Setting Up Participant Portal

Connect & Engage with Key Audiences

Welcome, we will start shortly!

Bonterra™

Meet Your Trainer

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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

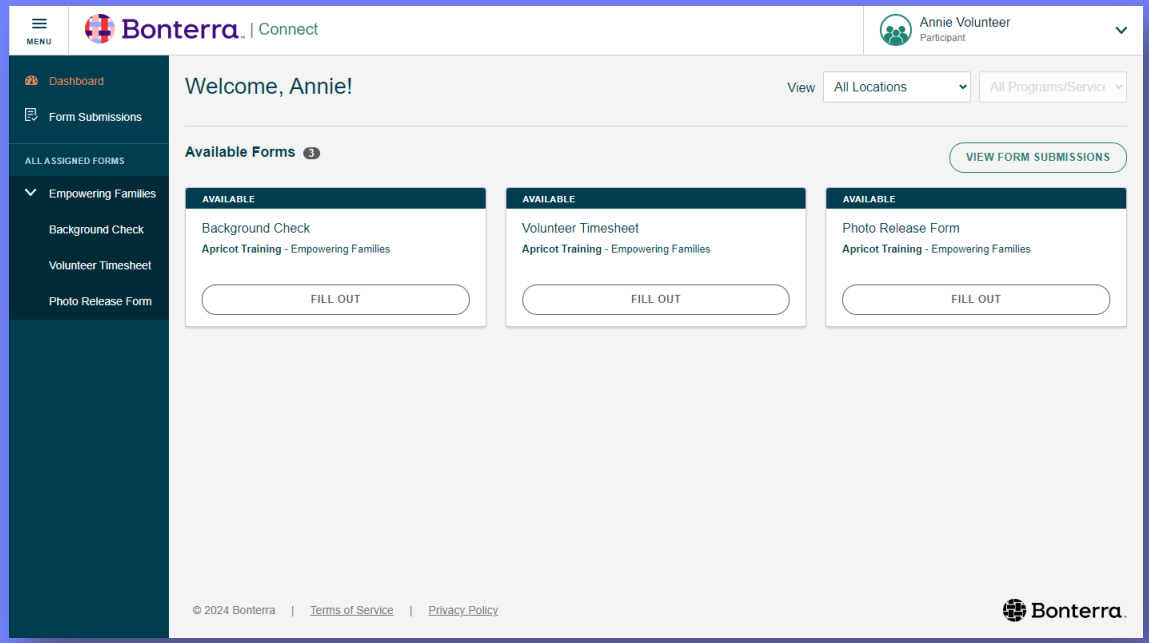
Connect Overview

Connect Overview

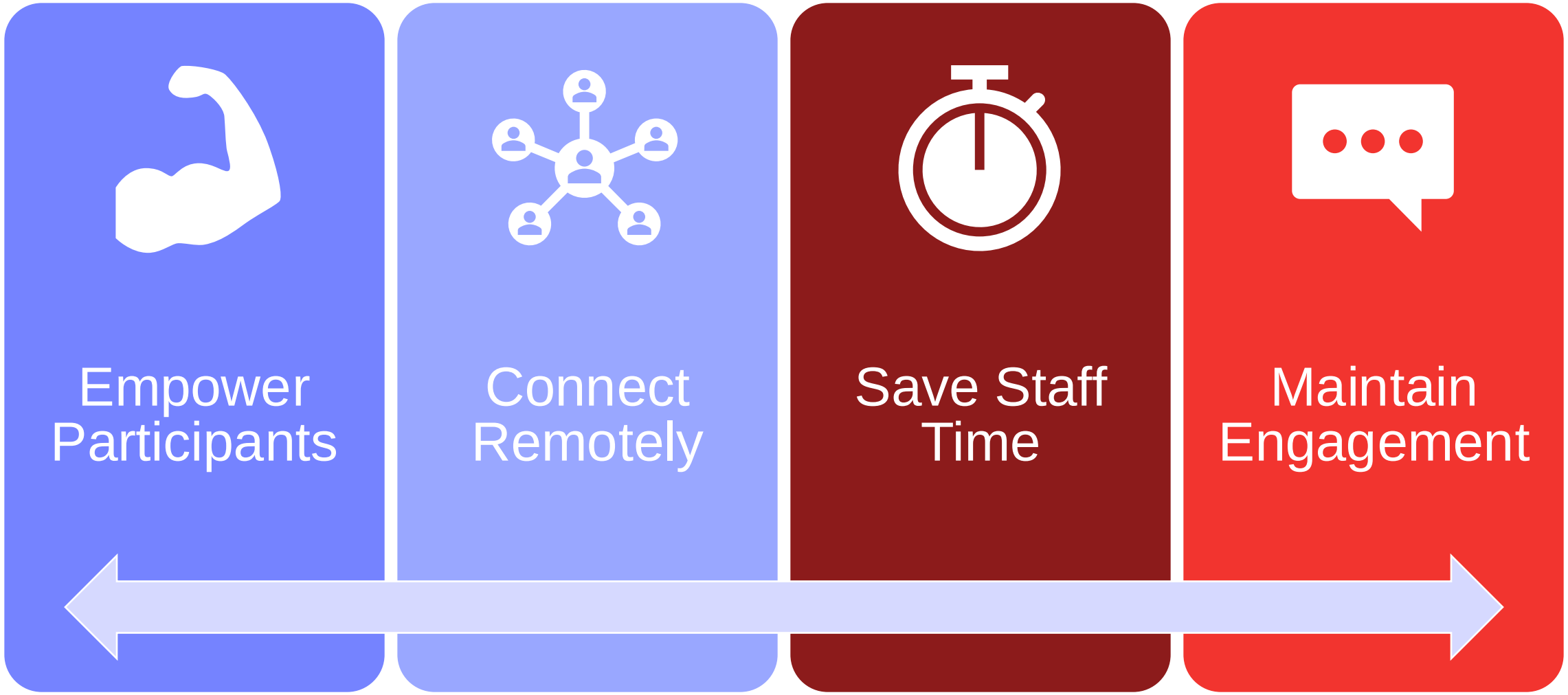
- Portal & Messaging feature
- Specific access to only one's own data
- Available with Pro (Core) & Enterprise (360)
- Mobile friendly & easy access

Example Use Cases:

- Participants
- Households
- Volunteers
- Partners

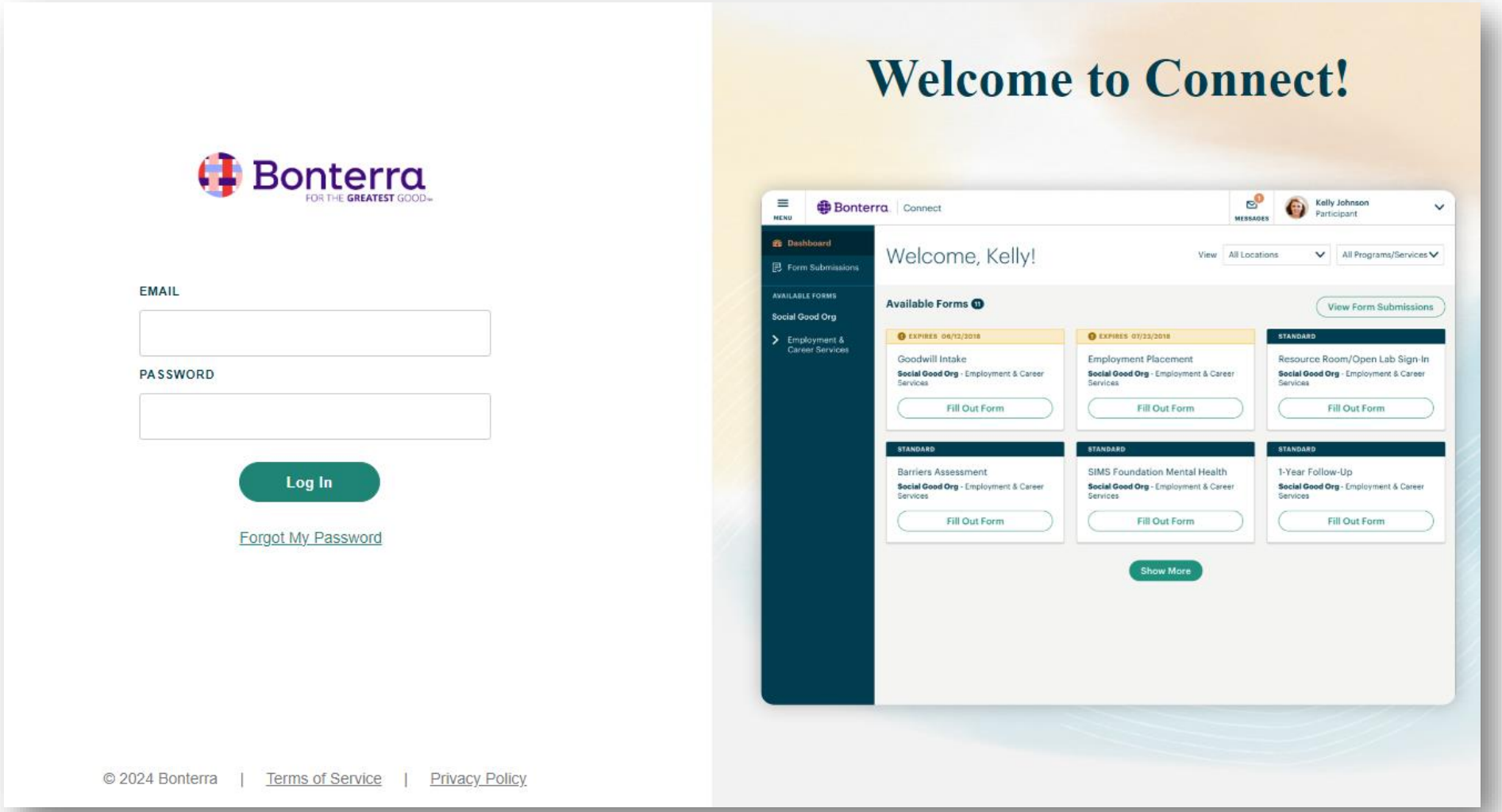


Connect Benefits

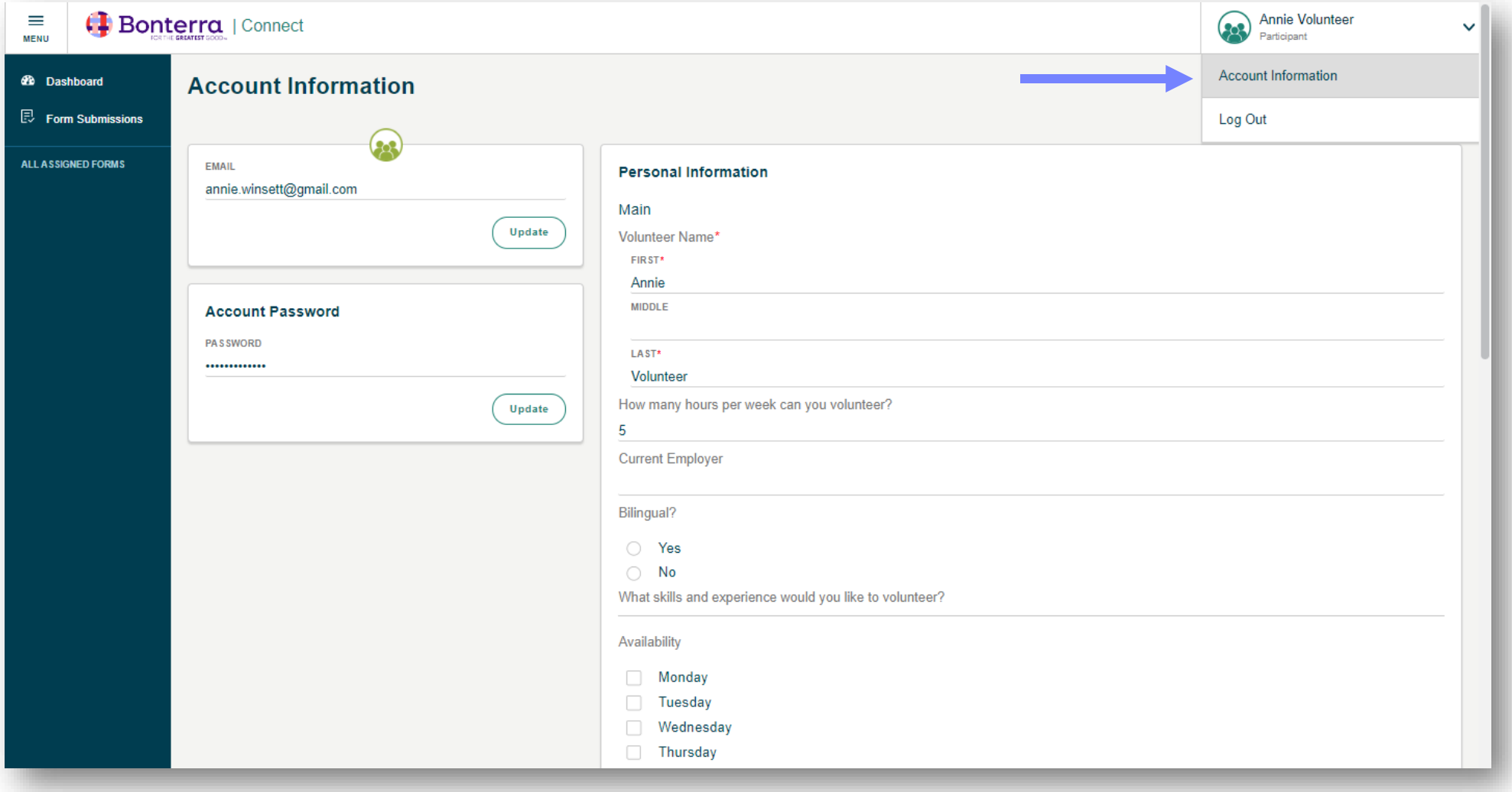


Participant Experience

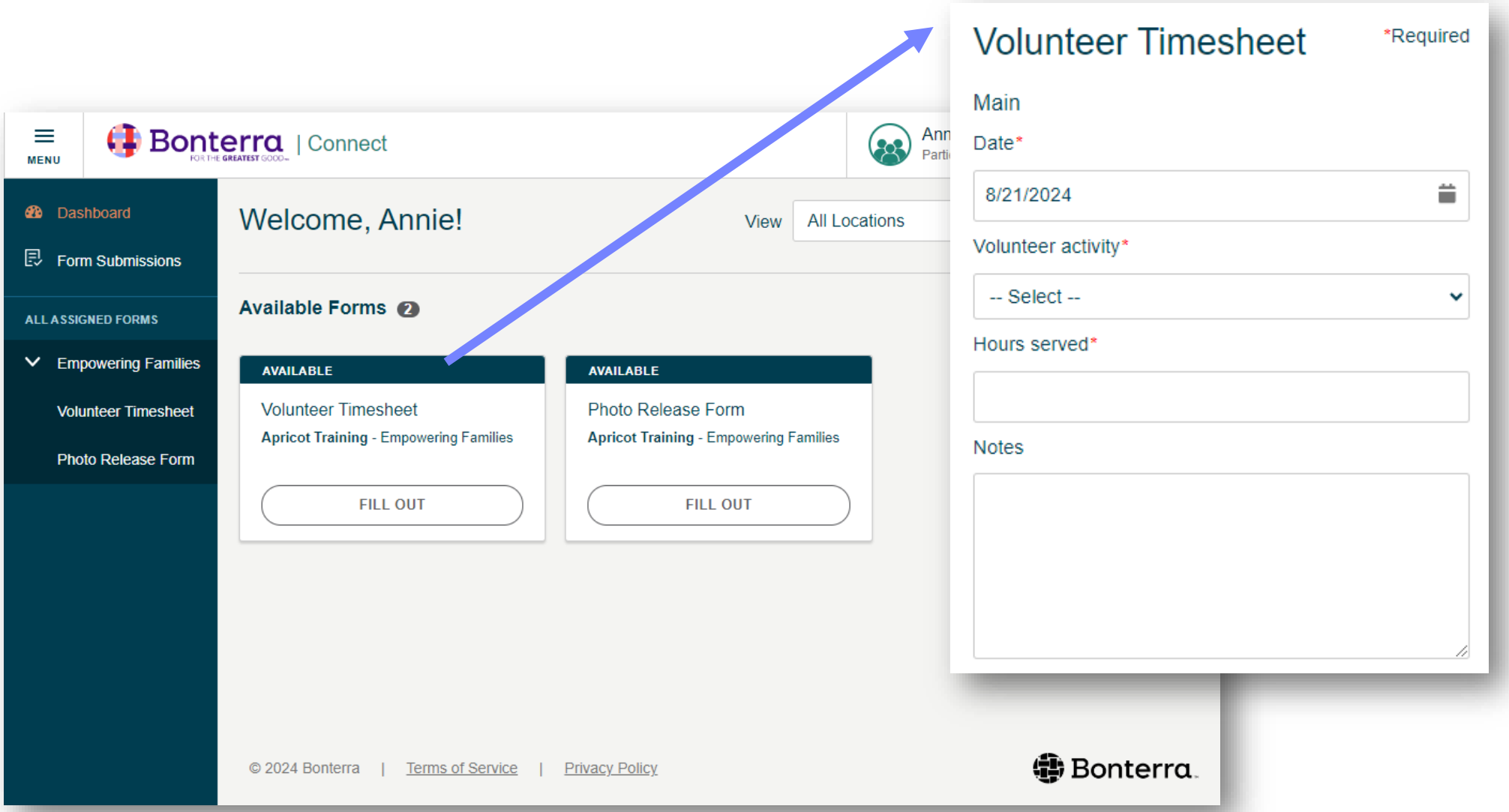
User Experience: Login



User Experience: Account Information



User Experience: Forms



How to Configure

How to Configure

Step 1: Customize Settings.

Step 2: Create Participant Types.

Step 3: Set Form Permissions.

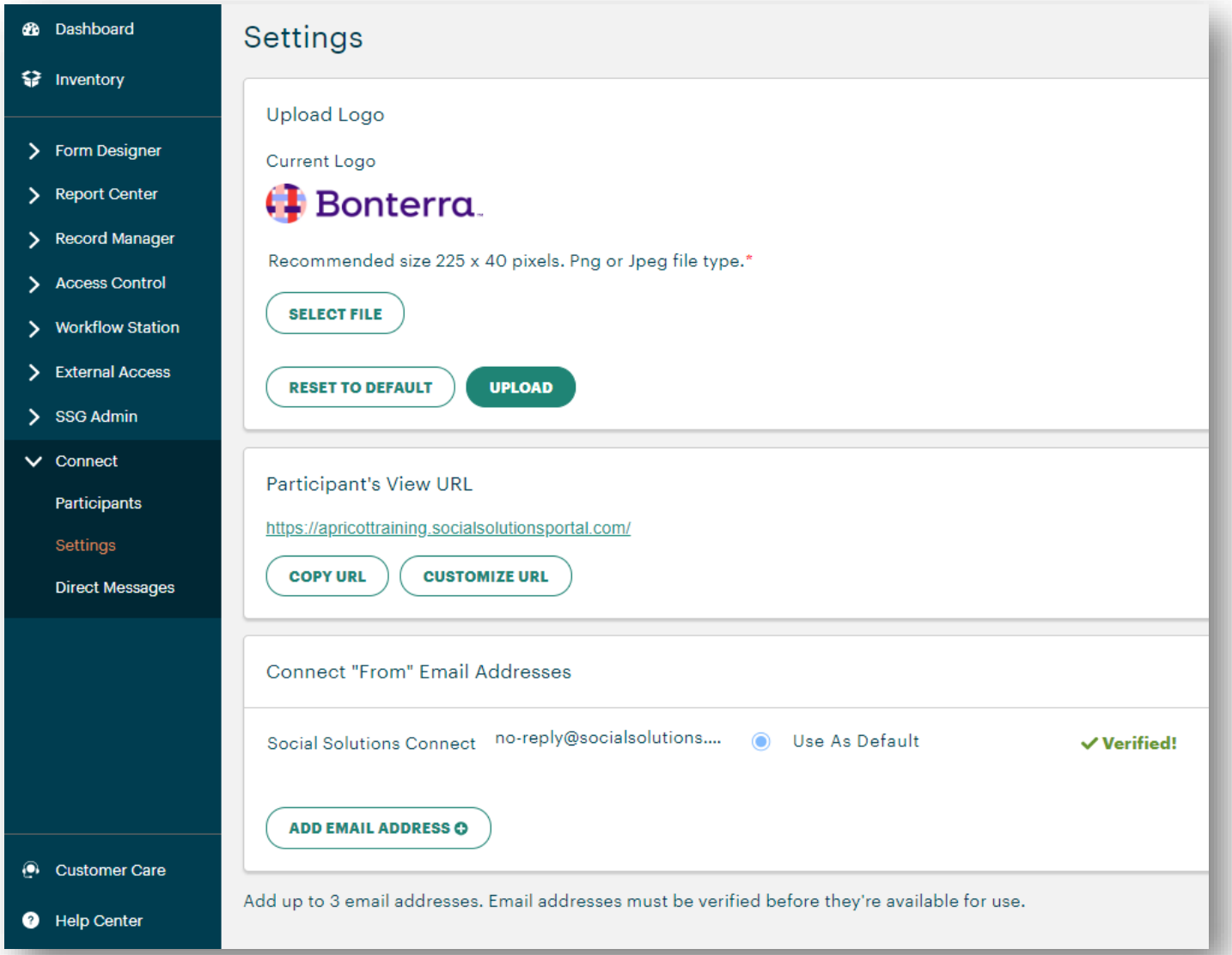
Step 4: Register Participants.

How to Configure

Step 1: Customize Settings.

Administrator > Connect > Settings

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



How to Configure

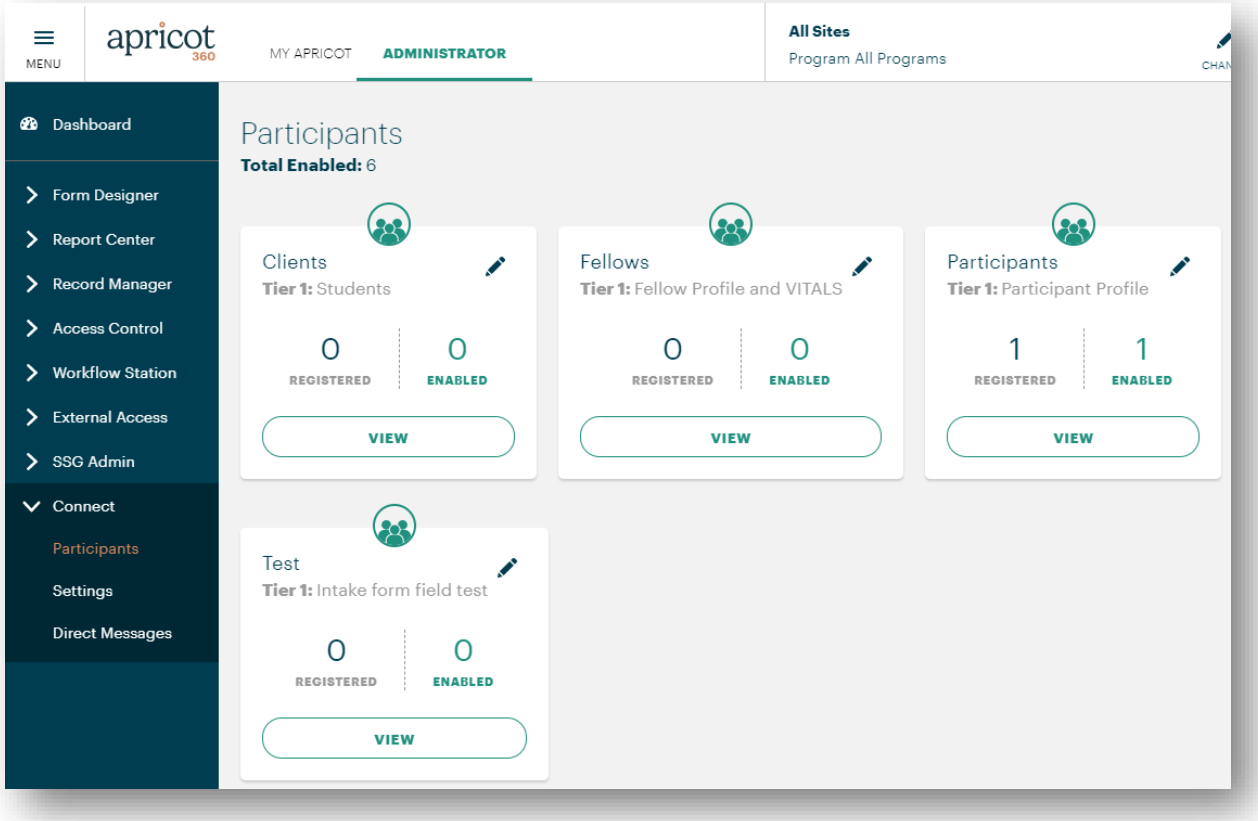
Step 2: Create Participant Types.

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

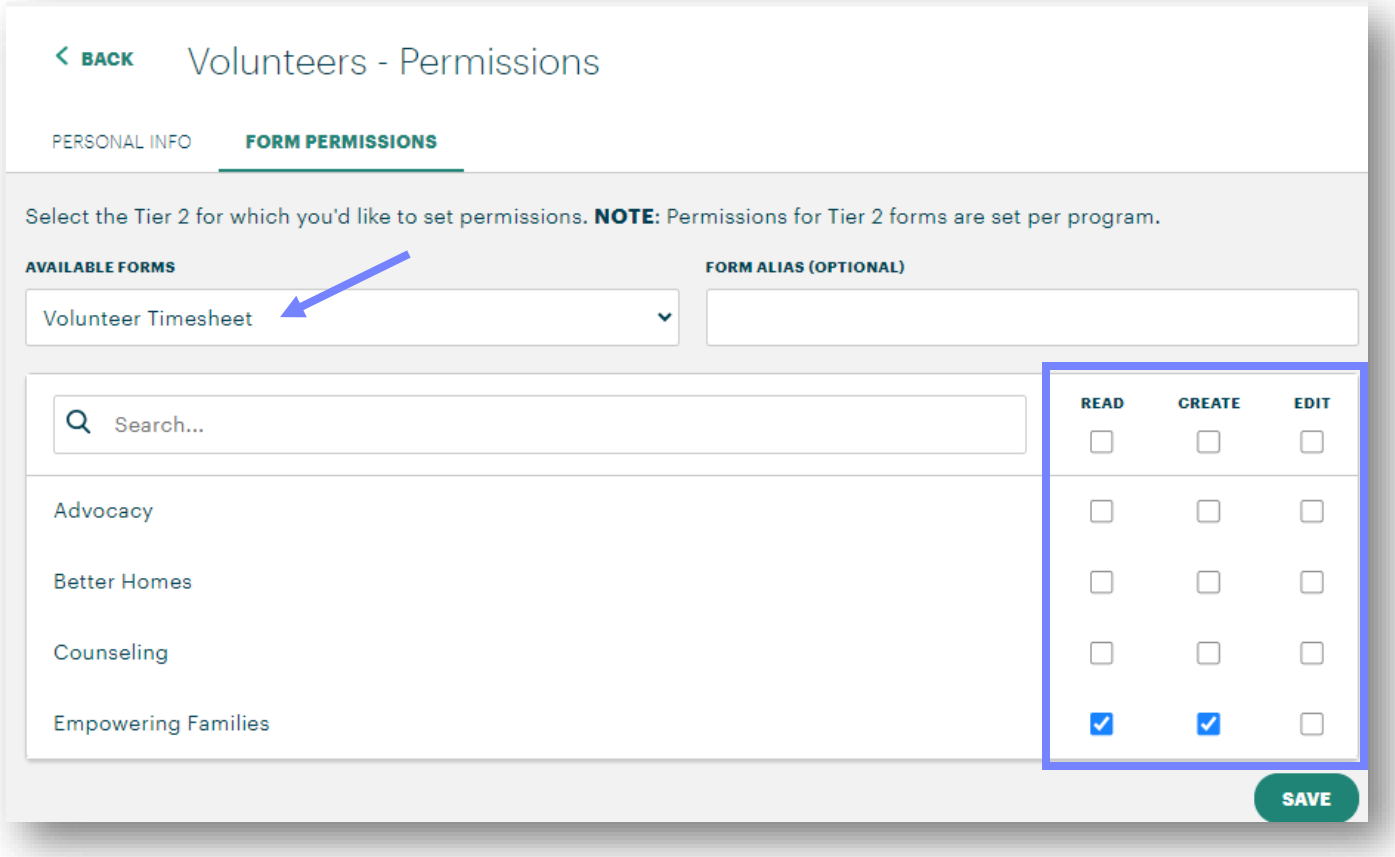


How to Configure

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



How to Configure

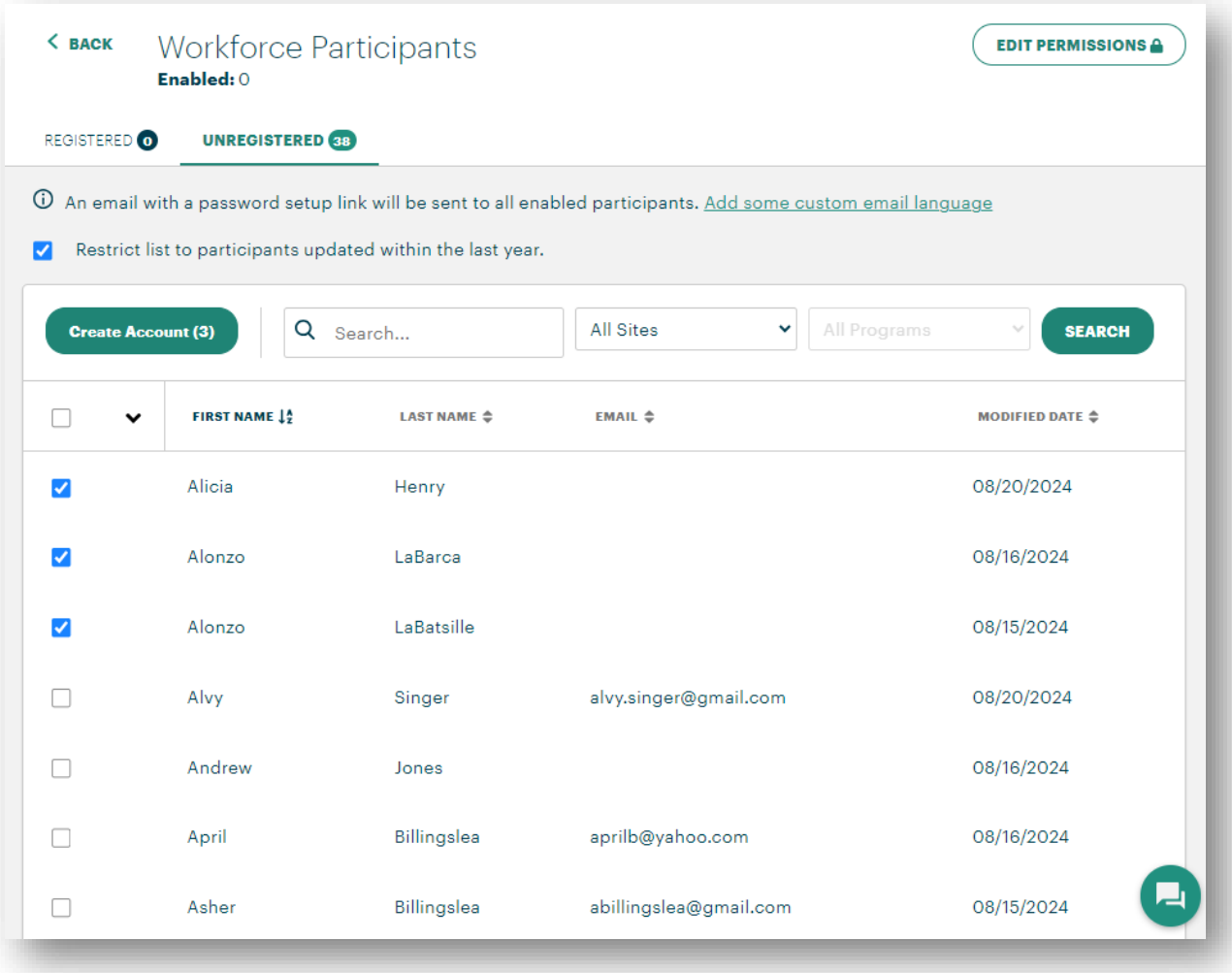
Step 4: Register Participants.

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:

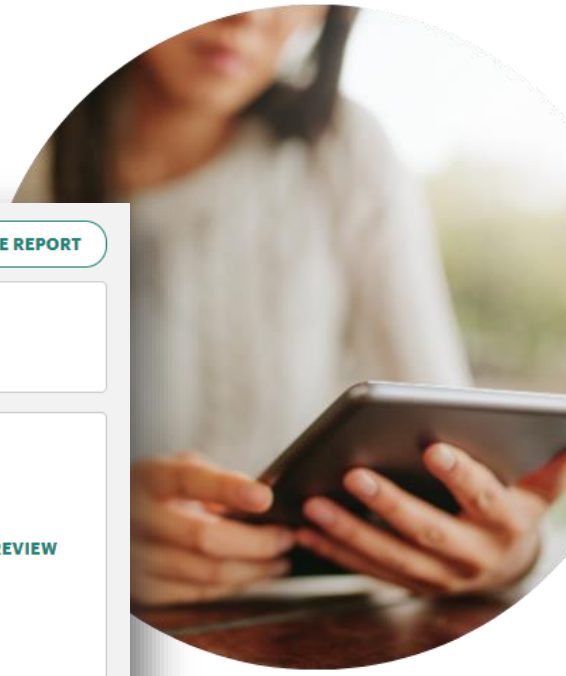
- Participants must have unique email address
- Can only be enabled in one type at a time
- Must be over 13 to access Connect

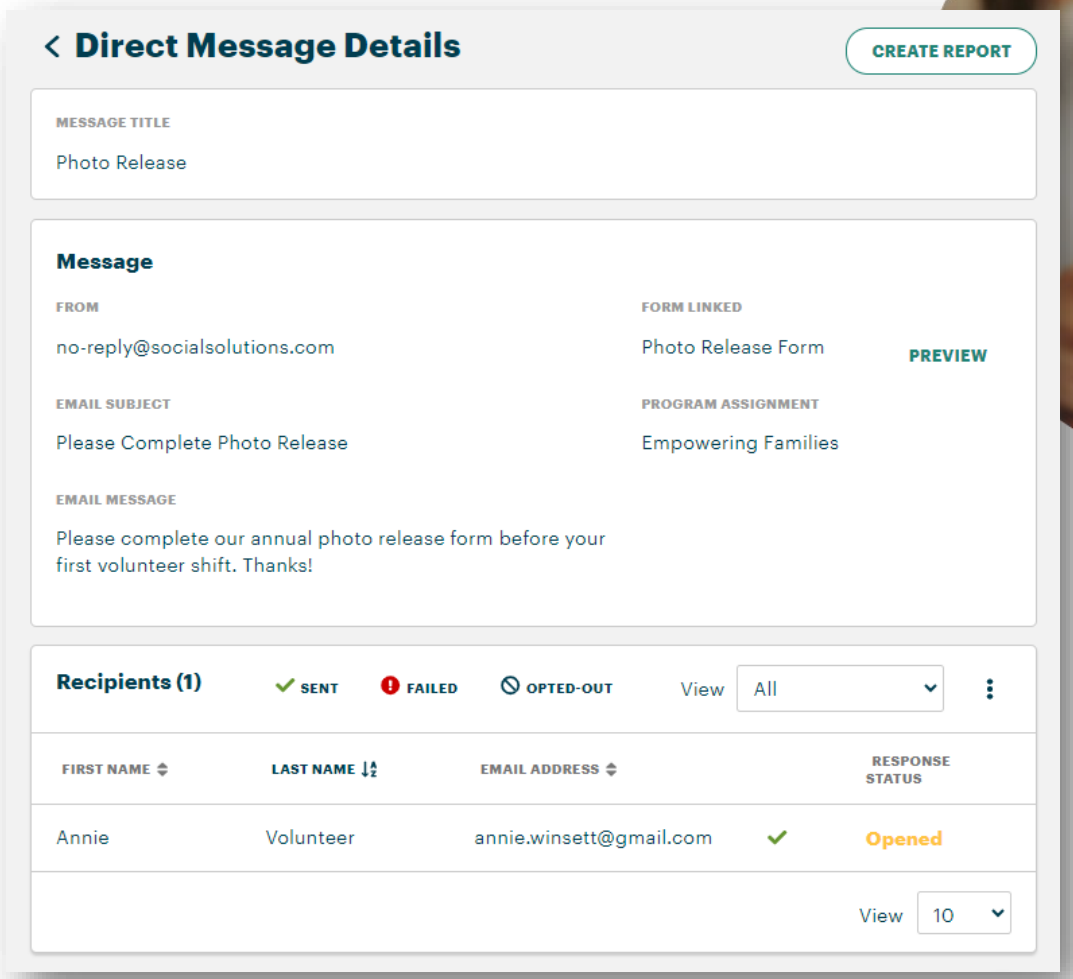


Direct Messaging

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 Messaging

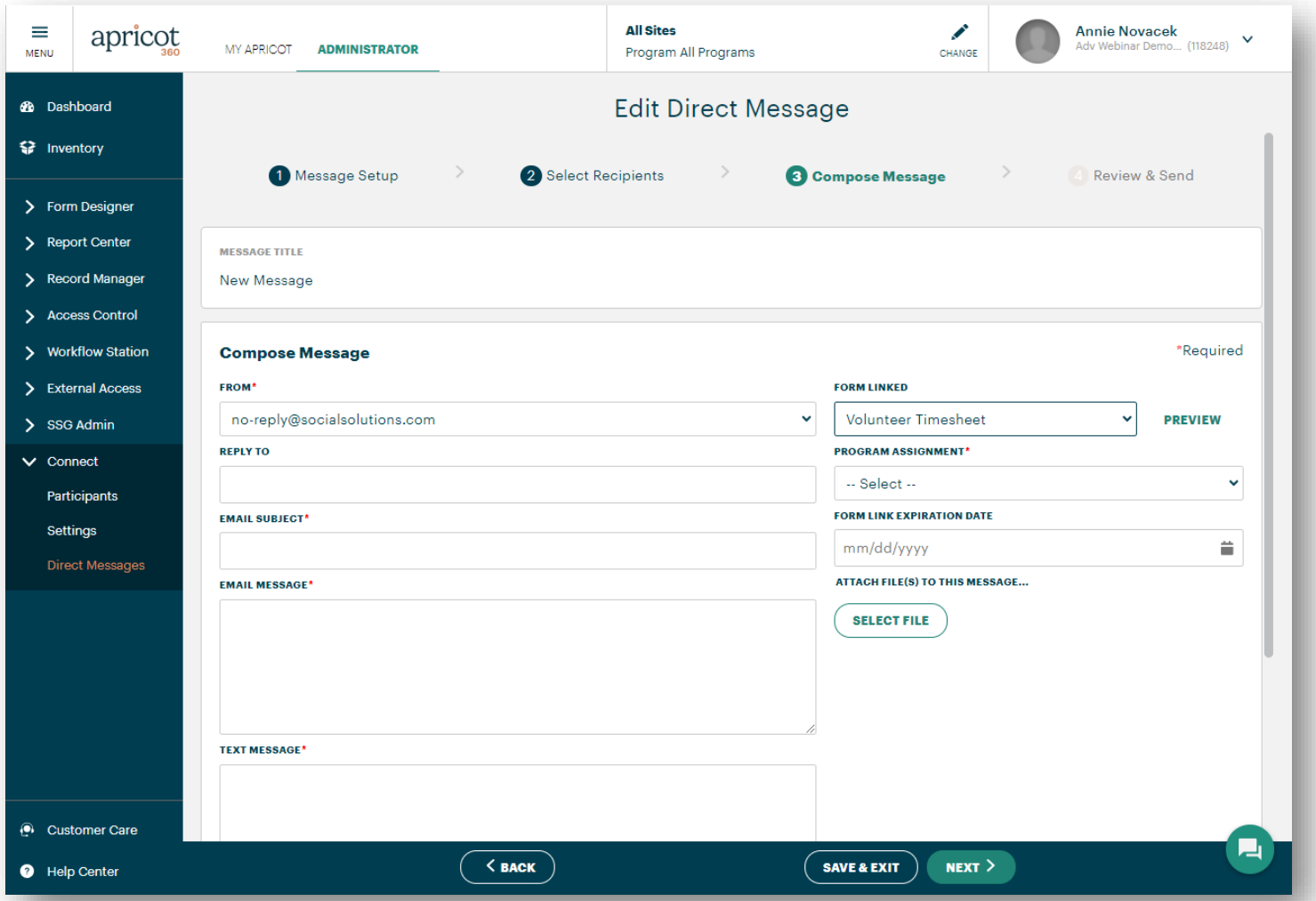
Step 1: Select Participant Type.

Step 2: Select Recipients.

Step 3: Compose Message.

Step 4: Review & Send.

Step 5: Track Responses.



Additional Resources

Additional Training Opportunities

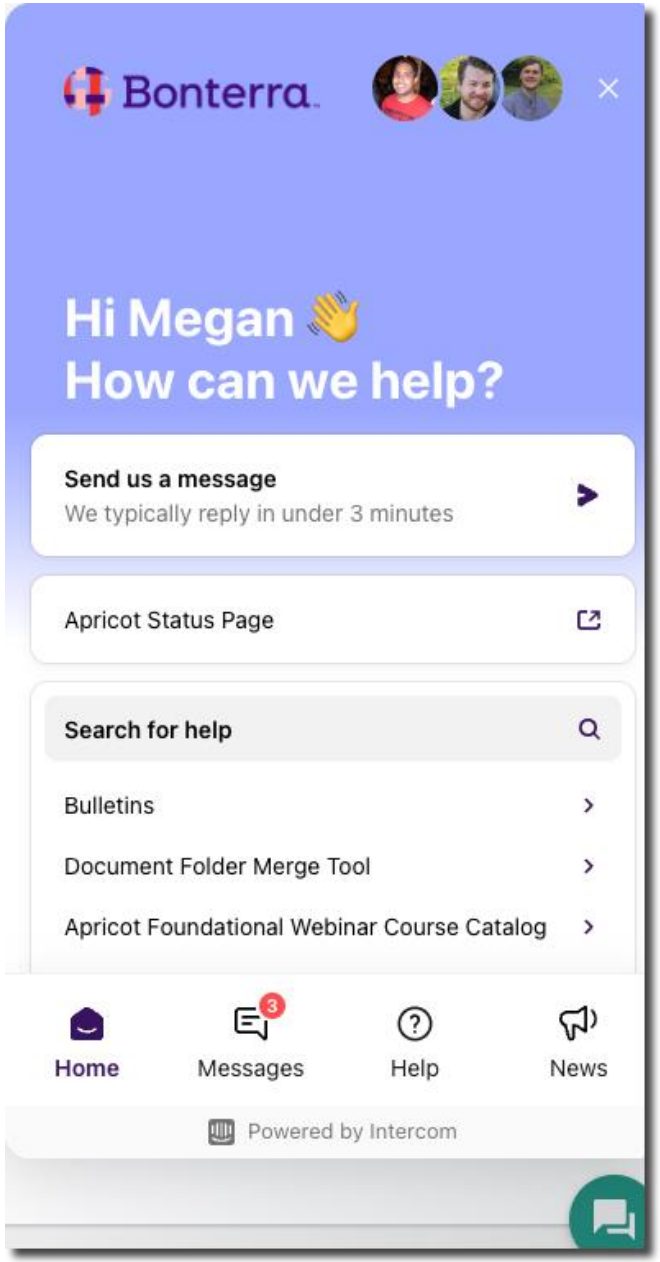
- Knowledge Base – How-To Articles (Search Chat or Visit Online)
- Bonterra Academy – Free Webinars & Recordings
- Foundations – Intensive, Multiday Courses to Cover Admin Basics
- Admin Labs – 2 Hour Live Trainings on Specific Capabilities
- Private Training – 1:1 Sessions with Training Expert in Your 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™