

Setting Up Participant Portal Connect & Engage with Key Audiences

Welcome, we will start shortly!



Meet Your Trainer

Annie Novacek

Sr. Training Specialist

ClientTrainingRequests@BonterraTech.com



Learning Objective

By the end of this session, our goals for you are to:

- Understand the benefits of a portal and messaging for your audiences.
- Feel confident enabling Connect to engage with your Participants.
- Consider use cases to apply this feature for your organization.

Agenda

Connect Overview

Participant Experience

How to Configure

Direct Messaging

Connect Overview

Connect Overview

- Portal & Messaging feature
- Specific access to only one's own data
- Available with Pro (Core) & Enterprise (360)
- Mobile friendly & easy access

Example Use Cases:

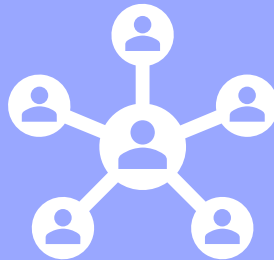
- Participants
- Households
- Volunteers
- Partners

The screenshot displays the Bonterra Connect user interface. At the top, the header includes the Bonterra logo and the text 'Bonterra | Connect'. On the right side of the header, the user's profile is shown as 'Annie Volunteer Participant'. Below the header, a dark teal sidebar menu contains options for 'Dashboard', 'Form Submissions', and 'ALL ASSIGNED FORMS'. Under 'ALL ASSIGNED FORMS', there is a dropdown menu for 'Empowering Families' with sub-items: 'Background Check', 'Volunteer Timesheet', and 'Photo Release Form'. The main content area features a welcome message 'Welcome, Annie!' and a 'View' dropdown menu set to 'All Locations'. Below this, a section titled 'Available Forms' shows three cards, each labeled 'AVAILABLE' and containing a 'FILL OUT' button. The cards are for 'Background Check', 'Volunteer Timesheet', and 'Photo Release Form', all associated with 'Apricot Training - Empowering Families'. A 'VIEW FORM SUBMISSIONS' button is located in the top right of the forms section. The footer contains copyright information '© 2024 Bonterra' and links to 'Terms of Service' and 'Privacy Policy', along with the Bonterra logo.

Connect Benefits



Empower
Participants



Connect
Remotely



Save Staff
Time



Maintain
Engagement



Participant Experience

User Experience: Login

The image displays two views of the Bonterra user interface. On the left is the login page, and on the right is the dashboard.

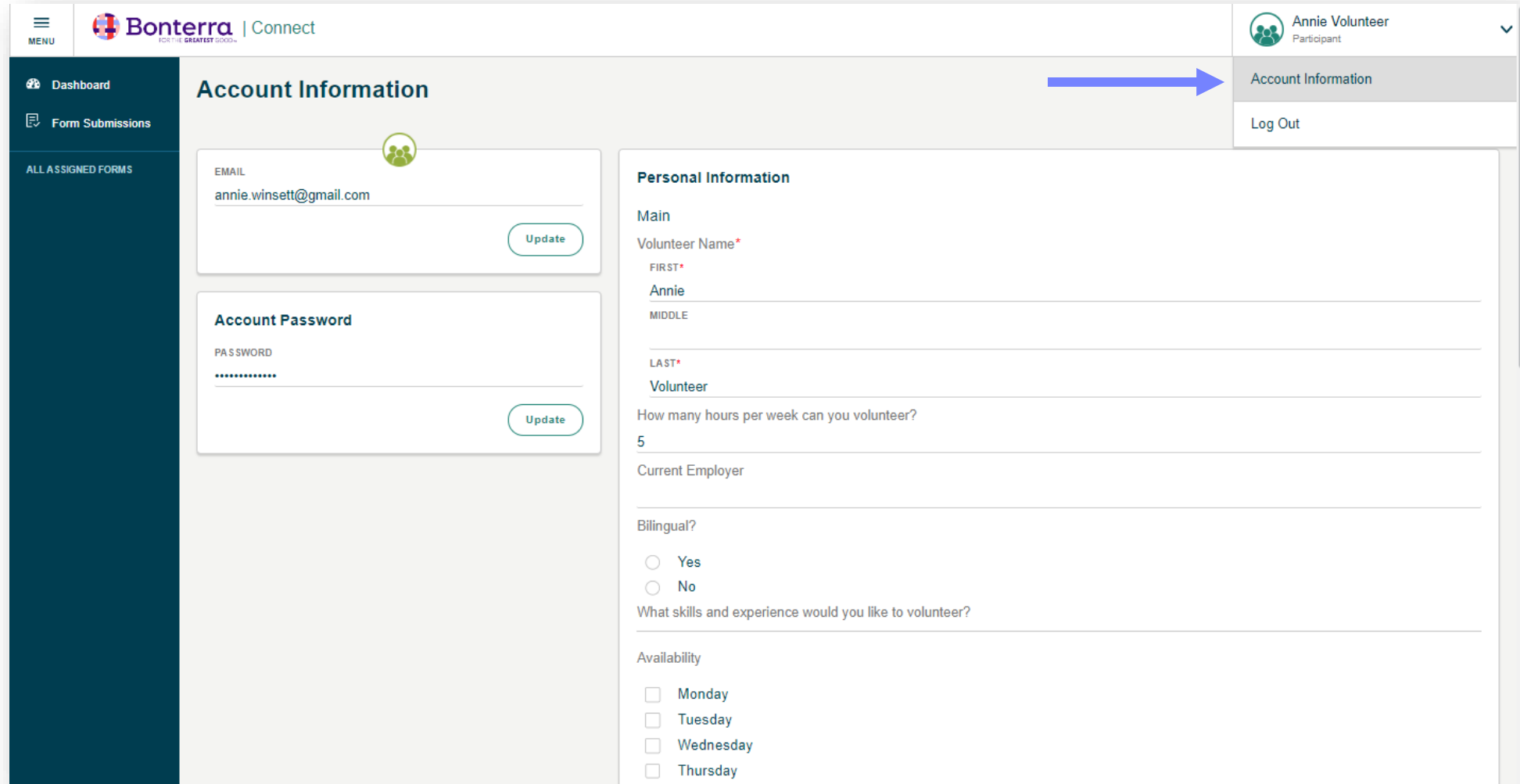
Login Page:

- Logo: **Bonterra** FOR THE GREATEST GOOD™
- Form fields: EMAIL and PASSWORD
- Buttons: **Log In** and [Forgot My Password](#)
- Footer: © 2024 Bonterra | [Terms of Service](#) | [Privacy Policy](#)

Dashboard (Connect):

- Header: **Welcome to Connect!**
- User Profile: Kelly Johnson, Participant
- Navigation: Dashboard, Form Submissions
- Section: **Available Forms** (11)
- Form Cards:
 - EXPIRES 06/12/2018**: Goodwill Intake (Social Good Org - Employment & Career Services)
 - EXPIRES 07/23/2018**: Employment Placement (Social Good Org - Employment & Career Services)
 - STANDARD**: Resource Room/Open Lab Sign-In (Social Good Org - Employment & Career Services)
 - STANDARD**: Barriers Assessment (Social Good Org - Employment & Career Services)
 - STANDARD**: SIMS Foundation Mental Health (Social Good Org - Employment & Career Services)
 - STANDARD**: 1-Year Follow-Up (Social Good Org - Employment & Career Services)
- Buttons: **Fill Out Form** (on each card), **Show More**, [View Form Submissions](#)

User Experience: Account Information



Bonterra | Connect

MENU

Dashboard

Form Submissions

ALL ASSIGNED FORMS

Account Information

EMAIL
annie.winsett@gmail.com
Update

Account Password

PASSWORD
.....
Update

Personal Information

Main

Volunteer Name*

FIRST*
Annie

MIDDLE

LAST*
Volunteer

How many hours per week can you volunteer?
5

Current Employer

Bilingual?

Yes
 No

What skills and experience would you like to volunteer?

Availability

Monday
 Tuesday
 Wednesday
 Thursday

Annie Volunteer
Participant

Account Information

Log Out

User Experience: Forms

The image displays a user interface for Bonterra Connect. The main dashboard area shows a welcome message for Annie and a list of available forms under the heading "Available Forms 2". Two forms are listed: "Volunteer Timesheet" and "Photo Release Form", both associated with "Apricot Training - Empowering Families". Each form has a "FILL OUT" button. A blue arrow points from the "Volunteer Timesheet" card to a detailed view of the form on the right.

Volunteer Timesheet *Required

Main

Date*
8/21/2024

Volunteer activity*
-- Select --

Hours served*

Notes

© 2024 Bonterra | [Terms of Service](#) | [Privacy Policy](#)

Bonterra

How to Configure

How to Configure

Step 1: Customize Settings.

Step 2: Create Participant Types.

Step 3: Set Form Permissions.

Step 4: Register Participants.



How to Configure

Step 1: Customize Settings.

Administrator > Connect > Settings

- Update Branding
 - Upload a Logo
 - Customize Portal URL
- Update “From” Email Addresses

The screenshot displays the Bonterra Settings interface. On the left is a dark teal sidebar with navigation options: Dashboard, Inventory, Form Designer, Report Center, Record Manager, Access Control, Workflow Station, External Access, SSG Admin, Connect (expanded), Participants, Settings (highlighted in orange), Direct Messages, Customer Care, and Help Center. The main content area is titled 'Settings' and contains three sections:

- Upload Logo:** Shows the current logo as 'Bonterra.' with a recommended size of 225 x 40 pixels. It includes buttons for 'SELECT FILE', 'RESET TO DEFAULT', and 'UPLOAD'.
- Participant's View URL:** Displays the URL <https://apricottraining.socialsolutionsportal.com/> with buttons for 'COPY URL' and 'CUSTOMIZE URL'.
- Connect "From" Email Addresses:** Shows a list with one entry: 'Social Solutions Connect' with email 'no-reply@socialsolutions...' and a radio button selected for 'Use As Default'. A green checkmark indicates it is 'Verified!'. There is an 'ADD EMAIL ADDRESS' button with a plus icon.

At the bottom of the email address section, a note states: 'Add up to 3 email addresses. Email addresses must be verified before they're available for use.'

How to Configure

Step 2: Create Participant Types.

Administrator > Connect > Participants

- Create Participant groups based on Tier 1s
- Use descriptive name for each type
- Aim for distinct group types (no overlap)

Limitations:

- Cannot change Tier 1 once created
- Types cannot be deleted or archived

The screenshot displays the Apricot 360 Administrator interface. The top navigation bar includes the Apricot 360 logo, the user name 'MY APRICOT ADMINISTRATOR', and the site selection 'All Sites Program All Programs'. A dark sidebar on the left contains a menu with options: Dashboard, Form Designer, Report Center, Record Manager, Access Control, Workflow Station, External Access, SSG Admin, Connect (expanded), Participants (highlighted), Settings, and Direct Messages. The main content area is titled 'Participants' and shows 'Total Enabled: 6'. It features four cards representing different participant types, each with a 'VIEW' button and a status indicator for 'REGISTERED' and 'ENABLED' counts.

Participant Type	Tier 1	Registered	Enabled
Clients	Students	0	0
Fellows	Fellow Profile and VITALS	0	0
Participants	Participant Profile	1	1
Test	Intake form field test	0	0

How to Configure

Step 3: Set Form Permissions.

Administrator > Connect > Participants

- Settings customized by Participant Type
- Grant View / Edit access for Tier 1 individual fields (Account Information)
- Enable View / Create / Edit access for entire Tier 2 forms by Program

< BACK Volunteers - Permissions

PERSONAL INFO **FORM PERMISSIONS**

Select the Tier 2 for which you'd like to set permissions. **NOTE:** Permissions for Tier 2 forms are set per program.

AVAILABLE FORMS FORM ALIAS (OPTIONAL)

Volunteer Timesheet

SEARCH Search...

	READ	CREATE	EDIT
Advocacy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Better Homes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Counseling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Empowering Families	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SAVE

How to Configure

Step 4: Register Participants.

Administrator > Connect > Participants

- Select records under chosen Tier 1 to enable
- Can search & filter by Program
- Option to customize the email invite language
- Can disable or archive to remove access

Limitations:

- Participants must have unique email address
- Can only be enabled in one type at a time
- Must be over 13 to access Connect

Workforce Participants
Enabled: 0

REGISTERED 0 UNREGISTERED 38

An email with a password setup link will be sent to all enabled participants. [Add some custom email language](#)

Restrict list to participants updated within the last year.

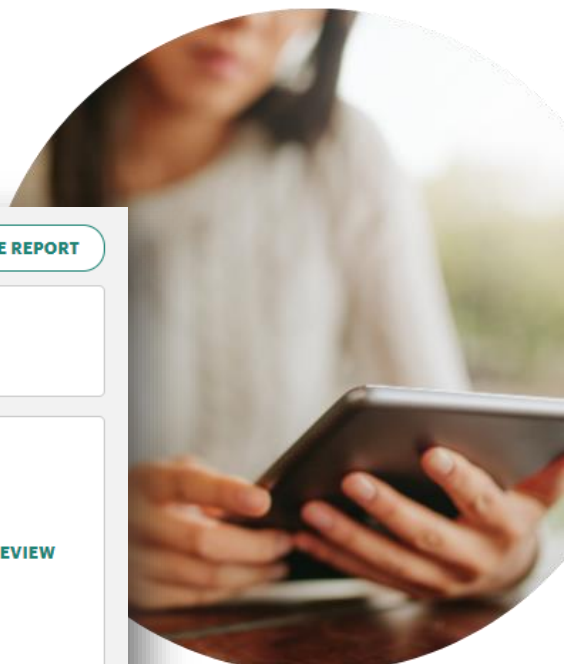
Create Account (3) Search... All Sites All Programs SEARCH

<input type="checkbox"/>	FIRST NAME ↓↑	LAST NAME ↕	EMAIL ↕	MODIFIED DATE ↕
<input checked="" type="checkbox"/>	Alicia	Henry		08/20/2024
<input checked="" type="checkbox"/>	Alonzo	LaBarca		08/16/2024
<input checked="" type="checkbox"/>	Alonzo	LaBatsille		08/15/2024
<input type="checkbox"/>	Alvy	Singer	alvy.singer@gmail.com	08/20/2024
<input type="checkbox"/>	Andrew	Jones		08/16/2024
<input type="checkbox"/>	April	Billingslea	aprilb@yahoo.com	08/16/2024
<input type="checkbox"/>	Asher	Billingslea	abillingslea@gmail.com	08/15/2024

Direct Messaging

Direct Messaging

- Send text or email via Apricot
- One way communication
- Include link to form to complete
- Plain text, but can add attachment
- Track opens & form completions



< Direct Message Details CREATE REPORT

MESSAGE TITLE
Photo Release

Message

FROM	no-reply@socialsolutions.com	FORM LINKED	Photo Release Form	PREVIEW
EMAIL SUBJECT	Please Complete Photo Release	PROGRAM ASSIGNMENT	Empowering Families	

EMAIL MESSAGE
Please complete our annual photo release form before your first volunteer shift. Thanks!

Recipients (1) ✓ SENT ! FAILED 🚫 OPTED-OUT View ⋮

FIRST NAME ↕	LAST NAME ↓↑	EMAIL ADDRESS ↕		RESPONSE STATUS
Annie	Volunteer	annie.winsett@gmail.com	✓	Opened

View ▾

Direct Messaging

Step 1: Select Participant Type.

Step 2: Select Recipients.

Step 3: Compose Message.

Step 4: Review & Send.

Step 5: Track Responses.

apricot 360 MY APRICOT ADMINISTRATOR All Sites Program All Programs CHANGE Annie Novacek Adv Webinar Demo... (118248)

Edit Direct Message

1 Message Setup > 2 Select Recipients > 3 **Compose Message** > 4 Review & Send

MESSAGE TITLE
New Message

Compose Message

FROM*
no-reply@socialsolutions.com

REPLY TO
[Empty field]

EMAIL SUBJECT*
[Empty field]

EMAIL MESSAGE*
[Empty text area]

TEXT MESSAGE*
[Empty text area]

FORM LINKED
Volunteer Timesheet **PREVIEW**

PROGRAM ASSIGNMENT*
-- Select --

FORM LINK EXPIRATION DATE
mm/dd/yyyy

ATTACH FILE(S) TO THIS MESSAGE...
SELECT FILE

Customer Care
Help Center

BACK **SAVE & EXIT** **NEXT**

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)

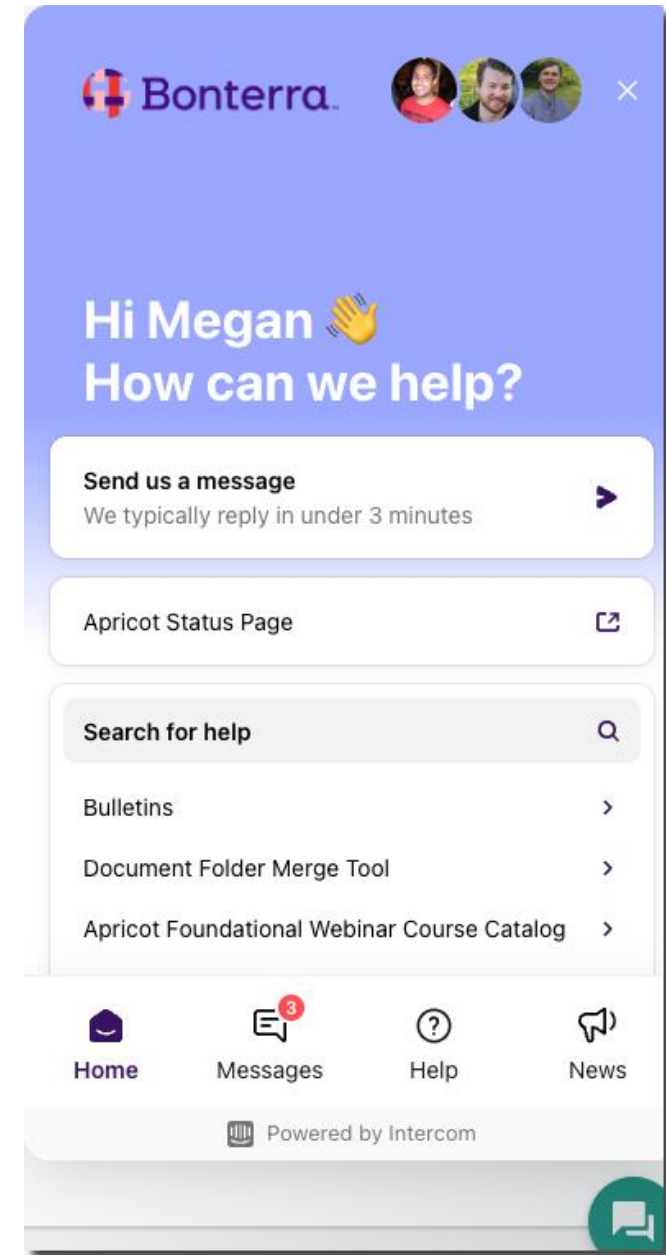


Build confidence & knowledge in
our software!

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.