

Working with Entities Webinar

Meet Your Trainer

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Learning Objective

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

Agenda

Intro

Preventing Duplicates

Adding New Entities

Connecting Entities with
Participants


Intro

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

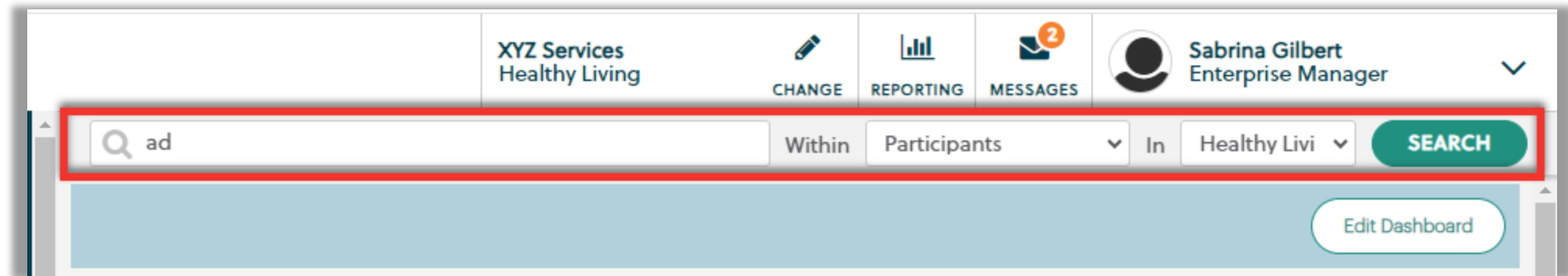
Preventing Duplicates

Preventing Duplicates

Search first

Quick Search

Site level scope



Preventing Duplicates

Both active and inactive

Shows contact name

Click existing record for more details

The screenshot shows a software interface for 'XYZ Services Healthy Living'. The user is 'Sabrina Gilbert Enterprise Manager'. A search bar contains the text 'Service'. The search scope is set to 'Entities' within 'XYZ Services'. The search results are displayed in a table with the following columns: FULLNAME, CONTACTNAME, SHOW ENTITY TYPE, ENTITYSUBTYPE, ENTITYTYPE, and SHOW CONTACT INFO. The results are:

FULLNAME	CONTACTNAME	SHOW ENTITY TYPE	ENTITYSUBTYPE	ENTITYTYPE	SHOW CONTACT INFO
Acme Health Services	Smith	Show Entity Type		Service Providers	Show Contact Info
Dragon House Youth Services	Revian	Show Entity Type	Hospitality	Service Providers Employer	Show Contact Info
Guest Services		Show Entity Type		Service Providers	Show Contact Info
Services - JA		Show Entity Type		Referral Source	Show Contact Info
Whoville Counseling Services		Show Entity Type		Referral Source	Show Contact Info

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

The screenshot shows a software interface for managing entities. On the left is a dark sidebar with a menu. The main area displays a search results page for 'Service' within 'Entities' in the 'XYZ Services' program. The search results are organized into a tree view under 'Entity Subtype'. The 'Health Care' category is expanded, showing a list of entities. The 'Entity Name' dropdown is open, showing 'Hoboken Family Alliance'. A 'Submit' button is visible at the bottom right of the main area.

Entity Subtype
No Subtype
Hospitality
Food Service
Retail
Health Care
Funding Source
Individuals
Referral Source
Religious Organization
Service Providers
Therapy Services
Vendor

Entity Name dropdown:

- Hoboken Family Alliance

Adding New Entities

Adding a new Entity

Steps:

1. Entity
2. Add New Entity
3. Enter attribute details
4. Click Save

The screenshot shows the Bonterra system interface for adding a new entity. The left sidebar is dark blue with white text. The main content area is white with a search bar at the top. The 'Add Entity' form is displayed, with a red circle 3 highlighting the 'Entity Name' field. The form includes fields for Entity Name, Entity Type, Entity Subtype, Address 1, Address 2, Zip Code, and Phone Number. The 'Entity Name' field contains the text 'City Harvest Brooklyn'. The 'Entity Type' field has two selected options: 'Referral Source' and 'Service Providers'. The 'Entity Subtype' field has one selected option: '[Referral Source] Non Profit Organization'. The 'Address 1' and 'Address 2' fields are empty. The 'Zip Code' and 'Phone Number' fields are also empty.

1 Entities

- Add Attribute by Group
- Find Entity
- Find Entity (Legacy)

2 Add New Entity

- Add New Entity (Legacy)
- View/Edit Entity
- View/Edit Entity (Legacy)
- Manage Entities
- Enroll Entity
- Dismiss Entity
- Manage Program Entities
- Review Entity Efforts

Service

3 Add Entity

Entity Information | Contacts

Entity Name *
City Harvest Brooklyn

Entity Type *
Referral Source × Service Providers ×

Entity Subtype
[Referral Source] Non Profit Organization ×

Address 1

Address 2

Zip Code

Phone Number

Entity Dashboards in ETO

- Automatically created
- Contains Action Links
- Customized by Admin

The screenshot displays a dashboard titled "Acme Health Services's Dashboard" with an "Edit Dashboard" button in the top right corner. The dashboard is divided into three main sections:

- Entity Information:** This section features a card for "Acme Health Services" with a mobile phone icon. It lists the following details:
 - Type:** Service Providers
 - Contact:** 425 Main st, Columbus, OH 43201, (614) 555-5555A link labeled "View/Edit Entity" is positioned below the contact information.
- Recent TouchPoints:** This section has a clipboard icon and is titled "Acme Health Services's Recent TouchPoints". It contains the text "There are no recent TouchPoints for this entity." and a "+ New" button.
- Recent Entities:** This section has a mobile phone icon and is titled "Recent Entities". It displays a table with one entry:

Name
Hoboken Family Alliance

Connecting Entities with Participants

Connecting Entities with Participants

- Based on Entity Type
- Referral Entity Demographic
- Tracking Referral Feature
- Field on TouchPoints

Dismiss Participants from Healthy Living

Search for Participants in XYZ Services by last name and/or first name, Social Security Number, case number, or family name. To see **all Participants** leave the boxes empty.
1. Enter search criteria. 2. Select participant(s) to dismiss. 3. Enter dismissal information; if multiple participants are selected with different dates, finish on the following page.

Last Name:

First Name:

or

SSN:

or

Case Number:

or

Family Name:

Below are all Participants who are currently enrolled in Healthy Living with last name like 'fab'.

<input type="checkbox"/>	PARTICIPANT	AGE	CASE NUMBER
<input checked="" type="checkbox"/>	Benny Fabian		10653
<input type="checkbox"/>	Nick Fabian	18	11590

Page size: 2 items in 1 pages

Program End Date:

Dismissal Reason:

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!

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

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.