

Building Reports to Locate Intake Records

Apricot Targeted Webinar

Meet Your Trainer

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Learning Objective

This training will cover how to build a basic report that shows any records created through the Intake functionality.

This would be useful for staff that do initial outreach to individuals who have been referred by a 3rd party or self-referred via your Intake link.

Agenda

Building an Intake Records Report

Adding Filters

Report Bulletin

Building an Intake Records Report

Reporting

- Reports are built on the administrator side of Apricot
- Bring in fields from your intake form that staff would benefit from seeing at the initial referral stage

The screenshot shows the 'New Intake Referrals' reporting interface. At the top, there is a header 'New Intake Referrals' with a gear icon. Below it is a dark blue bar with 'Global Values' and an 'Add' button. Another dark blue bar contains 'New Intake Referrals' with a gear icon. Underneath, there are sections for 'Forms' (showing 'Participant (Always)'), 'Filters', and 'Limit Sections'. A central message states: 'Report last run June 24th 2024, 1:13 pm', 'Click to refresh data', and 'Auto run has been turned off for this section. Click here to turn it back on.' At the bottom, a table of report columns is shown, with the first six columns highlighted by a red box:

Name	Preferred Name/Nickname	Pronouns	Age	Mobile Phone	Referral Date	Days Since Referral	Created By
...

“Days Since Referral” Calculation

- Calculation columns can be added to highlight the number of days since receiving a referral

The screenshot displays a software interface for managing 'New Intake Referrals'. At the top, there is a header 'New Intake Referrals' with a gear icon. Below this is a dark teal bar with 'Global Values' and an 'Add' button. Another dark teal bar contains 'New Intake Referrals' and another gear icon. Underneath, there are sections for 'Forms' (with 'Participant (Always)'), 'Filters', and 'Limit Sections'. A central message states: 'Report last run June 24th 2024, 1:13 pm', 'Click to refresh data', and 'Auto run has been turned off for this section. Click here to turn it back on.' At the bottom, a table of columns is shown, each with a gear icon for configuration. The columns are: Name, Preferred Name/Nickname, Pronouns, Age, Mobile Phone, Referral Date, Days Since Referral (highlighted with a red box), and Created By.

Name	Preferred Name/Nickname	Pronouns	Age	Mobile Phone	Referral Date	Days Since Referral	Created By
...

“Created By” Filter

- Add a column for “Created By” under System Fields on your form
- Add a filter to only show created by Apricot Subsystem

The screenshot displays a software interface for "New Intake Referrals". It features a dark teal header with a gear icon. Below the header, there are three main sections: "Forms", "Filters", and "Limit Sections". The "Filters" section is highlighted with a red box and contains a filter rule: "Created By Equals Apricot Subsystem". Below the filters, there is a report status message: "Report last run June 24th 2024, 1:38 pm", "Click to refresh data", and "Auto run has been turned off for this section. Click here to turn it back on." At the bottom, there is a row of column headers, each with a gear icon. The "Created By" column header is highlighted with a red box.

Name	Preferred Name/Nickname	Pronouns	Age	Mobile Phone	Referral Date	Days Since Referral	Created By
...

List Removal Criteria

- Add a column for “Created By” under System Fields on your form
- Add a filter to only show created by Apricot Subsystem

The screenshot displays the configuration interface for 'New Intake Referrals'. It features a dark teal header with a gear icon. Below the header, there are three expandable sections: 'Forms', 'Filters', and 'Limit Sections'. The 'Forms' section is highlighted with a red box and contains two options: 'Participant (Always)' and 'Program Enrollment (Never)'. A red arrow points to the 'Participant (Always)' option. The 'Filters' section contains one filter: 'Created By Equals Apricot Subsystem'. The 'Limit Sections' section is currently empty. Below these sections, there is a status message: 'Report last run June 24th 2024, 2:20 pm', 'Click to refresh data', and 'Auto run has been turned off for this section. Click here to turn it back on.' At the bottom, there is a row of column headers for a table, each with a gear icon for configuration. The columns are: Name, Preferred Name/Nickname, Pronouns, Age, Mobile Phone, Referral Date, Days Since Referral, Created By, and Record ID. The 'Record ID' column is highlighted with a red box.

Final Report

New Intake Referrals

New Intake Referrals ▼

▼ Forms

- Participant
- Program Enrollment

▼ Filters +

Created By Equals Apricot Subsystem

▼ Limit Sections

Report last run June 24th 2024, 2:28 pm
[Click to refresh data](#)

Search Displaying 4 of 4 Rows (Expand All Cells)

Name ▼	Preferred Name/Nickname ▼	Pronouns ▼	Age ▼	Mobile Phone ▼	Referral Date ▼	Days Since Referral ▼
Leoson Dodders (2640)	Leo	He/Him	13	...	06/21/2024 2:58 PM	3
Patrick McMahon (2641)		They/Them	14	777.777.7777.	06/21/2024 3:19 PM	3
Simone Shailey (2648)	Simmy	She/Her	16	999.999.9999.	06/24/2024 3:12 PM	0
Terry Minew (2649)		He/Him	23		06/24/2024 3:24 PM	0

Total Rows
4

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)

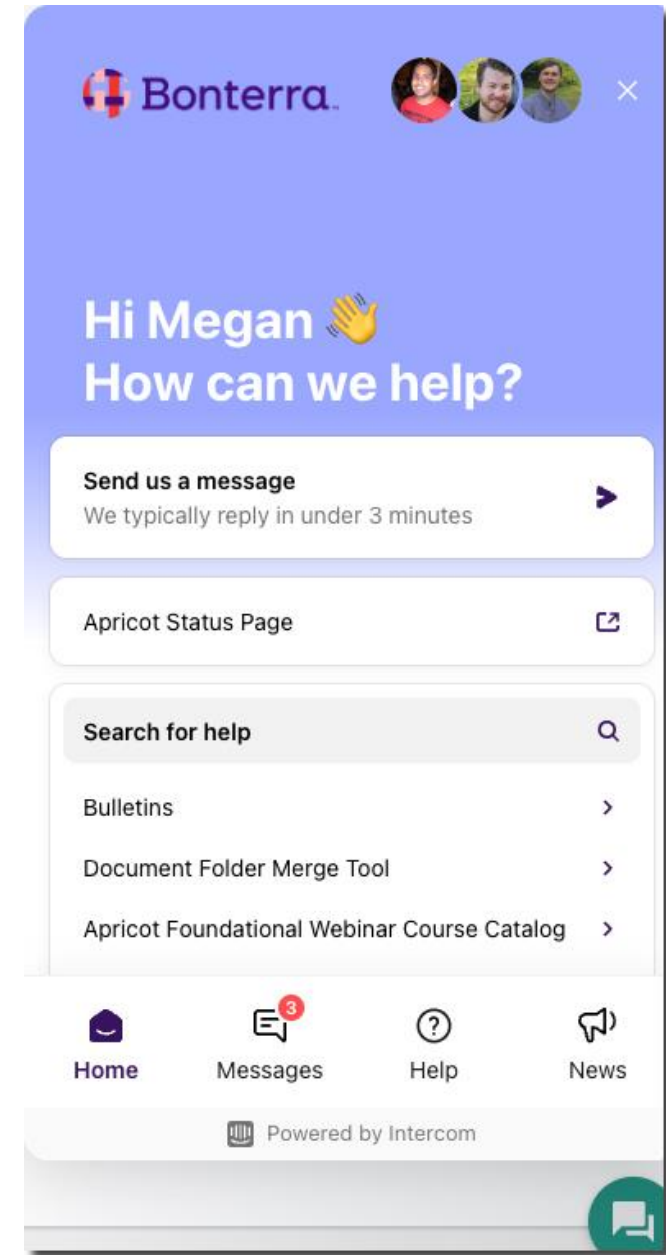


Build confidence & knowledge in
our software!

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.