

# Apricot Extracting Your Data: A Best Practice Guide for Building Reports

# Meet Your Trainer

First Name Last Name

Training & Development Associate

# Learning Objective

Review foundational skills and expected behavior of the Report Builder in Apricot so that Administrators can make informed decisions when creating or modifying reports.

# Agenda

Purpose

Structure of Report Builder

Building Reports

Formatting Reports

# Purpose of the Report Builder

# Purpose of the Report

Retrieve records created via Forms in the system

**Participant Profile Search**

-- Add Search Field -- [Browse All](#)

Showing 1 - 20 of 65 available Participant Profile records

Participant Name	Date Of Birth	Client Status	Client Email
Alicia Henry	08/19/1965	Active	
Alonzo LaBarca	04/03/1998	Active	
Alonzo LaBatsille	03/04/1998		
Alvy Singer	10/01/1978		
Andrew Jones	05/16/1985		

**Client List**

New Section

- Forms
  - Participant Profile
- Filters
- Limit Sections

Report last run May 25th 2023, 3:05 pm  
[Click to refresh data](#)

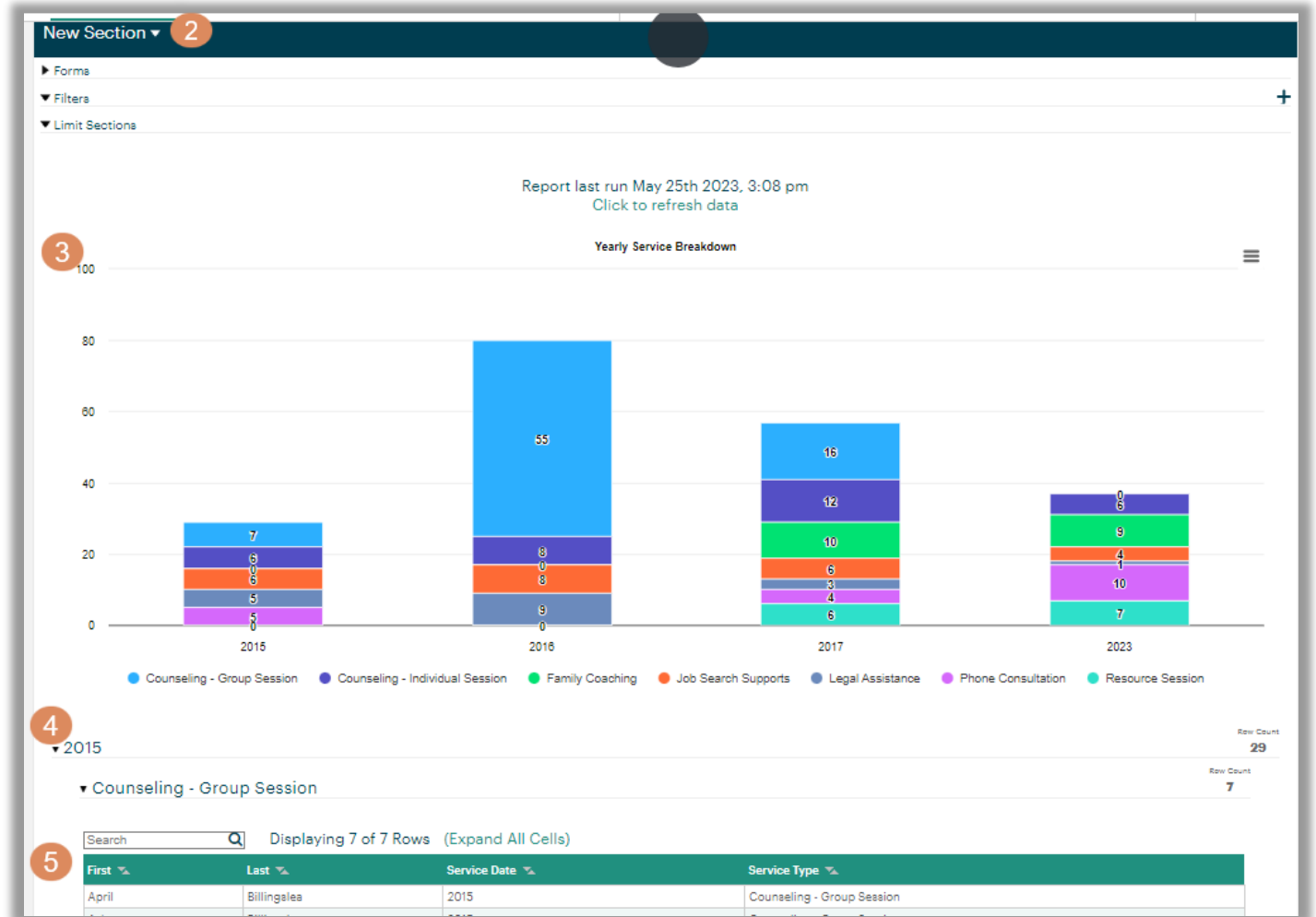
Search   Displaying 65 of 65 Rows (Expand All Cells)

First	Last	Date of Birth	Intake Date	Client Status	Gender	Ethnicity
Alicia	Henry	08/19/1965	04/04/2017	Active	Female	Non-Hispanic
Alonzo	LaBatsille	03/04/1998	09/09/2016	Active	Male	Hispanic
Alonzo	LaBarca	04/03/1998	02/10/2010	Active	Male	Non-Hispanic
Alvy	Singer	10/01/1978	05/14/2016	Active	Male	Hispanic
Andrew	Jones	05/16/1985	09/01/2016	Active	Male	Non-Hispanic

# Structure of the Report Builder

# Structure of the Report

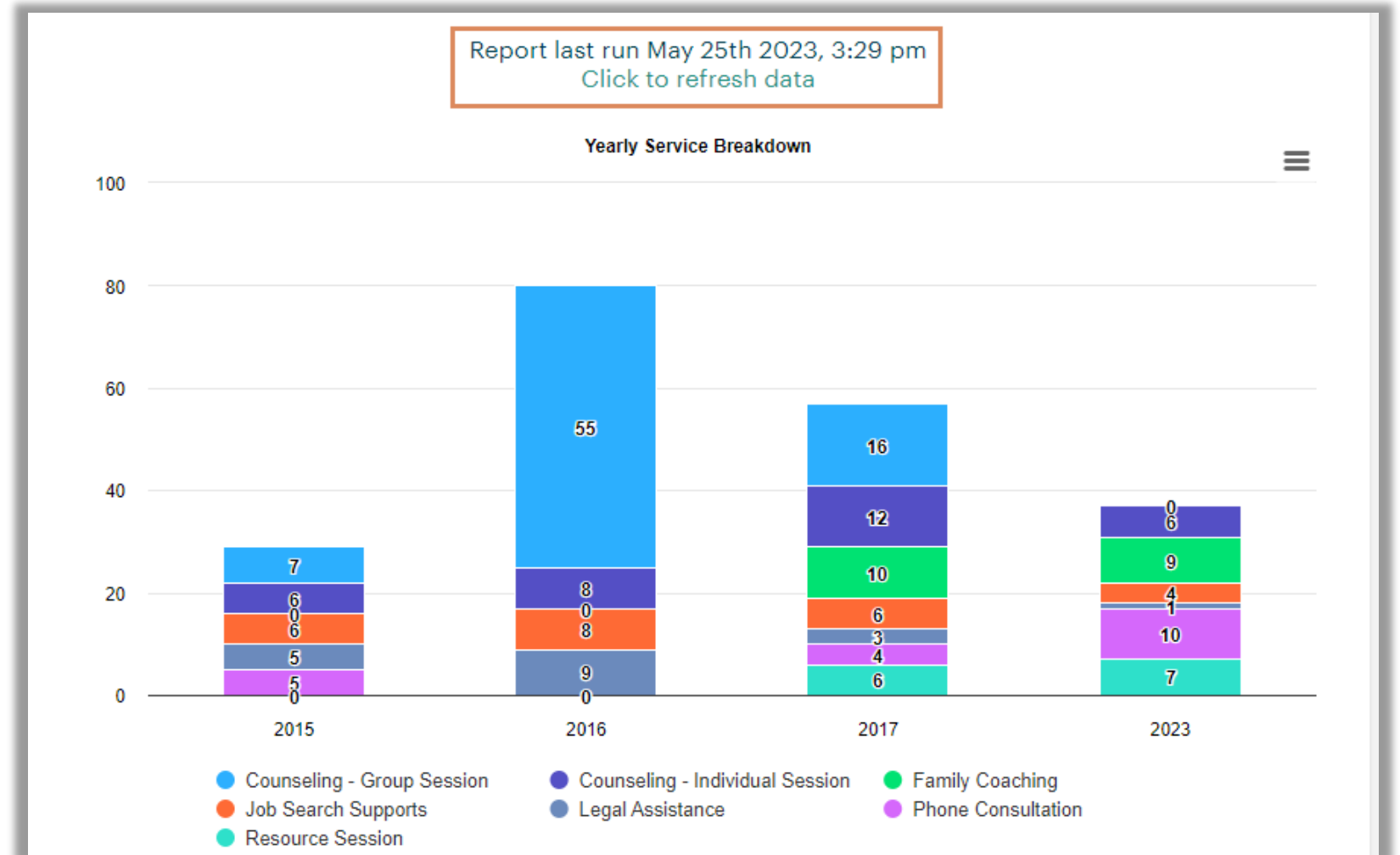
1. Title
2. Section
3. Graph
4. Group Drilldown
5. Table





# Structure of the Report

Data is current as of run time



# Structure of the Report

Data is current as of run time

Data is functional

▼ 2015

▼ Counseling - Group Session

Search  [Click to open original record](#) [Expand All Cells](#)

First ▼	Last ▼	Service Date ▼	Service Type ▼
April	Billingslea	2015	Counseling - Group Session
Asher	Billingslea	2015	
Asher	Billingslea	2015	
Sarah	Greene	2015	

Service Tracking

Asher Billingslea

[Quick view information](#)

Service Information ▼

This form should be completed when a participant, family, or group receive a service. If a participant receives multiple services on the same date, a record should be entered for each service.

\*Service Date  
07/22/2015

Service Location/Method

- Phone
- Text
- Email
- Web Conference
- In-Person Office
- In-Person Community
- In-Person Home Visit

\*Service Type  
Counseling - Group Session ▼

\*Service Time in Hours  
2.00

# Structure of the Report

Data is current as of run time

Data is functional

Great for Cyclical Reports

The screenshot displays a user interface for managing reports. On the left, a dark sidebar contains navigation items: 'Search Records', 'My Workflows', 'My Reports' (highlighted with an orange border), 'My Bulletins', 'My Shared Files', and 'Schedule'. The main content area is titled 'My Reports' and features a dark header with the text 'Select a Report Below'. Below this header, a list of report categories is shown: 'Monthly Reports' (with a dropdown arrow), 'Data Quality Report' (with a right-pointing arrow), 'FY Report' (with a right-pointing arrow), 'No Initial Assessment' (with a right-pointing arrow), and 'Client Services' (with a right-pointing arrow). On the right side of the report list, there is an 'Actions' menu with a dropdown arrow, containing the options 'Run', 'Print', 'Export', and 'Edit'.

# Structure of the Report

Only Admins can run reports by default

The screenshot displays the Bonterra user interface. At the top, the user is identified as Sabrina Gilbert, with the role 'ADMINISTRATOR' highlighted in an orange box. The main content area shows the 'My Reports' section, which is also highlighted in an orange box. This section contains a list of reports under the heading 'Select a Report Below'. The reports are organized into two main categories: 'Monthly Reports' and 'Client Services'. Each report has an 'Actions' link next to it. The 'My Reports' menu item in the left sidebar is highlighted in an orange box. On the right side, there is a filter section titled 'Report List Filters' with options for 'Date', 'All', 'Creation Time', 'Modification Time', and 'Last Run'. The 'EXPAND ALL' button is also visible.

Report Name	Actions
Monthly Reports	
Data Quality Report	Actions
FY Report	Actions
No Initial Assessment	Actions
Client Services	
Client List	Actions
Service Stats	Actions
Count of Contacts by Client	Actions

# Structure of the Report

Only Admins can run reports by default

Admins can grant Standard Users access

The screenshot displays a user interface for a reporting tool. At the top, there is a navigation bar with a 'MENU' icon, 'All Sites' (Program All Programs), a 'CHANGE' button, a 'NOTIFICATIONS' bell icon, and a user profile for 'Carrie Caseworker' (Helping Hands Organization ...). A left sidebar contains 'Search Records', 'My Reports' (highlighted with an orange box), 'My Bulletins', 'My Shared Files', and 'Schedule'. The 'My Reports' section is expanded to show a dropdown menu with 'Client Services', 'Client List', and 'Service Stats', each with an 'Actions' link. On the right, there is an 'EXPAND ALL' button and a 'Report List Filters' section with a search icon and radio buttons for 'Date' (All, Creation Time, Modification Time, Last Run).

# Building Reports

# Building Reports

Admin only by default

Accessed via Report Center

The screenshot displays the Bonterra Reports administration interface. At the top, a navigation bar includes a 'MENU' icon, the role 'ADMINISTRATOR', the current site 'All Sites' (Program All Programs), and a 'CHANGE' button. The user profile for 'Sabrina Gilbert' is also visible. On the left, a dark sidebar menu lists 'Form Designer', 'Report Center', 'Reports' (highlighted with an orange box), 'Data Archives', and 'Report Migrations'. The main content area is titled 'Reports' and contains a dark header 'Select the Report You Wish to Modify Below'. Below this header is a list of report categories: 'Monthly Reports', 'Client Services', and 'Starter Reports', each with a right-pointing arrow and a gear icon. On the right side, there are two panels: 'Report Actions' with buttons for '+ Create New Category' and '+ Create New Report', and 'Report List Filters' with a search field for 'Date' and a radio button for 'All'.

# Building Reports

1. Report Category
2. Report

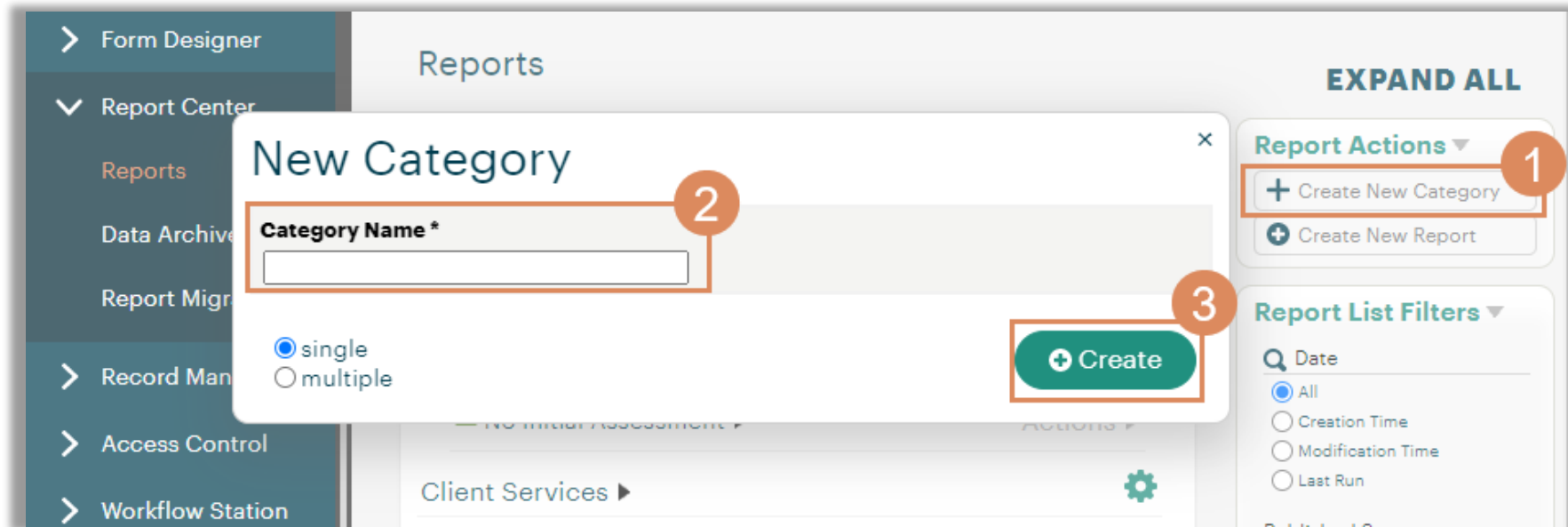
The screenshot displays the Bonterra software interface. On the left is a dark teal navigation sidebar with the following items: 'Form Designer', 'Report Center' (expanded), 'Reports' (highlighted in orange), 'Data Archives', 'Report Migrations', 'Record Manager', and 'Access Control'. The main content area is titled 'Reports' and contains a dark teal header with the text 'Select the Report You Wish to Modify Below'. Below this header is a list of report categories: 'Monthly Reports' (with a dropdown arrow), 'Data Quality Report' (with a pencil icon and a right-pointing arrow), 'FY Report' (with a green up arrow and a right-pointing arrow), and 'No Initial Assessment' (with a green up arrow and a right-pointing arrow). Below these is a 'Client Services' link with a right-pointing arrow. Two orange callout boxes are present: callout '1' points to the 'Monthly Reports' dropdown, and callout '2' points to the 'Data Quality Report' item.



# Building Reports

## Steps to Create a New Category

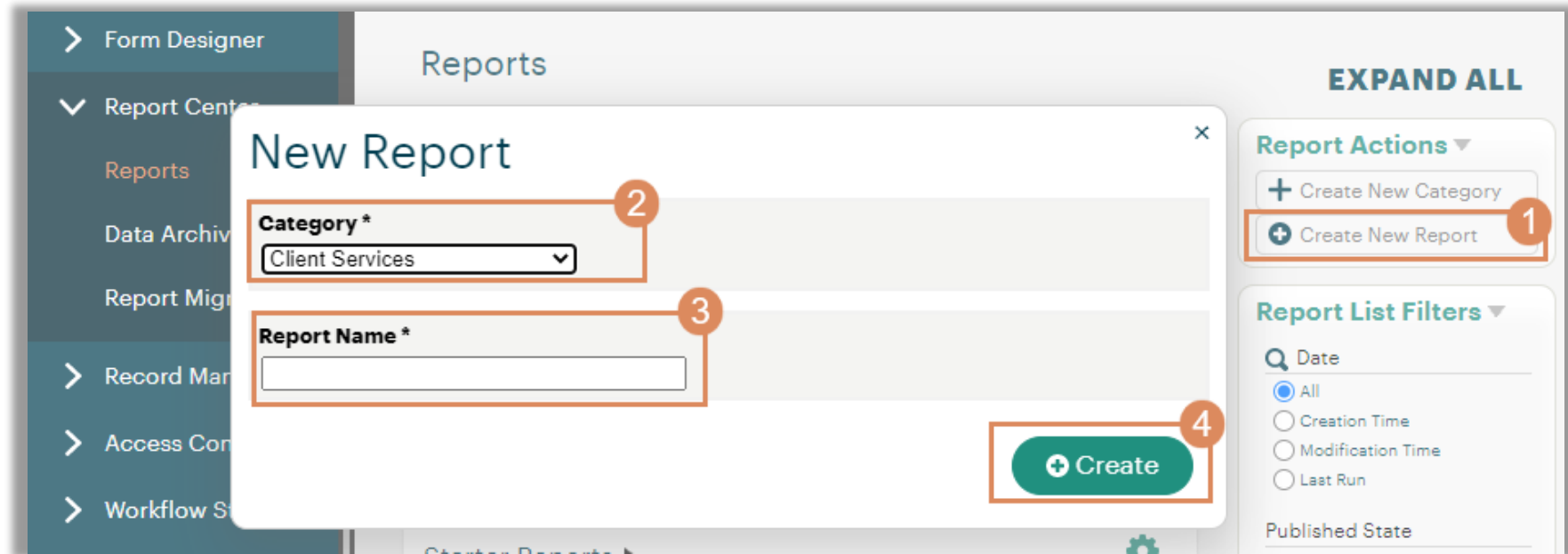
1. Create New Category
2. Name Category
3. Create



# Building Reports

## Steps to Start Creating a New Report

1. Create New Report
2. Assign to Category
3. Name Report



# Building Reports

One blank section by default

Drag and drop datapoints from field choices palette

Pending Inquiries List

Global Values ▾ Add

New Section ▾

▼ Forms

▼ Filters +

▼ Limit Sections

Report last run May 25th 2023, 3:56 pm  
Click to refresh data  
Auto run has been turned off for this section. Click here to turn it back on.

Drag items here to add them to your section  
(first field added will determine Root Form)

COLLAPSE ALL

Field Choices ▾

- ▶ Special Columns
- ▶ Sites and Programs
- ▶ Enrollments
- ▶ Participant Profile
  - ▶ Program Enrollment and Exit
  - ▶ Services
  - ▶ Positive Parenting Assessment
  - ▶ Counseling Appointment
  - ▶ Workforce Assistance

+ Add Multiple Columns

Requirements ▾

Publish checklist ✖

- The following sections have empty columns:  
New Section

# Building Reports

## Questions to ask when designing reports:

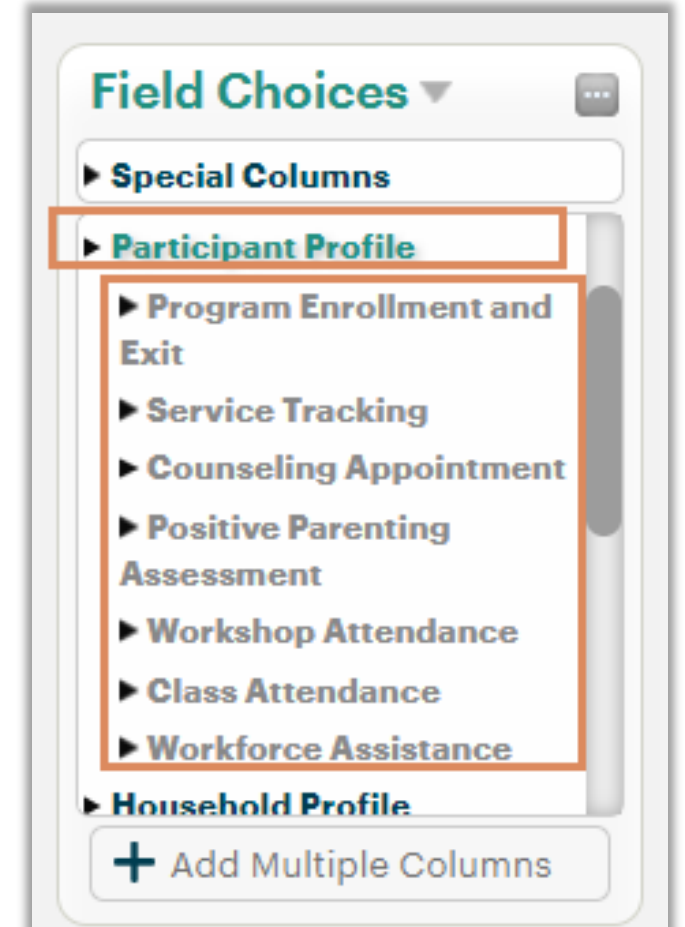
1. What forms are we using to track the metrics I want?
2. Which questions on those forms demonstrate the requested outcome(s) and/or information?
3. How specifically are we defining any subjective terms in the request (i.e., active, enrolled, successful completion)?



# Building Reports

Tier 1 Forms first

Tier 2 Forms underneath

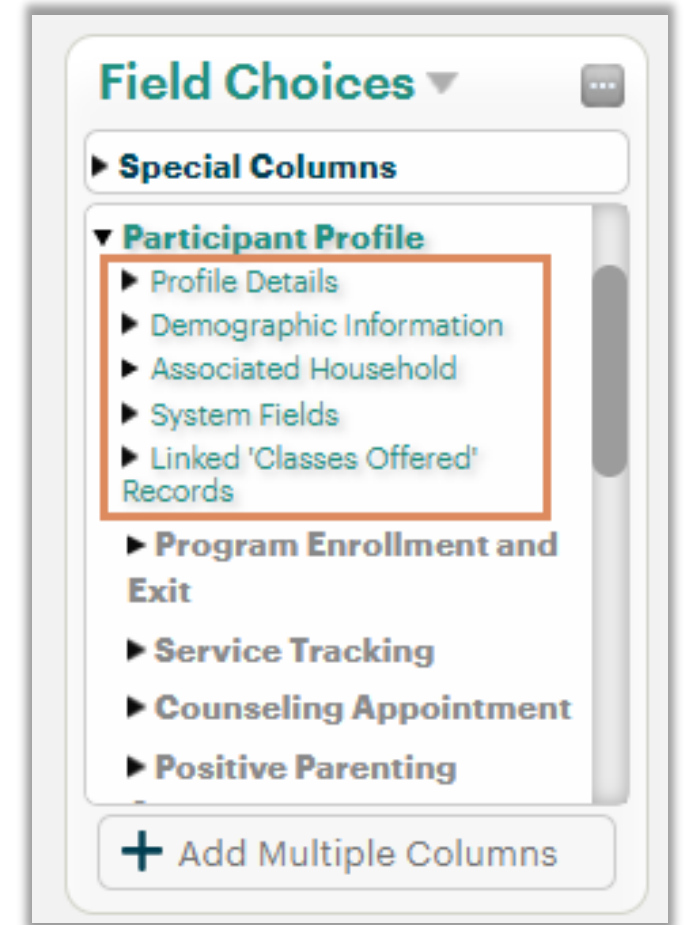


# Building Reports

Tier 1 Forms first

Tier 2 Forms underneath

Click Form to see form section



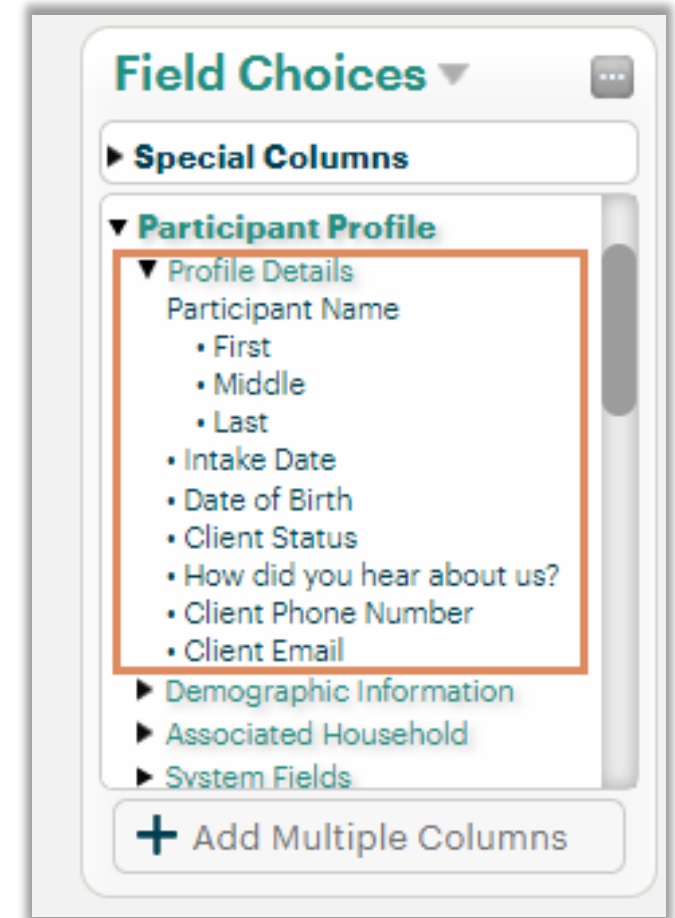
# Building Reports

Tier 1 Forms first

Tier 2 Forms underneath

Click Form to see form section

Click Form section to see fields



# Building Reports

Tier 1 Forms first

Tier 2 Forms underneath

Click Form to see form section

Click Form section to see fields

Drag field to report section to make column

Repeat as needed

**New Section**

▼ Forms  
Participant Profile (Always)

▼ Filters

▼ Limit Sections

Click to refresh data  
Auto run has been turned off for this section. Click here to turn it back on.

First	Last	Date of Birth	Client Status
...	...	...	...

**Field Choices**

► **Special Columns**

▼ **Participant Profile**

▼ Profile Details

- Participant Name
  - First
  - Middle
  - Last
- Intake Date
- Date of Birth
- Client Status
- How did you hear about us?
- Client Phone Number
- Client Email

► Demographic Information

► Associated Household

► System Fields

Add Multiple Columns

**Requirements**

All checks passed



# Building Reports

Autorun is Off by Default

Turn on to see preview

New Section ▾

▼ Forms

Participant Profile (Always)

▼ Filters +

▼ Limit Sections

Click to refresh data

Auto run has been turned off for this section. [Click here](#) to turn it back on.

First	Last	Date of Birth	Client Status
...	...	...	...

# Building Reports

Autorun is Off by Default

Turn on to see preview

Row Count not client count

The screenshot shows a report interface with a dark teal header containing a gear icon and the text "New Section". Below the header are three expandable sections: "Forms" (containing "Participant Profile (Always)"), "Filters", and "Limit Sections". The main content area displays the text "Report last run May 25th 2023, 4:19 pm" and "Click to refresh data" with a sub-note "Results limited to the first 10 Rows." Below this is a table with four columns: "First", "Last", "Date of Birth", and "Client Status". Each column header has a gear icon. The table lists 10 rows of data, with the last row containing "...". In the bottom right corner, a box highlights "Total Rows 65".

First	Last	Date of Birth	Client Status
Alicia	Henry	08/19/1965	Active
Alonzo	LaBatsille	03/04/1998	Active
Alonzo	LaBarca	04/03/1998	Active
Alvy	Singer	10/01/1978	Active
Andrew	Jones	05/16/1985	Active
Apple	Moore	01/19/1998	Active
April	Billingslea	04/15/1982	Active
Asher	Billingslea	06/09/1984	Active
Ashton	Carter	06/12/2003	Active
Austin	Hill	11/18/1997	Active
...	...	...	...

# Building Reports

- Will display all data by default
- Preview is limited
- Forms included in report listed under forms
- Can include data from multiple forms in one section.

New Section ▾

▼ Forms  
Incoming Referral (Always)

▼ Filters

▼ Limit Sections

Report last run May 25th 2023, 4:47 pm  
Click to refresh data  
Results limited to the first 10 Rows.

First	Last	Date of Birth	Intake Date
Adam	Voght	09/21/1987	04/29/2023
Alicia	Henry	08/19/1965	04/24/2023
Amara	Jones	11/02/1990	04/25/2023
Cat	Martin	02/23/2000	05/01/2023
Isabelle	Lopez	09/17/1986	05/02/2023
Maya	Anderson	10/09/1986	04/25/2023
Sharon	Matthews	03/06/1979	04/13/2023
...	...	...	...

Total Rows  
**7**

# Building Reports

- Data from multiple forms has AND condition by default.
- Only shows subjects with data in both forms
- Data shows **one row per record**
- Section counts rows by default **not** individuals

New Section ▾

▼ Forms  
Incoming Referral (Always)  
Outreach Form (Always)

▼ Filters

▼ Limit Sections

Report last run May 25th 2023, 4:45 pm  
Click to refresh data  
Results limited to the first 10 Rows.

First	Last	Date of Birth	Intake Date	Date	Method of Outreach	Results of Outreach
Adam	Voght	09/21/1987	04/29/2023	05/11/2023	Phone Call	Discuss client needs and goals, shared program details and answer questions
Adam	Voght	09/21/1987	04/29/2023	05/11/2023	In Person	Met to answer remaining questions and begin enrollment
Alicia	Henry	08/19/1965	04/24/2023	05/03/2023	Email	Email reach out with program details and call back number for questions
Alicia	Henry	08/19/1965	04/24/2023	05/11/2023	Phone Call	Discuss client needs and goals, shared program details and answer questions
Cat	Martin	02/23/2000	05/01/2023	05/11/2023	Phone Call	Discuss client needs and goals, shared program details and answer questions
Isabelle	Lopez	09/17/1986	05/02/2023	05/03/2023	Email	Email reach out with program details and call back number for questions
Isabelle	Lopez	09/17/1986	05/02/2023	05/11/2023	Phone Call	Discuss client needs and goals, shared program details and answer questions
Isabelle	Lopez	09/17/1986	05/02/2023	05/09/2023	Unsuccessful - Left Voice Mail	Follow Up screening call to see if they want to move forward. No answer. Left voicemail with details.
Maya	Anderson	10/09/1986	04/25/2023	05/09/2023	Unsuccessful - Left Voice Mail	Follow Up screening call to see if they want to move forward. No answer. Left voicemail with details.

# Formatting Reports

# Formatting Reports

- Change Section Properties
- Click Gear icon
- Change Section Name

The screenshot displays a software interface with a 'New Section' dropdown menu. A 'Section Properties' dialog box is open, showing various configuration options. The 'Section Name' field is set to 'New Section'. The 'Display Style' section includes radio buttons for 'Hidden', 'Graph Only', 'Totals', 'Rows' (selected), and 'Vertical'. The 'Count' section includes radio buttons for 'Total Rows' (selected), 'Incoming Referral Records', and 'Suppress Total Row Count'. The 'Show Graph' section includes radio buttons for 'No' (selected) and 'Yes'. The 'Show Outcomes' section includes radio buttons for 'No' (selected) and 'Yes'. The 'Show Percentages' section includes radio buttons for 'No' (selected) and 'Yes'. The 'Auto Run (Run Mode)' section includes radio buttons for 'No' and 'Yes' (selected). The 'Auto Run (Edit Mode)' section includes radio buttons for 'No' and 'Yes' (selected). The 'Basic SQL Statement' field is empty. At the bottom of the dialog are 'Delete', 'Copy', and 'Apply' buttons. An orange callout box points to the gear icon in the top right corner of the interface, with the text 'Click to open Section Properties'.

# Formatting Reports

- Change Section Count
- Rows (default)
- Number of Records
- Suppress Count

**Section Properties**

Section Name  
New Section

Display Style

- Hidden
- Graph Only
- Totals
- Rows
- Vertical

Count

- Total Rows
- Incoming Referral Records
- Suppress Total Row Count

Show Graph

- No
- Yes

Show Outcomes

- No
- Yes

Show Percentages

- No
- Yes

Auto Run (Run Mode)

- No
- Yes

Auto Run (Edit Mode)

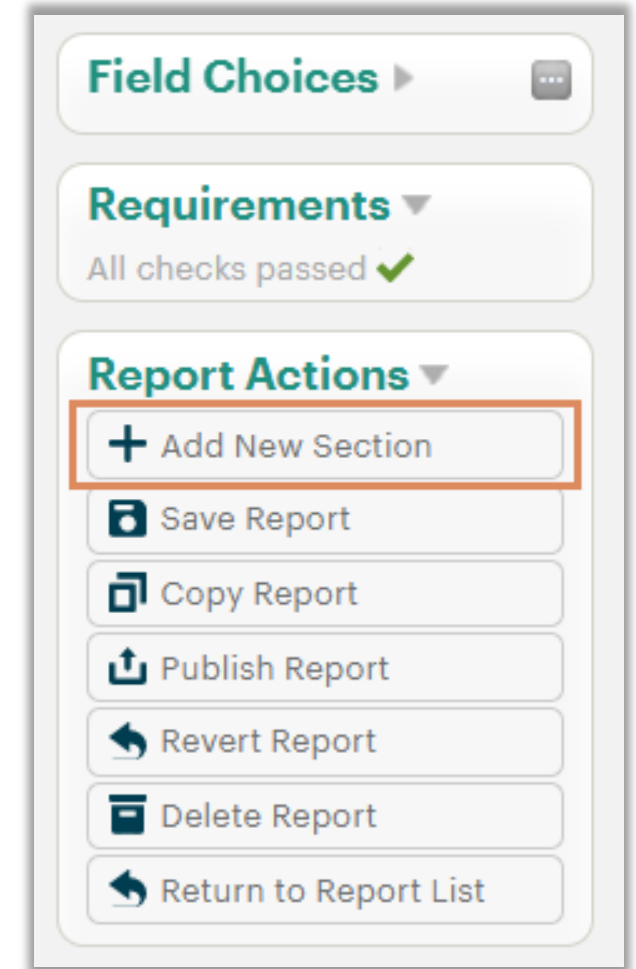
- No
- Yes

Basic SQL Statement ▶

Delete Copy Apply

# Formatting Reports

- Add New Sections as needed
- Sections are autonomous
- Help organize data sets



The image shows a vertical menu with several sections. The top section is 'Field Choices' with a right-pointing arrow and a three-dot menu icon. Below it is 'Requirements' with a downward arrow and the text 'All checks passed' followed by a green checkmark. The third section is 'Report Actions' with a downward arrow. This section contains a list of actions: '+ Add New Section' (highlighted with an orange border), 'Save Report' (with a floppy disk icon), 'Copy Report' (with a copy icon), 'Publish Report' (with an upward arrow icon), 'Revert Report' (with a circular arrow icon), 'Delete Report' (with a trash can icon), and 'Return to Report List' (with a circular arrow icon).



# Formatting Reports

- Copy existing section

**New Section** ▼ **Section Properties** [X]

Section Name  
New Section

Display Style

Hidden

Graph Only

Totals

Rows

Vertical

Count

Total Rows

Incoming Referral Records

Suppress Total Row Count

Show Graph

No

Yes

Show Outcomes

No

Yes

Show Percentages

No

Yes

Auto Run (Run Mode)

No

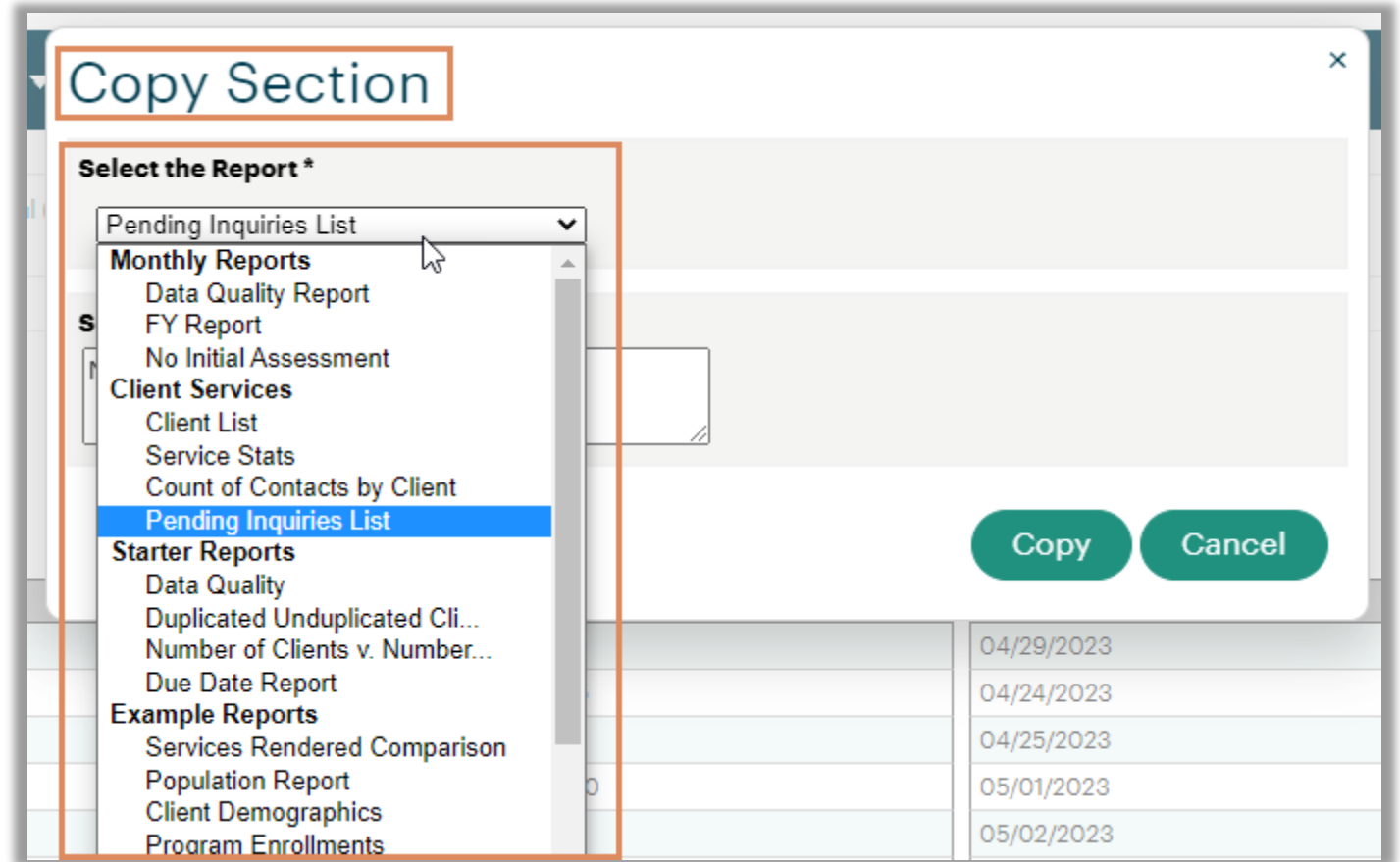
Yes

Basic SQL Statement ▶

Delete Copy Apply

# Formatting Reports

- Copy existing section
- To same or different report



# Formatting Reports

- Copy existing section
- To same or different report
- Saves Time

Pending Inquiries List

Global Values ▾ Add

Pending Inquiries w/ Contact ▶

Pending Inquiries NO Contact ▾

▼ Forms

Incoming Referral (Always)

Outreach Form (Never)

▼ Filters +

▼ Limit Sections

Report last run May 25th 2023, 5:03 pm  
[Click to refresh data](#)  
Results limited to the first 10 Rows.

First	Last	Date of Birth	Intake Date	Date
Amara	Jones	11/02/1990	04/25/2023	
Sharon	Matthews	03/06/1979	04/13/2023	
...	...	...	...	...

Total Rows

# Formatting Reports

- Column Gear shows column properties
- Delete to remove column

The screenshot displays a software interface for managing reports. The main window title is "Pending Inquiries NO Contact". A "Column Properties" dialog box is open, showing settings for the "Method of Outreach" column. The dialog box has a title bar with a close button and a "Name" field containing "Method of Outreach". It is divided into three sections: "Data Style" with radio buttons for Normal (selected), Text, Numeric, Custom Text, and Custom Numeric; "Summary" with radio buttons for No Summary (selected) and Count Distinct; and "Group By This Column" with radio buttons for No (selected) and Yes. Below these sections are expandable sections for "Formatting" and "Form Info". At the bottom of the dialog are "Delete" and "Apply" buttons, with the "Delete" button highlighted by an orange box. In the background, a table is visible with a column header "Method of Outreach" that has a gear icon highlighted by an orange callout bubble with the text "Click for column properties". The table shows two rows: "Amara" and "Sharon". A "Total Rows" box in the bottom right corner shows the number "2".

# Formatting Reports

- Column Properties
  - Name
  - Data Style
  - Summary
  - Formatting
  - Form Info
- Options vary by data type

**Column Properties**

Name: Monthly Income

Data Style:

- Normal
- Dollars
- Percent
- 2 Decimal
- Whole Number
- Custom Text
- Custom Numeric

Summary:

- No Summary
- Total
- Average
- Average (no zeroes)
- Minimum
- Maximum
- Count Distinct

Group By This Column:

- No
- Yes

**Formatting**

Sort:

- None
- Ascending
- Descending

Hidden:

- No
- Yes

Width: [ ] [reset]

Display Limit: None [reset]

Alignment:

- Left
- Center
- Right

Font Style:

- Normal
- Bold
- Italicized

Color: [ ] [reset]

**Form Info**

Delete Apply

# Formatting Reports

- Similar to sum feature in excel

The screenshot shows the 'Column Properties' dialog box for a column named 'Monthly Income'. The dialog is divided into several sections:

- Name:** Monthly Income
- Data Style:** Radio buttons for Normal (selected), Dollars, Percent, 2 Decimal, Whole Number, Custom Text, and Custom Numeric.
- Summary:** Radio buttons for No Summary (selected), Total, Average, Average (no zeroes), Minimum, Maximum, and Count Distinct.
- Group By This Column:** Radio buttons for No (selected) and Yes.
- Formatting:**
  - Sort:** Radio buttons for None (selected), Ascending, and Descending.
  - Hidden:** Radio buttons for No (selected) and Yes.
  - Width:** A text input field with a [reset] button.
  - Display Limit:** A text input field with 'None' and a [reset] button.
  - Alignment:** Radio buttons for Left (selected), Center, and Right.
  - Font Style:** Radio buttons for Normal (selected), Bold, and Italicized.
  - Color:** A color selection box with a [reset] button.
- Form Info:** A section with a right-pointing arrow.

At the bottom of the dialog are two buttons: 'Delete' and 'Apply'.

# Formatting Reports

- Similar to sum feature in excel
- Summaries display at bottom of the column

First	Last	Date of Birth	Monthly Income	Intake Date	Date	Method of Outreach	Results of Outreach
Adam	Voght	09/21/1987	\$1,275.00	04/29/2023	05/11/2023	Phone Call	Discuss client needs and goals, shared program details and answer questions
Adam	Voght	09/21/1987	\$1,275.00	04/29/2023	05/11/2023	In Person	Met to answer remaining questions and begin enrollment
Alicia	Henry	08/19/1965	\$2,000.00	04/24/2023	05/03/2023	Email	Email reach out with program details and call back number for questions
Alicia	Henry	08/19/1965	\$2,000.00	04/24/2023	05/11/2023	Phone Call	Discuss client needs and goals, shared program details and answer questions
Cat	Martin	02/23/2000	\$1,200.00	05/01/2023	05/11/2023	Phone Call	Discuss client needs and goals, shared program details and answer questions
Isabelle	Lopez	09/17/1986	\$975.00	05/02/2023	05/03/2023	Email	Email reach out with program details and call back number for questions
Isabelle	Lopez	09/17/1986	\$975.00	05/02/2023	05/11/2023	Phone Call	Discuss client needs and goals, shared program details and answer questions
Isabelle	Lopez	09/17/1986	\$975.00	05/02/2023	05/09/2023	Unsuccessful - Left Voice Mail	Follow Up screening call to see if they want to move forward. No answer. Left voicemail with details.
Maya	Anderson	10/09/1986	\$1,000.00	04/25/2023	05/09/2023	Unsuccessful - Left Voice Mail	Follow Up screening call to see if they want to move forward. No answer. Left voicemail with details.
...	...	...	...	...	...	...	...
			Average Monthly Income <b>\$1,297.22</b>				

# Formatting Reports

- Summary for text data shows number of options

The screenshot displays a 'Column Properties' dialog box for a column named 'Gender Identity'. The dialog box is open over a table. The 'Data Style' section has 'Normal' selected. The 'Summary' section has 'Count Distinct' selected. The 'Group By This Column' section has 'No' selected. The background table shows a summary row with the following data:

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Column 7	Column 8
Isabelle	Lopez	09/17/1986	...	Average Monthly Income	...	Distinct Gender Identity Values	...
Isabelle	Lopez	09/17/1986	...	\$1,297.22	...	4	...
Maya	Anderson	10/09/1986	...	...	...	...	...



# Formatting Reports

- Summary for text data shows number of options
- Use Group property to count by text data.

Pending Inquiries w/ Contact ▾

► Forms

▼ Filters +

▼ Limit Sections

Report last run May 25th 2023, 5:24 pm  
Click to refresh data

► Female	Incoming Referral Count	1
► Male	Incoming Referral Count	1
▼ Non Binary	Incoming Referral Count	2

Search  Q Displaying 2 of 2 Rows (Expand All Cells)

First ▾	Last ▾	Date of Birth ▾	Monthly Income ▾	Gender Identity ▾	Intake Date ▾	Date ▾	Method of Outreach ▾
Maya	Anderson	10/09/1986	\$1,000.00	Non Binary	04/25/2023	05/09/2023	Unsuccessful - Left Voice Mail
Cat	Martin	02/23/2000	\$1,200.00	Non Binary	05/01/2023	05/11/2023	Phone Call
			Average Monthly Income <b>\$1,100.00</b>				

► Transgender

Incoming Referral Count 1

# Publish and test

- Must publish to see full data set
- Run to ensure desired layout

ADMINISTRATOR

Success! Would you like to run this report?

Run Cancel

CHANGE

Sabrina Gilbert

### Pending Inquiries List

Global Values + Add

Pending Inquiries w/ Contact ⚙️

- ▼ Forms
  - Incoming Referral (Always)
  - Outreach Form (Always)
- ▼ Filters +
- ▼ Group Filters +
- ▼ Limit Sections

Report last run May 25th 2023, 5:24 pm  
Click to refresh data

#### COLLAPSE ALL

Field Choices ⋮

Requirements ▼  
All checks passed ✓

#### Report Actions ▼

- + Add New Section
- 📄 Save Report
- 📄 Copy Report
- 📄 Publish Report**
- ↶ Revert Report
- 🗑️ Delete Report
- ↶ Return to Report List

# 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.