

# Helping Users Prioritize Key Tasks in Apricot

Welcome, we will start shortly!

# Meet Your Trainer

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# Learning Objective

By the end of this session, our goal for you is to understand the tools that can help your staff prioritize and focus their day within Apricot.

# Agenda

Overview

Bulletins

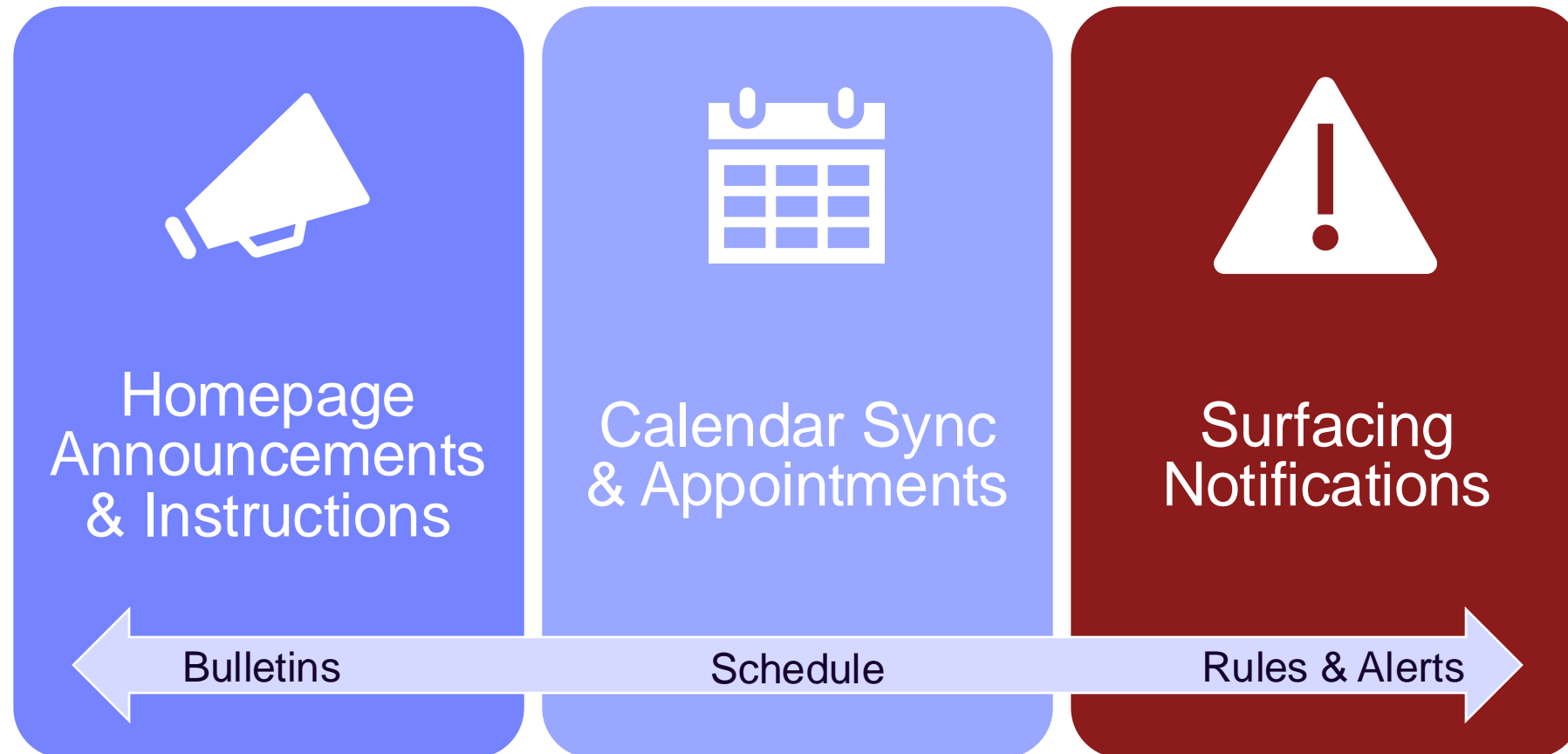
Schedule

Rules & Alerts

# Overview

# Prioritization in Apricot

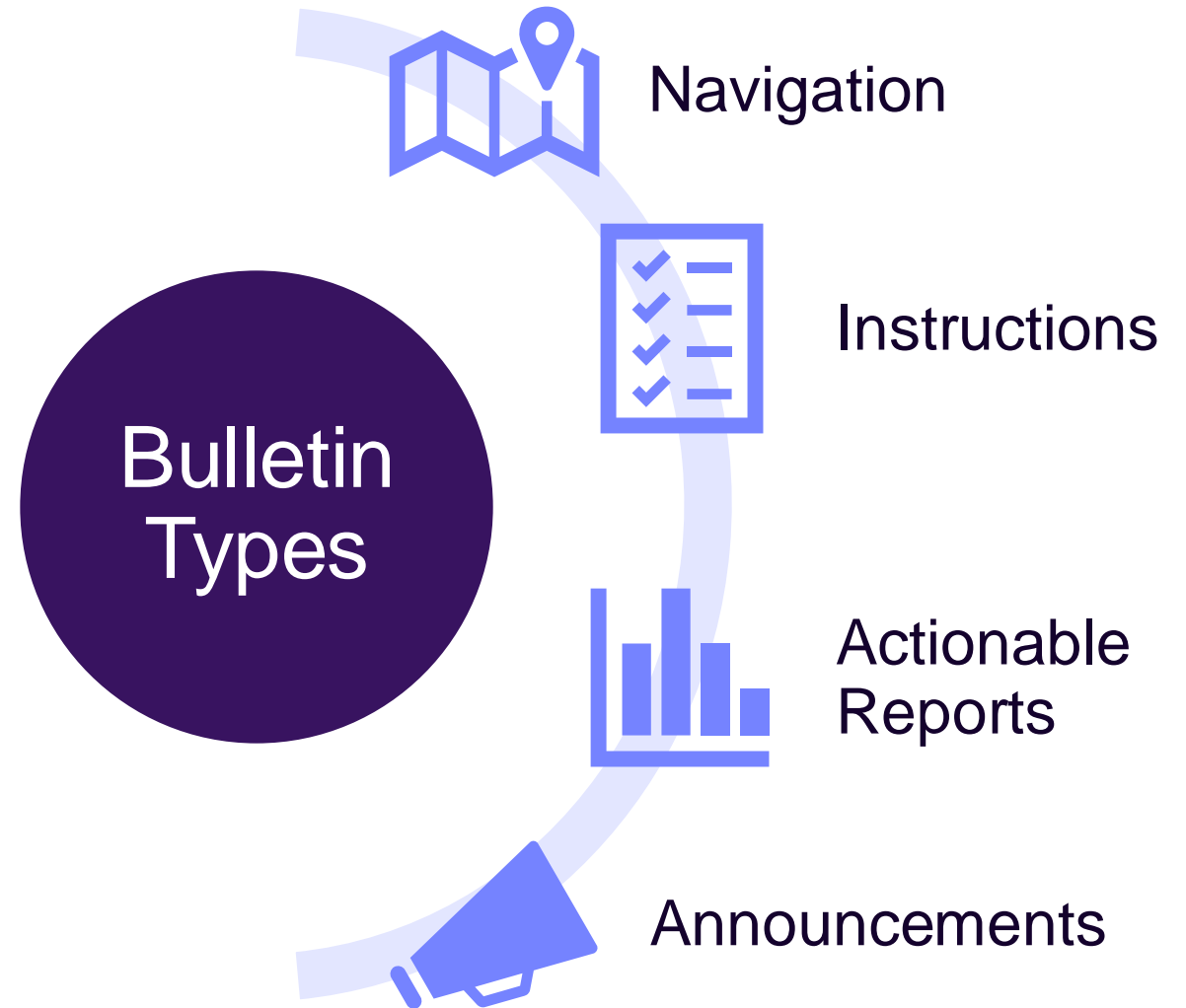
Tools & tactics to help focus staff on what needs their attention most within Apricot.



# Bulletins

# Bulletins

- Opportunity to feature key instructions & information on your staff homepage
- Customize by Program & Role
- Start Expanded for Most Important
- Set Dates for Relevant Timeframe





# Bulletins

Need Help? ▾ Welcome to Your Training Site!

## Welcome to our Case Management System!

*If you have questions or need assistance please take the following steps:*

Step 1  
Review the FAQ form by [Clicking Here](#)

*If the FAQ document does NOT address your needs continue to step 2.*

Step 2  
Email us at [datasupport@gmail.com](mailto:datasupport@gmail.com)

Please include the following in your email:

- Name of the feature or form you're using
- Error message if any and the steps you took leading up to the error.
- Screen shot of issue

If you simply have requests, suggestions and or recommendations that submit them by [clicking here](#) to complete our suggestions form.

### Navigation ▾

- Participant Search
- New Participant
- Household Search
- New Household

### Incoming Referrals ▾ Pending Referrals

New Section  
Report last run September 18th 2024, 4:20 pm  
[Click to refresh data](#)

Search   Displaying 4 of 4 Rows (Expand All Cells)

Submission Date	First	Last	Date of Birth	Client Phone Number	Client Email
08/30/2024	Sarah	Jones	05/02/2000	412.498.8933.	Sarah@gmail.com
08/30/2024	James	Jimenez	04/20/1989	423.672.0000.	JJ1989@gmail.com
08/30/2024	Carlos	Alegre	12/04/1996	123.454.8733.	Carlos@gmail.com
08/30/2024	Ted	Smith	12/05/2004	123.652.2394.	Tedsmom@gmail.com

Total Rows  
**4**

# Bulletins

Administrator > Workflow Station > Bulletins

**Step 1:** Click [+ Create New Bulletin].

**Step 2:** Pick a Category & Assign Name.

**Step 3:** Choose Type: HTML or Report.

**Step 4:** Configure Settings.

**Step 5:** Add Content & Save.

**Step 6:** Update Access in Roles.

The screenshot shows the 'Bulletin Details' form. At the top, it says 'Required fields are indicated with an \*'. The form has several sections:

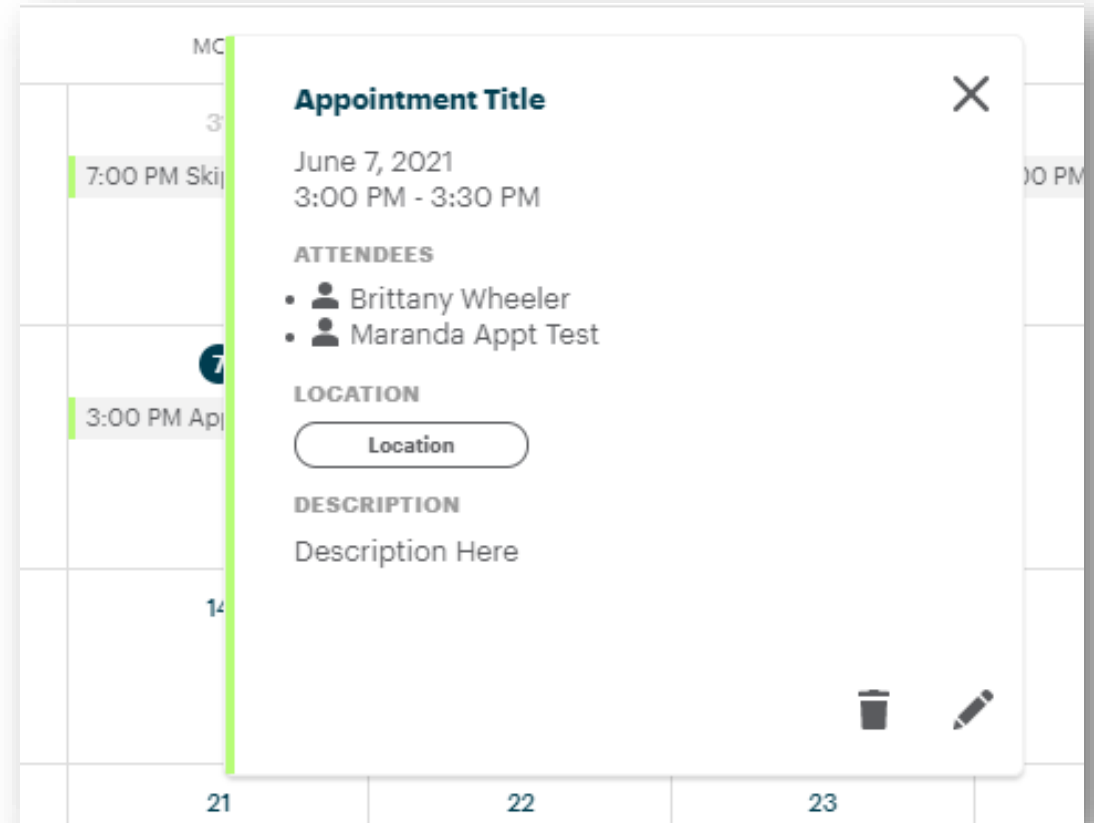
- Title\*:** A text input field containing 'Navigation'.
- Type:** A dropdown menu set to 'HTML'.
- Start Date:** A date input field with a calendar icon.
- End Date:** A date input field with a calendar icon.
- Active:** A checked checkbox.
- Start Collapsed:** A checked checkbox.
- Use Default Color:** A checked checkbox.

Below these fields is a rich text editor with a toolbar containing icons for source, undo, redo, image, table, list, link, unlink, and other editing tools. The toolbar also includes 'Styles', 'Font', and 'Size' dropdown menus. The main content area is empty. At the bottom left of the editor, the text 'body p' is visible.

# Schedule

# Apricot Schedule

- Ability to sync calendar & view schedule in Apricot
- Option to book & track appointments with Participants
- Appointments show in Document Folder & send calendar invite outside of Apricot
- Available for Apricot Pro (Core) & Enterprise (360)



# Configuring Schedule

[My Apricot Tools](#) > [Schedule](#)

**Step 1:** Configure Schedule & Tier 1 Attendees.

**Step 2:** Sync Your Calendar with Apricot.

**Step 3:** Set Availability for Bookings.

**Step 4:** Start Booking Appointments.

### Feature Configuration

The options selected below will be used to populate features within Apricot.

ATTENDANCE **SCHEDULE**

**Participant Information**  
Information pertaining to the form used to create client records

**PARTICIPANT FORM \***  
Select... | v

**PARTICIPANT NAME FIELD \***  
Select... | v

**PARTICIPANT EMAIL FIELD \***  
Select... | v

**PARTICIPANT QUICK VIEW FIELD**  
Select... | v

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**Optional**  
Do you have multiple Tier 1 forms that you use to create client records? You can designate a second Tier 1 form to be used below...

**SECONDARY PARTICIPANT FORM**  
Select... | v

**PARTICIPANT NAME FIELD \***  
Select... | v

**PARTICIPANT EMAIL FIELD \***  
Select... | v

**PARTICIPANT QUICK VIEW FIELD**  
Select... | v

Save

# Scheduling Appointments

**Step 1:** Select Participant(s).

**Step 2:** Select Staff Attendee(s).

**Step 3:** Set Time & Date.

**Step 4:** Add Appointment Name & Description.

**Step 5:** Add Location or Video Conference Info.

**Step 6:** Click [Add] to Send Invite.

The screenshot shows a web form titled "Add Appointment" with a calendar icon. The form is divided into three main sections: "Who?", "When?", and "What?".

- Who? (Required):** Contains two dropdown menus: "PARTICIPANT" and "STAFF ATTENDEE(S)".
- When?:** Includes radio buttons for "Select Date/Time From Availability Viewer" and "Type in Date/Time" (which is selected). Below are input fields for "START DATE", "START TIME", "END TIME", and "END DATE", along with an "All Day" checkbox.
- What?:** Contains text input fields for "APPOINTMENT TITLE" and "APPOINTMENT DESCRIPTION".

At the bottom right, there are "Cancel" and "Add" buttons.

# Rules & Alerts

# Rules & Alerts

- Surface important notifications for staff
- Create alerts based on data entered needing notice
- Available for Apricot Pro (Core) & Enterprise (360)
  - Time-Based Alerts for Enterprise (360) only

## Example Use Cases:

- Participants At Risk
- Upcoming Deadlines
- Manager Review Needed
- Success to Celebrate

CHANGE NOTIFICATIONS Charles Leclerc  
Juan Pantoja Training

### Notifications

LATEST [Mark All Read](#) | [Clear All](#)

12/02/2022  
Notify

[April Billingslea - Advocacy](#)

12/02/2022  
Notify

[Alicia Henry - Counseling](#)



# Configuring Rules & Alerts

Administrator > Workflow Station > Rules & Alerts

## Step 1: Rule Details

- Rules Name & Description.

## Step 2: Trigger

- Choose Form & Field Criteria for Alert.
- Time-Based triggers limited to Enterprise.

### 1. Rule Details

RULE NAME  
**New Participants**

RULE DESCRIPTION  
**Notice of new participant records**

FORM  
**Participant**

### 2. Trigger

Tell us how your notification should be triggered \* Required

Select a record event below \*

On Tier 1 Record Create

Add optional field level condition(s)

When field Primary Language | Contains | English

Add Field Condition

Save & Continue

# Configuring Rules & Alerts

Administrator > Workflow Station > Rules & Alerts

## Step 3: Action

- Compose Alert Message.
- Choose Recipient(s).

### 3. Action

**NOTIFICATION MESSAGE\*** \* Required

Message

0 of 80 characters | Brief description of action required that will show each time this notification is issued.

**Create:**  In-Product Notification  Email Notification

for...  Site/Program/Role/User  User Type

Select a Site | v

Select a Program | v

Select a Role | v

Select a User | v

**Add Action**

# Managing Alerts

## Alert States:

- **Brand New** – Not seen > Orange Dot
- **Unread** – Seen, but not Clicked > Orange Shaded
- **Read** – Seen & Clicked > Un-bolded / Unhighlighted
- **Cleared** – X Clicked to Clear > No Longer Listed

CHANGE NOTIFICATIONS Charles Leclerc  
Juan Pantoja Training

### Notifications

LATEST [Mark All Read](#) | [Clear All](#)

12/02/2022

Notify  X  
[April Billingslea - Advocacy](#)

12/02/2022

**Notify**  X  
[Alicia Henry - Counseling](#)

# Rules & Alerts Alternative

- Email Triggers can also be used for Alerts outside of Apricot
- Option for non-users or those without Apricot Pro or Enterprise
- Configure to send email after record save based on data entered
- Can include data from the record in the message sent
- Must be mindful of security of data sent outside of Apricot



# Rules & Alerts Alternative

**Step 1:** Add Email Trigger Field to Form.

**Step 2:** Publish Form to Enable.

**Step 3:** Open Field Settings to Configure.

- Set Recipient(s)
- Compose Message
- Choose Triggers

**Step 4:** Republish Form.

**Step 5:** Trigger as New Records Created.

Program All Programs

CHANGE

### Field Properties (email trigger)

Display Name  
Email Trigger

Standard Properties

- Required
- Duplicate Check
- Locked
- Quick View
- Searchable
- Hidden
- Restricted
- Clear On Copy

Special Properties

Tooltip

1

Main | **Email Text** | Filters | Attachments

Subject

2 [Text]

3 Add Field To Subject

Body\*

4

5 Add Field To Body

Add Field Set To Body

Deactivate Apply

# 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)

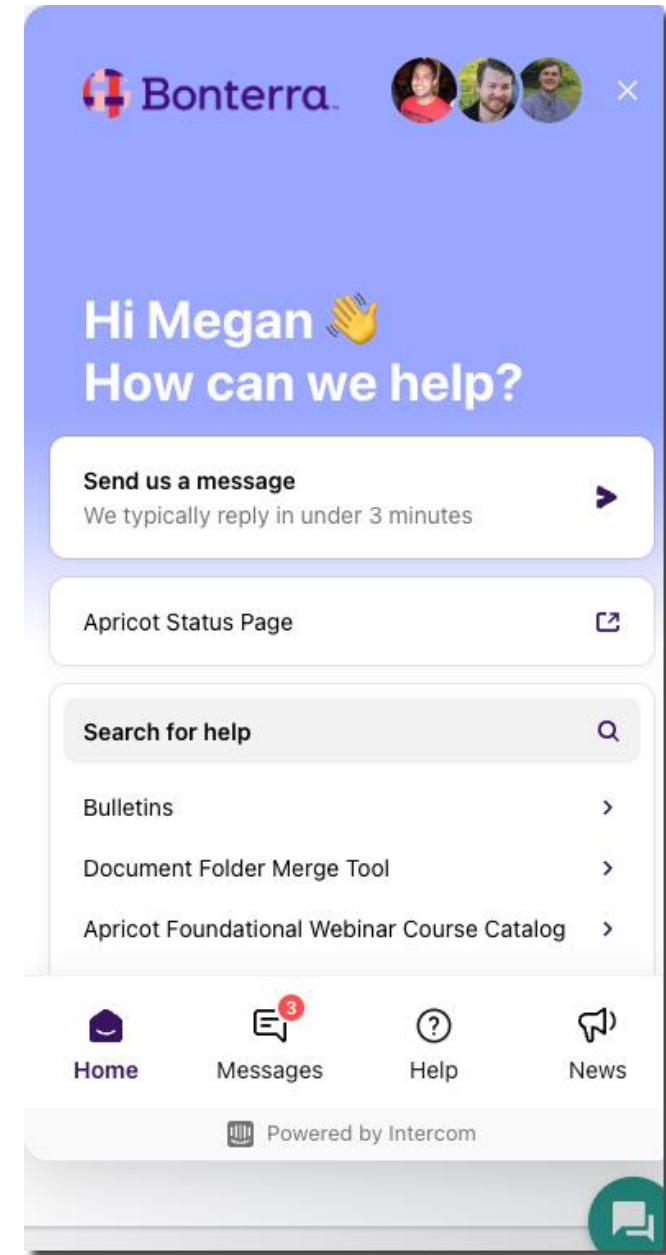


Build confidence & knowledge in  
our software!

# 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](mailto: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.