

Navigating Apricot with Ease

A New User Webinar

We will begin shortly!



Meet Your Trainer

Megan Dodds

Sr. Training Specialist

clienttrainingrequests@bonterratech.com



Learning Objective

This training will cover:

- Apricot Structure
- Navigating your Apricot
- Accessing the Help Center and when to contact Customer Care.

At the end of this webinar, the goal is for you to be familiar with the structure of Apricot, and to feel comfortable navigating the system.

Agenda

What is Apricot

Apricot's Structure

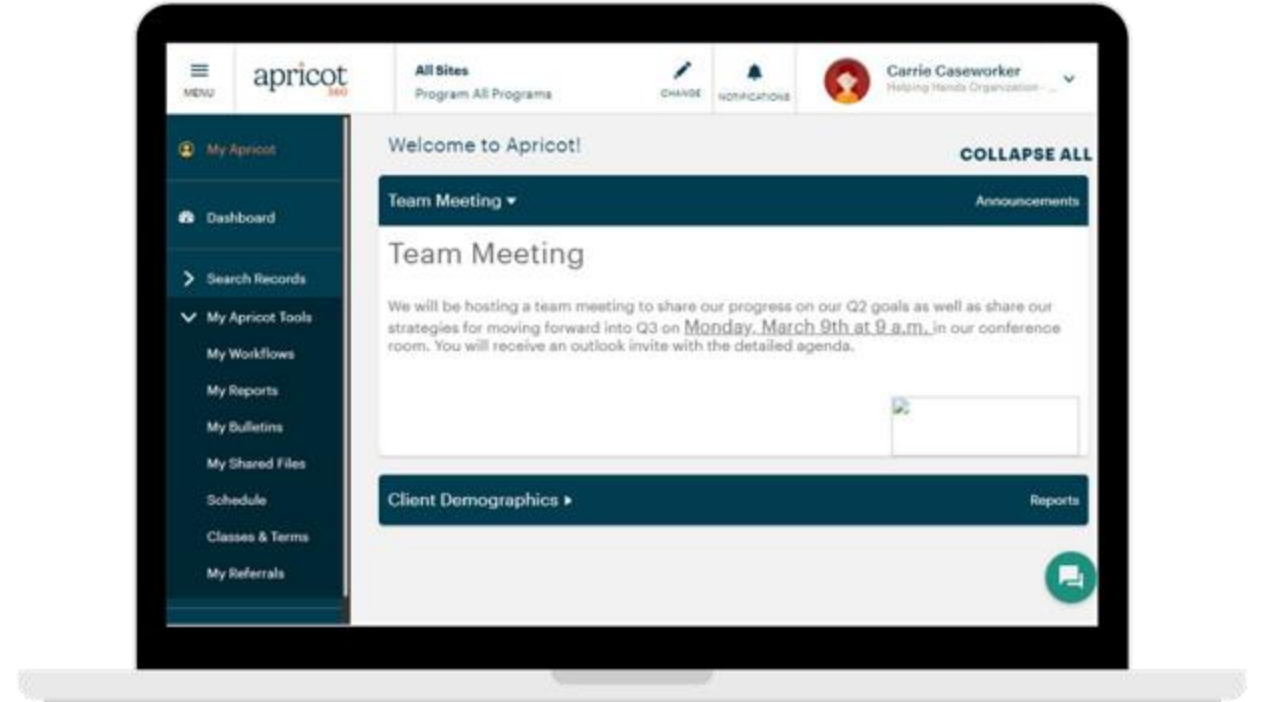
Logging In

Navigation Basics

What is Apricot

What is Apricot?

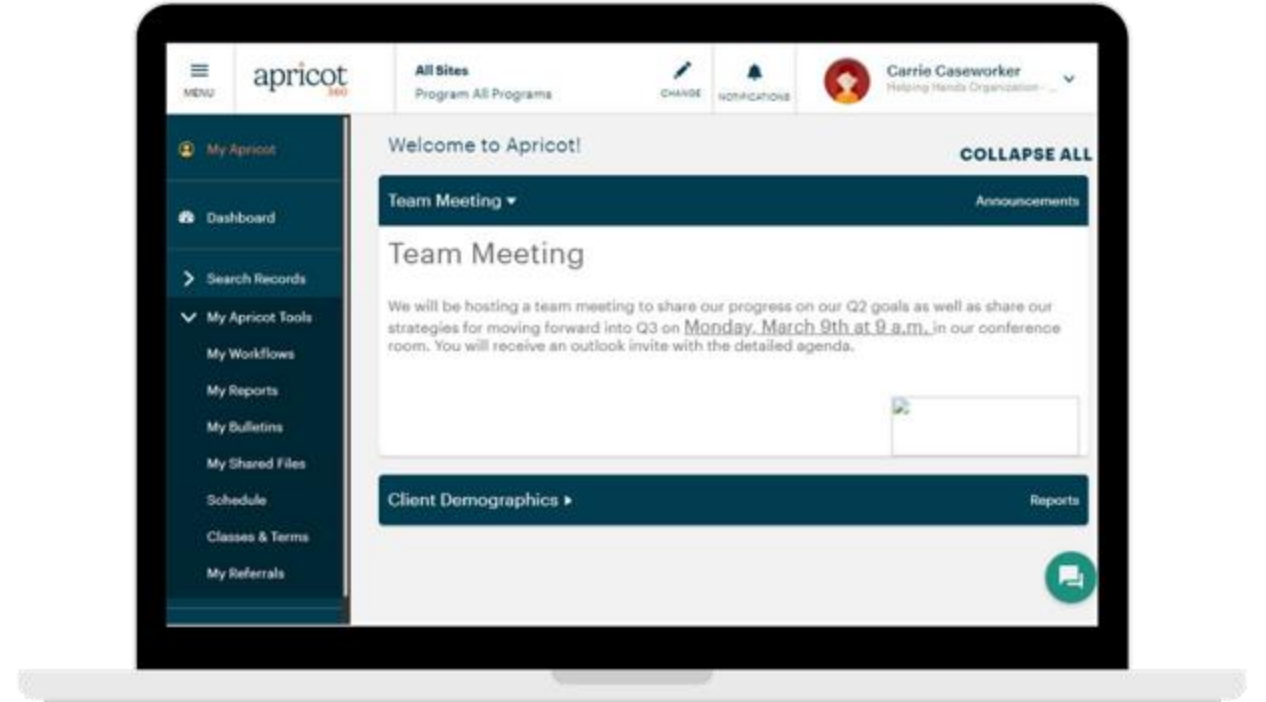
- Cloud based
- Collect information about people and services
- Built in templates steam line data entry
- View reports on your data
- Saves time



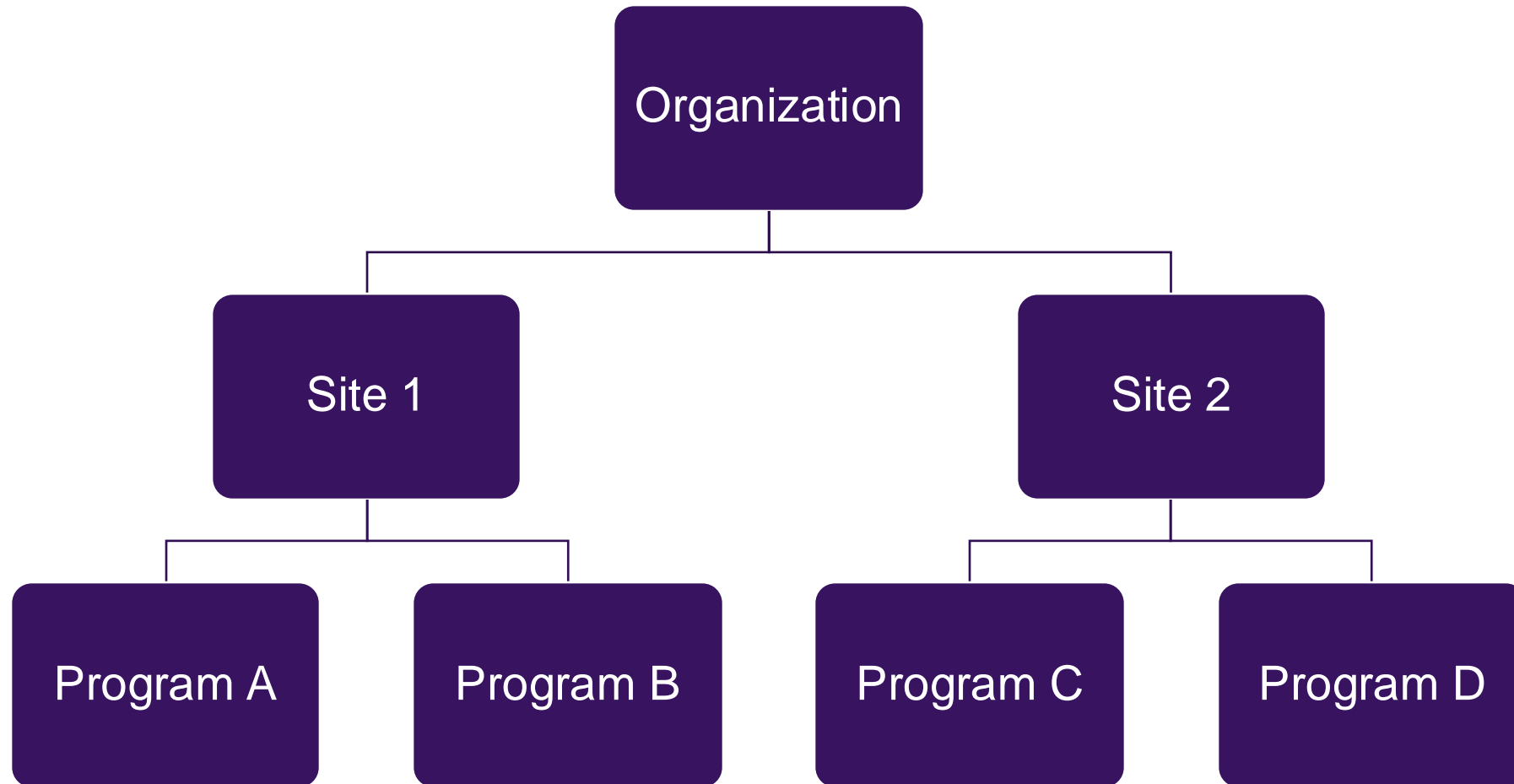
Accessing Apricot

To enter data in Apricot you will need the following:

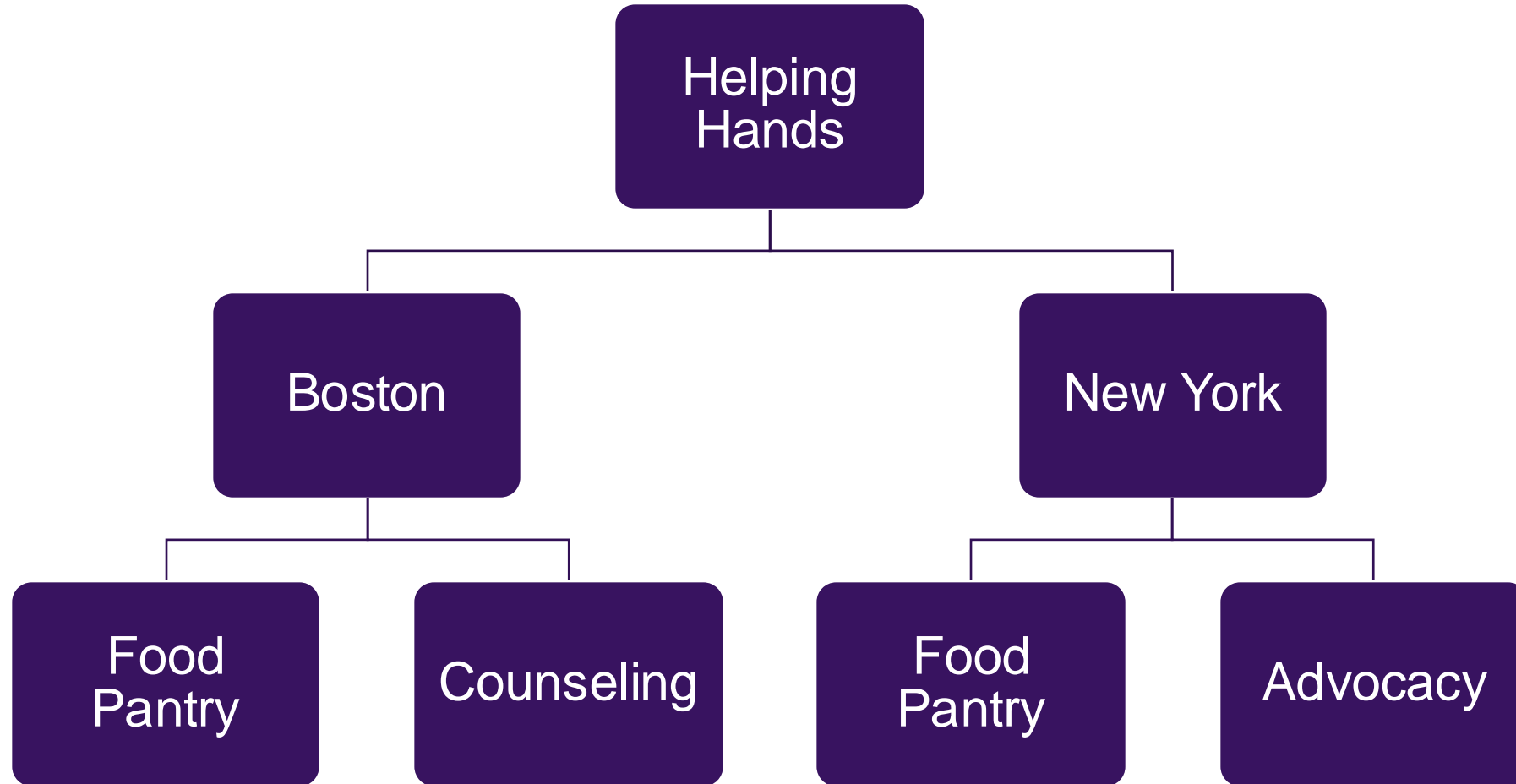
- Reliable Internet Connection
- The most updated version of Google Chrome or Mozilla Firefox
- Apricot username (your email address) and password



Site and Program Structure



Site and Program Structure



Logging In

Logging Into Apricot

1. Navigate to apricot.socialsolutions.com
2. Verify the server/location is correct
3. Enter your email address and password

Save log in page as a favorite.

Use Forgot Password to reset password.

Basic Navigation

Tabs

- My Apricot: User interface
- Administrator: Administrator Interface

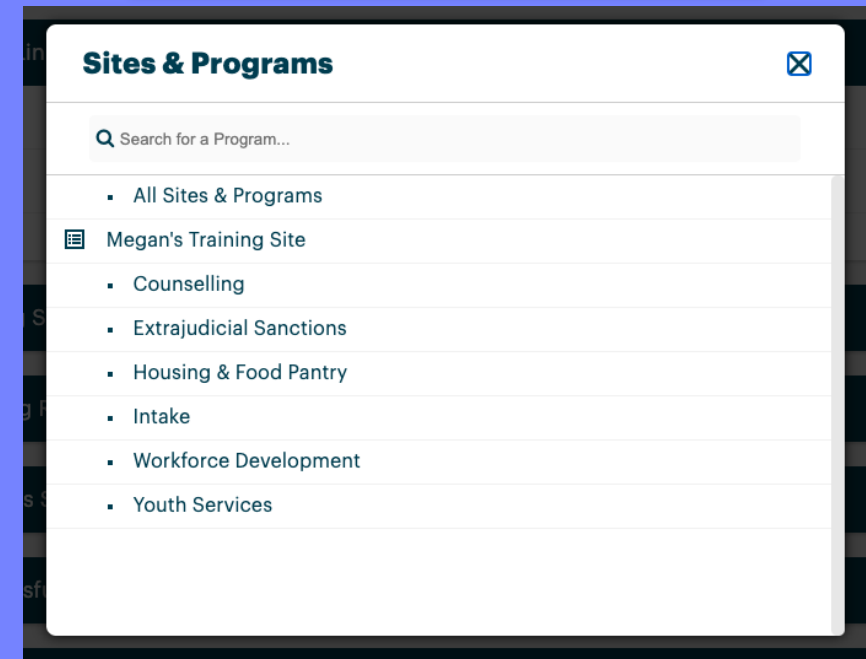
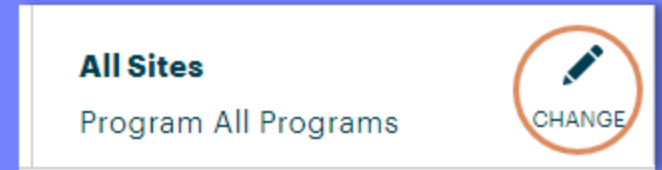
The screenshot shows the top navigation bar of the Apricot 360 Administrator interface. It is divided into several sections: a menu icon labeled 'MENU', the 'apricot 360' logo, a 'MY APRICOT ADMINISTRATOR' tab with a green underline, an 'All Sites Program All Programs' section with a pencil icon and the text 'CHANGE', and a user profile for 'Megan Dodds' with the text 'Megan's Apricot 360 (117741)' and a dropdown arrow.

Site and Program Access

Displays site and program you're logged into.

Click the pencil to:

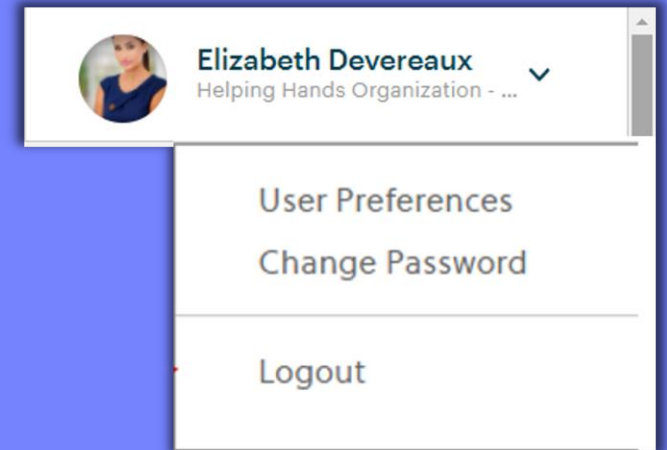
- View a list of your programs
- Navigate to a different program



The User Badge

Click the arrow to the right of your name to access:

- User preferences
- Change password
- Logout



The Bulletins Page

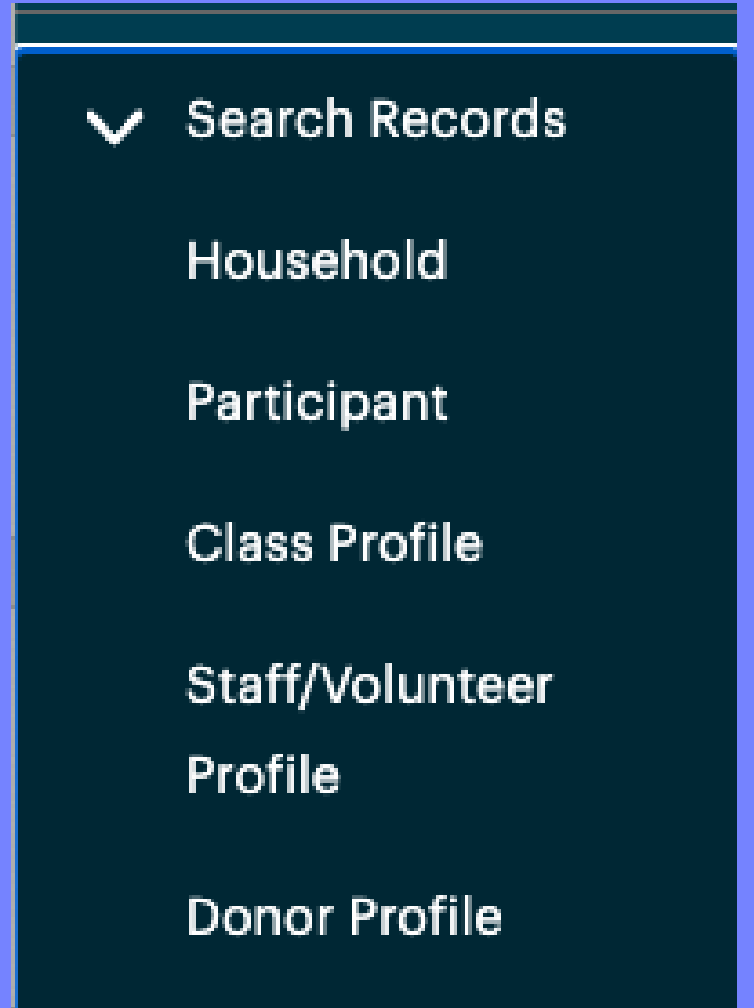
- Notifications
- Reports
- Links, videos and other content

The screenshot displays the 'Apricot Bulletins' page. At the top, there is a header with 'Apricot Bulletins' on the left and 'COLLAPSE ALL' on the right. Below this is a dark teal navigation bar with 'Quick Links' on the left and 'Navigation' on the right. The main content area contains four buttons: 'New Participant', 'Participant Search', 'New Household', and 'Household Search'. Below the buttons is another dark teal navigation bar with 'Getting Started' on the left and 'Training and Resources' on the right. The main content area features the 'apricot' logo, followed by 'Standard Users' and 'Training Academy | Use code "Apricot End User"'. Below that is 'Admin Resources' and 'Adding and Managing Users', with sub-links for 'Form Design | Table of Contents', 'Reporting | Table of Contents', and 'Self Service Tools | Setting up Connect'.

Left Side Palette

Search Records:

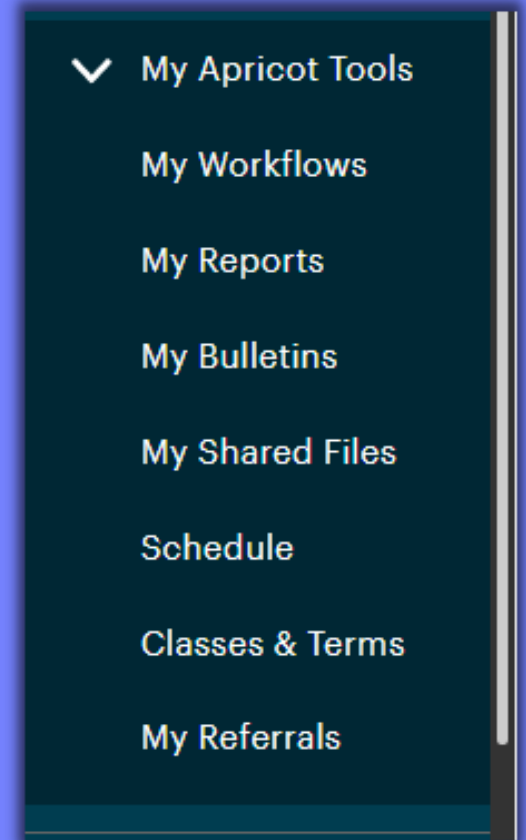
- Tier 1 Forms
- Click a form name to search for records



Left Side Palette

My Apricot Tools:

- My Reports
- My Bulletins
- My Shared Files

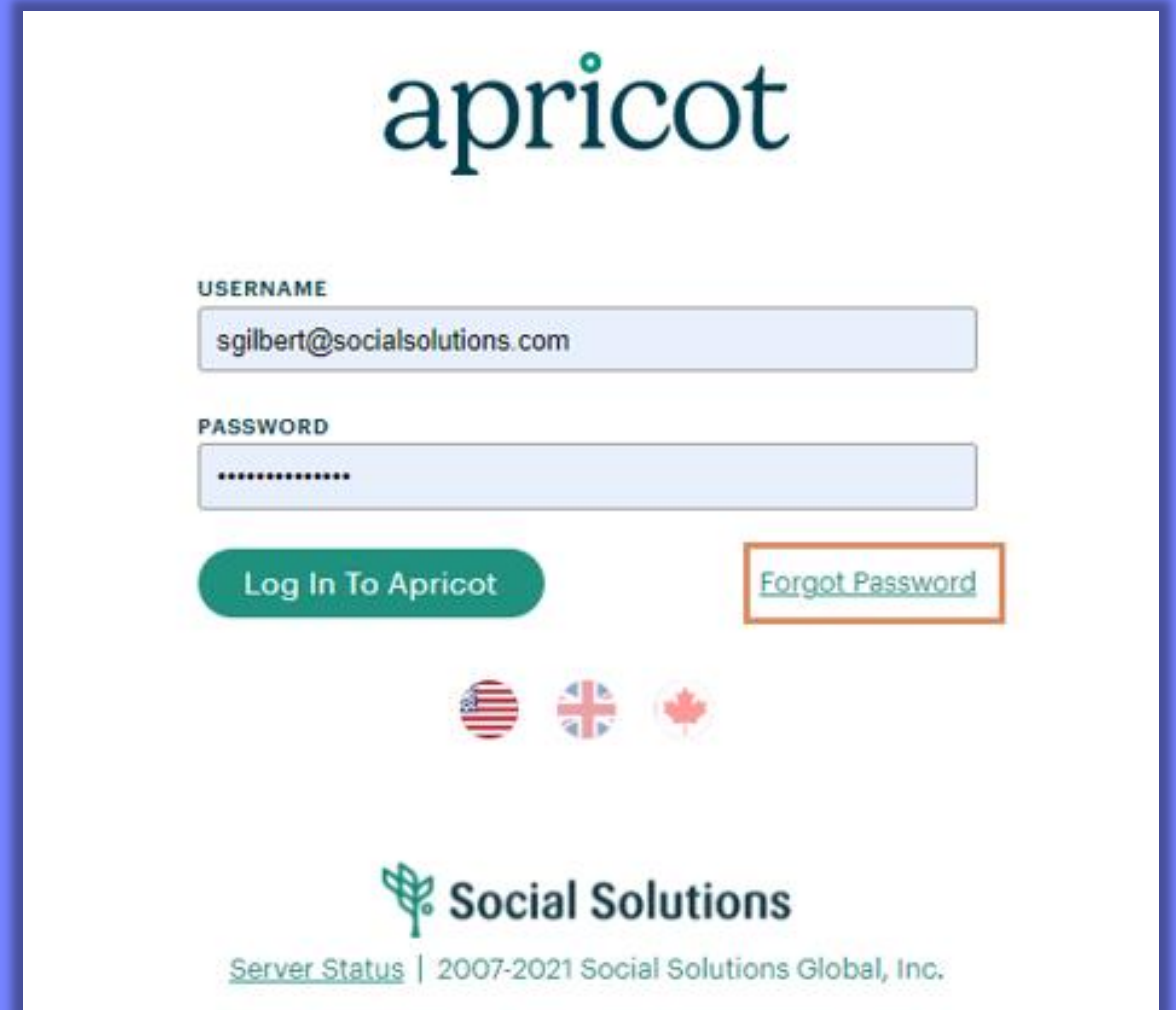


Resources in Apricot

Forgot Password

Use the forgot password link to reset your password via email.

- Administrator can reset your password as well.
- If locked out, must click forgot password to reset.
- Password criteria is set by your Administrator.



The screenshot shows the Apricot login interface. At the top is the 'apricot' logo. Below it are two input fields: 'USERNAME' containing 'sgilbert@socialsolutions.com' and 'PASSWORD' with masked characters. A green 'Log In To Apricot' button is on the left, and a 'Forgot Password' link is on the right, highlighted with an orange border. Below the buttons are three circular icons representing the United States, United Kingdom, and Canada. At the bottom is the 'Social Solutions' logo and footer text: 'Server Status | 2007-2021 Social Solutions Global, Inc.'

Customer Care

Have a question or problem?

Step 1: Contact your Administrator

Step 2: Search the intercom for an answer to your question while waiting to hear back from your Admin.

Step 3: Administrator will submit a support ticket to Apricot Customer Care team for technical issues.



Customer Care

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)

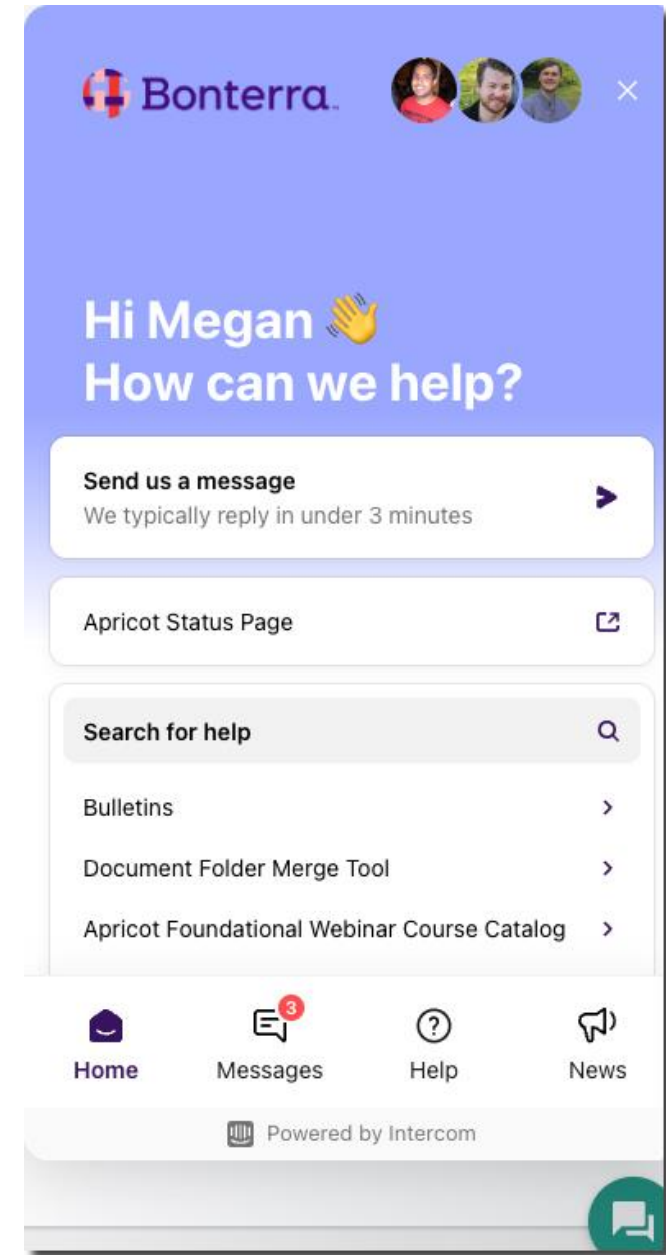


Build confidence & knowledge in
our software!

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.