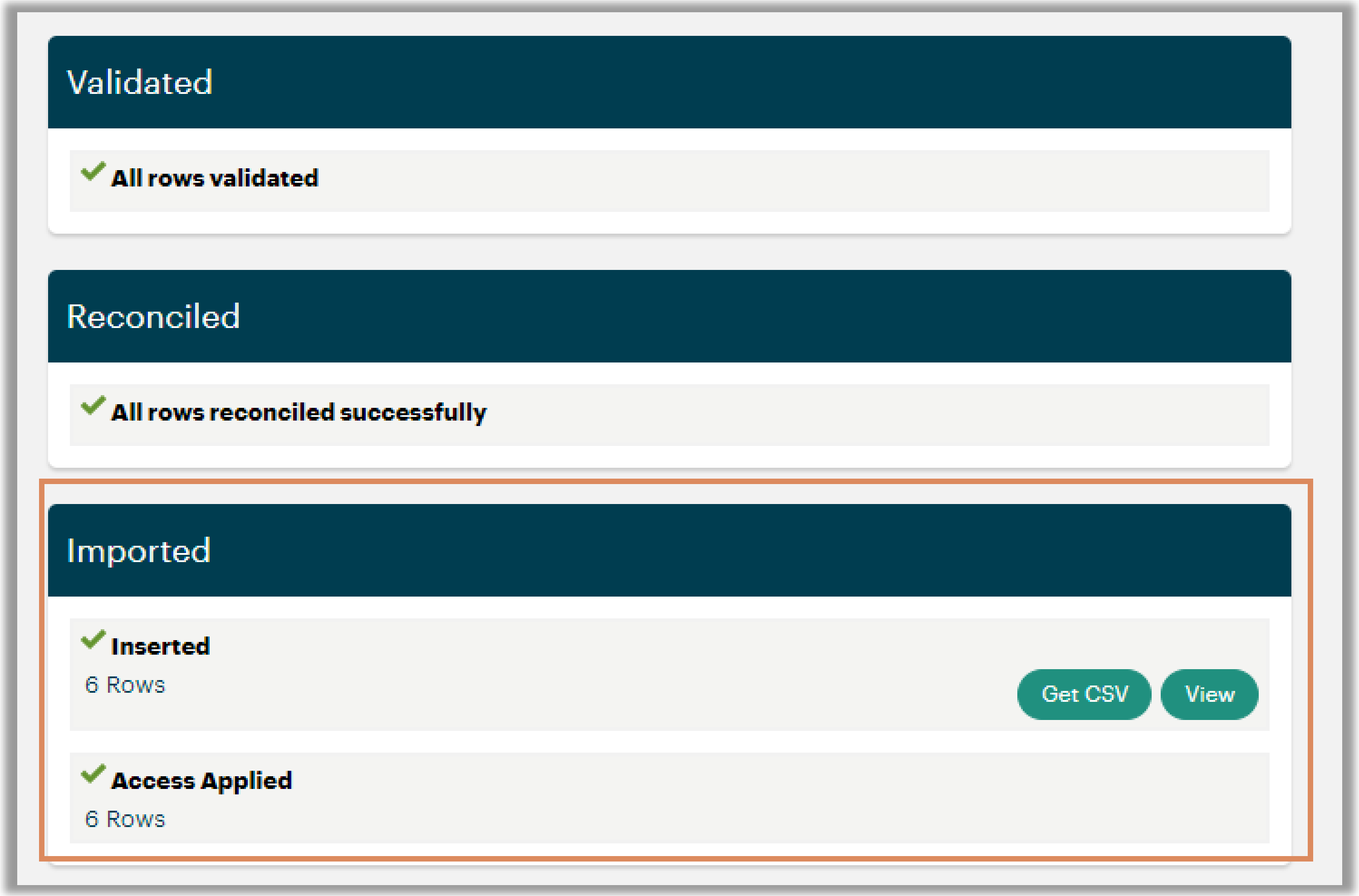
1. Import Tools > Upload Files
2. Select your CSV File
3. Click Upload
4. Assign Access
5. Run All

Bonterra

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

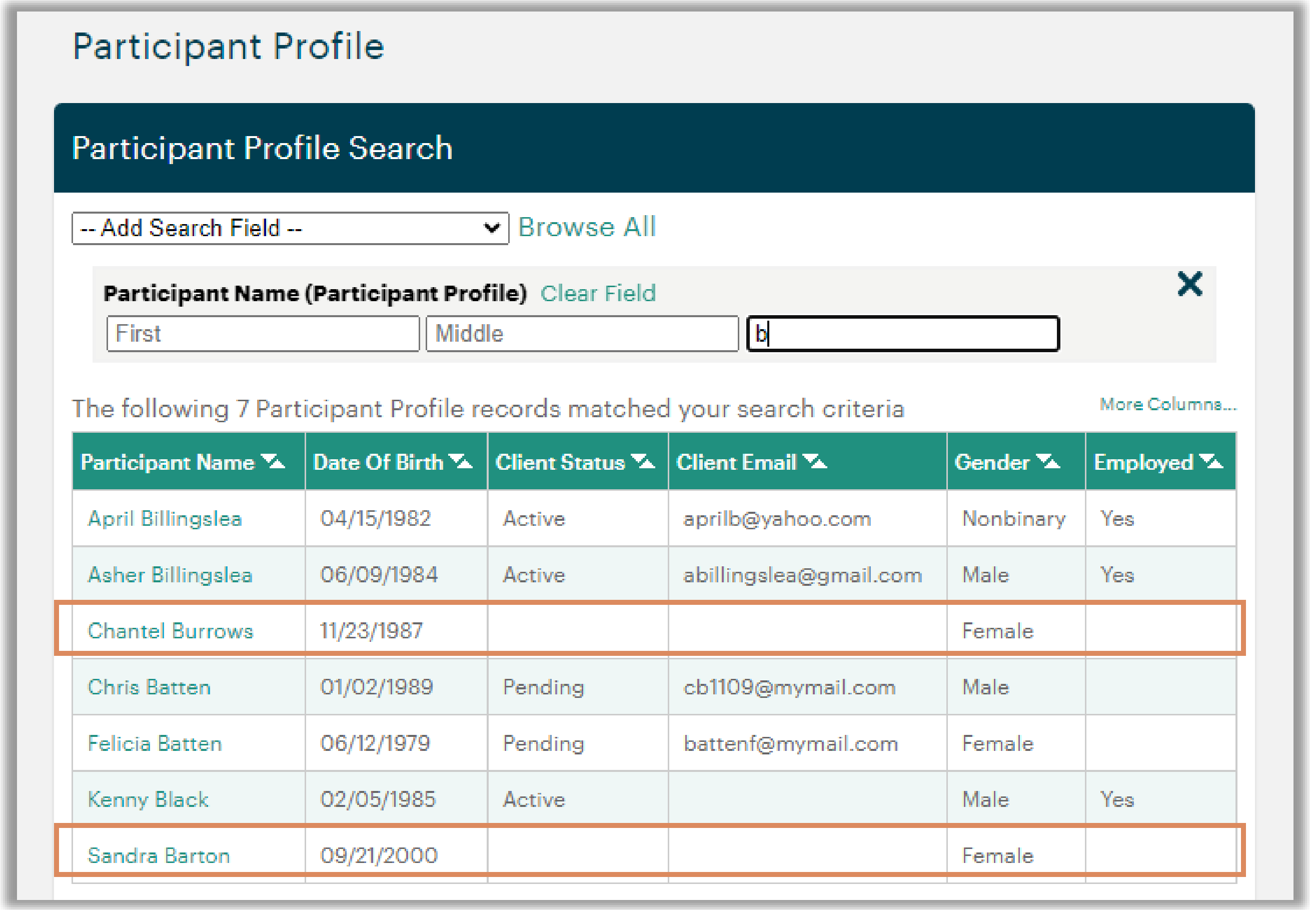


Bonterra

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 | b

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

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.

Bonterra™