Working with Entities Webinar

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Meet Your Trainer

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Learning Objective

This session will support users in understanding best practices for adding new Entities in ETO.

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Agenda

Intro

Preventing Duplicates

Adding New Entities

Connecting Entities with Participants

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Intro

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Intro

- Third parties that affect your participants

- Service providers

- Employers

- Referral Sources

Greenmount Help Center's Dashboard

Entity Information

Greenmount Help Center

Type:	Service Providers
Sub-Type:	Housing, Employment, Mental Health, Clothing and Basic Needs
Contact:	456 Greenmount ave
	Baltimore, MD 21218
	(234) 235-4333

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Preventing Duplicates

Preventing Duplicates

Search first

Quick Search

Site level scope

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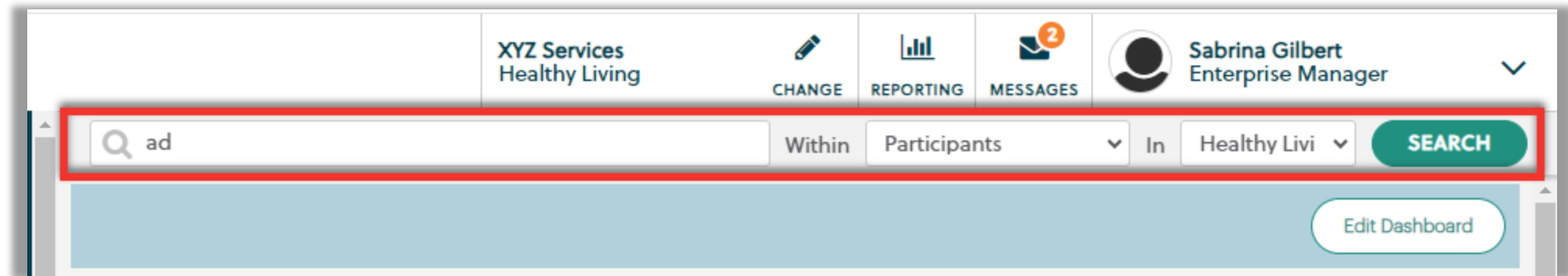
Preventing Duplicates

Both active and inactive

Shows contact name

Click existing record for more details

Preventing Duplicates

Name in results is existing record

Use Enroll Entity feature to make them active in your program

Allows entity to be active in multiple programs simultaneously

Adding New Entities

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Adding a new Entity

Steps:

1. Entity

2. Add New Entity

3. Enter attribute details

4. Click Save

Entity Dashboards in ETO

Automatically created

Contains Action Links

Customized by Admin

Connecting Entities with Participants

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Connecting Entities with Participants

Based on Entity Type

Referral Entity Demographic

Tracking Referral Feature

Field on TouchPoints

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

Build confidence & knowledge in our software!

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Customer Support

Reach out to our Customer Support Team with Questions or Concerns.

Weekdays 7am – 7pm CST via chat or through email: eto@bonterratech.com

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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!

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Thank you for attending!

We hope to see you
in future trainings.

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