

Apricot Managing Your Sites & Programs Webinar

We will begin shortly

Meet Your Trainer

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Training & Development Associate

Learning Objective

Share best practices for managing Sites and Programs so that Administrators can make informed decisions when managing and modifying the system.

Agenda

Site and Program
Structure

Managing Sites

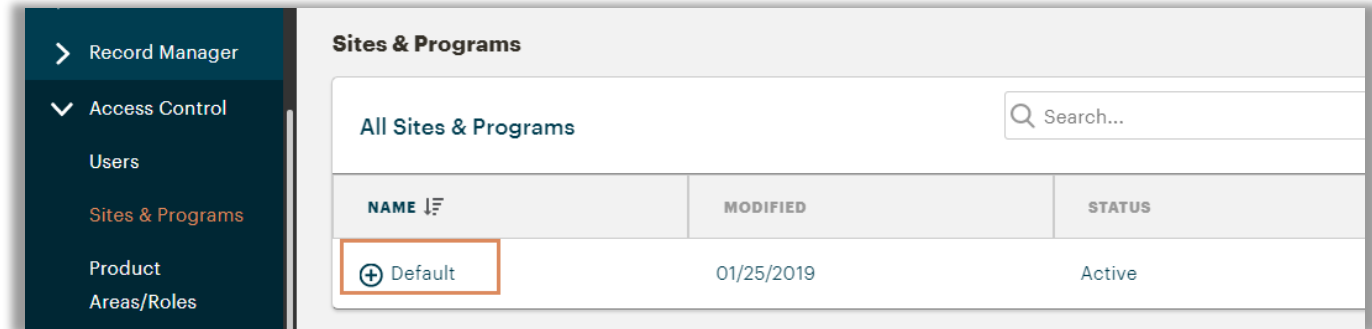
Managing Programs

Site & Program Structure

Site & Program Structure

Sites:

- Separate one group of programs from another
- Commonly used when orgs. have multiple locations
- Easily separate metrics of one location from another in reports
- Software comes with 1 Default site
- Add more as needed
 - Best Practice: Establish naming convention for consistency



The screenshot displays the 'Sites & Programs' management interface. On the left is a dark sidebar with navigation options: Record Manager, Access Control (expanded), Users, Sites & Programs (highlighted), Product, and Areas/Roles. The main content area is titled 'Sites & Programs' and features a search bar labeled 'All Sites & Programs' with a 'Search...' input field. Below the search bar is a table with columns for 'NAME', 'MODIFIED', and 'STATUS'. A single row is visible, representing the 'Default' site, which was modified on 01/25/2019 and is currently 'Active'. The 'Default' text in the table is enclosed in an orange border.

NAME ↓	MODIFIED	STATUS
⊕ Default	01/25/2019	Active

Site & Program Structure

Programs:

- Divide data by organizational programs
 - Forms
 - Clients
 - Reports

The image displays a side-by-side comparison of the Apricot CORE user interface for a participant named Aaron Anderson. The left interface is for the 'Program College Prep' site, and the right interface is for the 'Program Empowering Families' site. Both interfaces show a 'Search Records' menu with 'Participant Profile' highlighted. The right interface shows additional record types like 'Household Profile', 'Program Enrollment and Exit (0 records)', 'Individualized Service (0 records)', 'Counseling Appointment (0 records)', and 'Positive Parenting Assessment (0 records)'. The 'vs' label is placed between the two interfaces to indicate the comparison.

Site & Program Structure

Programs:

- Divide active clients from alumni
- Divide geographic locations within 1 state/region
- Distinguish different departments
- Distinguish program phases

Program Name (From Organization)	Brief Description	Corresponding Apricot Program
New Hope	Financial Literacy, Job Placement & Retention	New Hope Clients New Hope Alumni
Daily Bread	Food Pantry, Cooking Classes, Food Rescue	DB Brooklyn DB Queens
Teach a Man to Fish	ESL, GED, Vocational Classes, Tutoring, Job Search and Retention, Apricot.	Adult Education Workforce Development

Managing Sites

Managing Sites

Sites & Program Screen

1. Sites show in alphabetical order
2. Search for Site or Program by name
3. Create New Site button to create new Site
4. Click toggle next to Site to view programs
5. Click eye icon to view or edit Site details

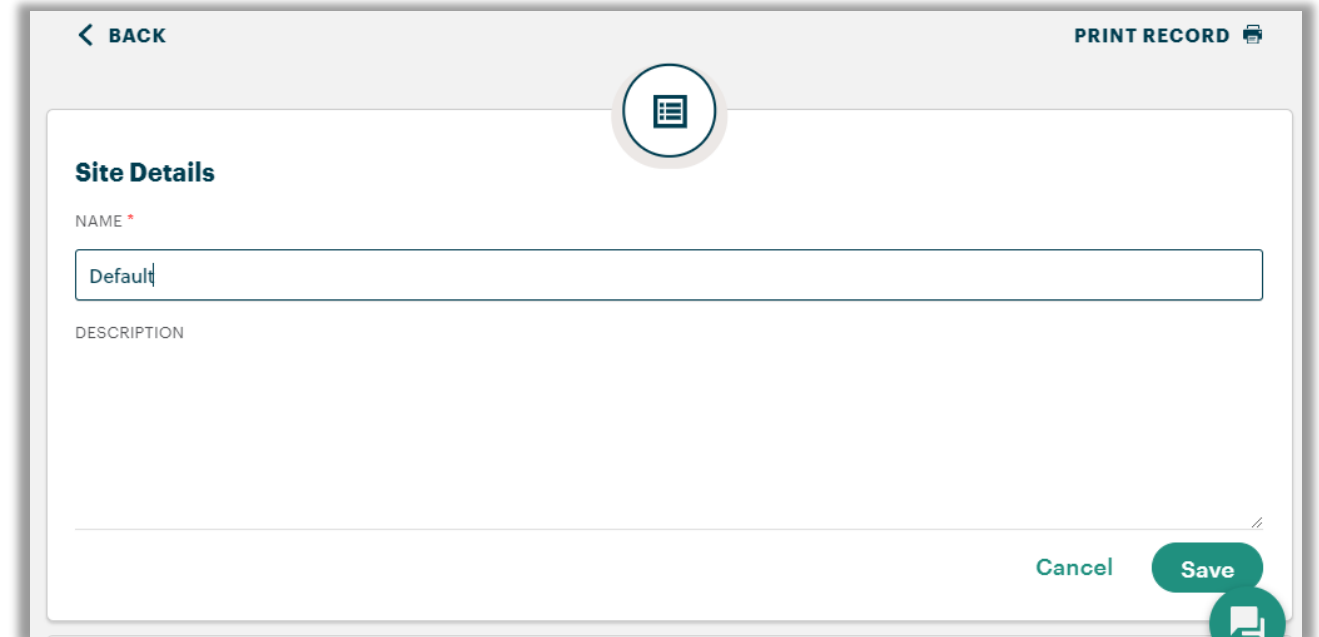
The screenshot shows the 'Sites & Programs' management interface. At the top, there is a search bar labeled 'Search by site...' (callout 2) and two buttons: 'Create New Site +' (callout 3) and 'Create New Program +'. Below the search bar is a toggle switch labeled 'All Sites & Programs' (callout 1). The main content is a table with columns for NAME, MODIFIED, and STATUS. The table lists several sites, with the 'Default' site highlighted by a callout 4. The 'Default' site has a toggle switch and an eye icon (callout 5). Other sites listed include Empowering Families, Donor Management, Volunteer User Permissions Template, Better Homes, Advocacy, Counseling, and College Prep. A chat icon with a notification badge is visible in the bottom right corner.

NAME	MODIFIED	STATUS
<input type="checkbox"/> Default	1/25/2019	Active
Empowering Families	1/29/2018	Active
Donor Management	6/13/2016	Active
Volunteer User Permissions Template	7/17/2017	Inactive
Better Homes	1/29/2018	Active
Advocacy	11/1/2017	Active
Counseling	1/29/2018	Active
College Prep	1/29/2018	Active

Managing Sites

Steps to Rename Your Default Site:

1. Click the eyeball icon to the right of the site
2. Click Update at the bottom right of the Site Details Section
3. Update the name and add desired details.
4. Click save to save your changes.



The screenshot shows a mobile application interface for editing a site. At the top, there is a navigation bar with a back arrow and the text "BACK" on the left, and "PRINT RECORD" with a printer icon on the right. Below the navigation bar is a circular icon containing a document symbol. The main content area is titled "Site Details". Underneath, there is a "NAME" field with a red asterisk, containing the text "Default". Below the name field is a "DESCRIPTION" field, which is currently empty. At the bottom right of the form, there are two buttons: "Cancel" and "Save". The "Save" button is highlighted in green and has a printer icon overlaid on it.

Managing Sites

Steps to Create a New Site:

1. Click the Create New Site button on the top right of the Sites & Programs page
2. Enter the appropriate information in the Site Details Section
3. Enter the Site Location.
4. Enter the Site Contact details
5. Click save to save your changes.

The screenshot shows a web form for creating a new site, divided into four numbered sections:

- Step 2: Site Details** (marked as Required): Includes a text input for NAME, a dropdown for STATUS (set to Active), and a text input for DESCRIPTION.
- Step 3: Site Location**: Includes a text input for STREET ADDRESS, dropdowns for CITY, STATE, and ZIP, and a dropdown for COUNTRY. A map placeholder is visible to the right.
- Step 4: Site Contact**: Includes text inputs for FIRST NAME, LAST NAME, and EMAIL.
- Step 5: SAVE SITE**: A green button at the bottom right of the form.

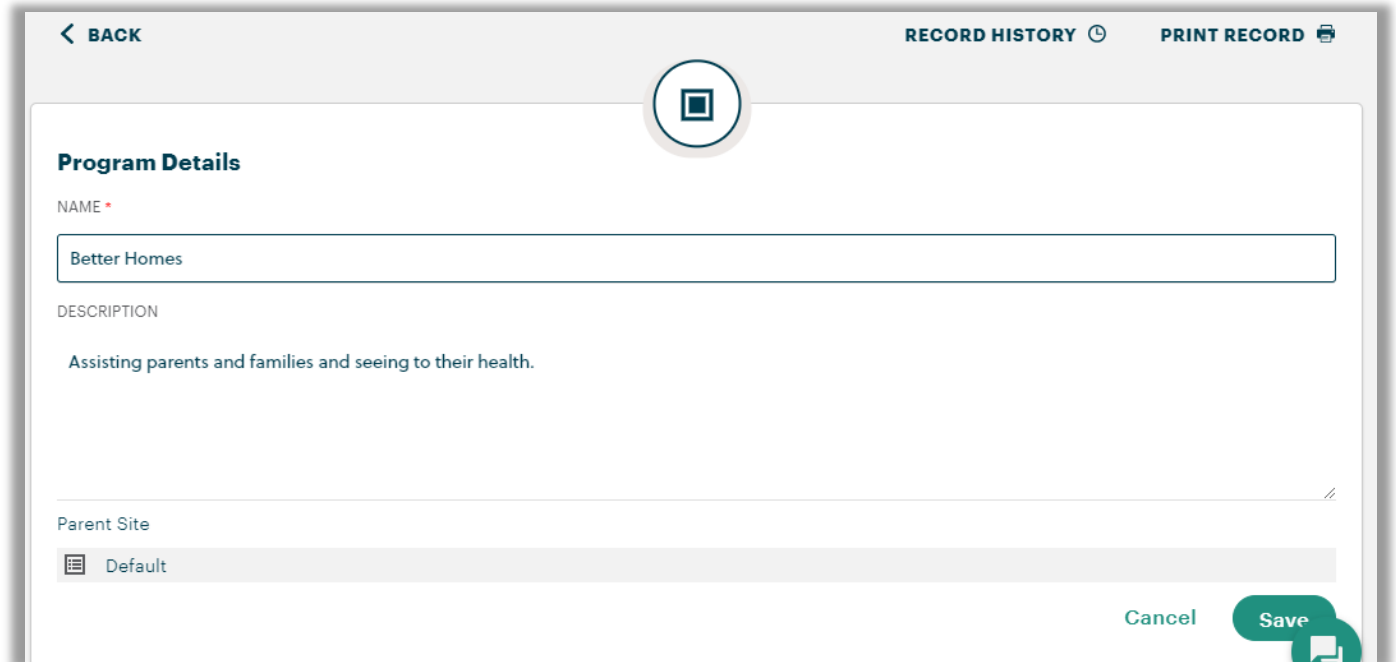
A 'CLEAR FIELDS' button is located between the Site Location and Site Contact sections.

Managing Programs

Managing Programs

Steps to Rename a Program

1. Click the eyeball icon next to the program
2. Click Update at the bottom of the Program Details section
3. Update the name and add desired details
4. Click Save



The screenshot shows a mobile application interface for editing a program. At the top, there is a navigation bar with a back arrow and the text 'BACK' on the left, and 'RECORD HISTORY' with a clock icon and 'PRINT RECORD' with a printer icon on the right. Below the navigation bar is a large circular icon containing a square, which is the 'eyeball' icon mentioned in the instructions. The main content area is titled 'Program Details'. It contains three sections: 'NAME' with a red asterisk, a text input field containing 'Better Homes'; 'DESCRIPTION' with a text area containing 'Assisting parents and families and seeing to their health.'; and 'Parent Site' with a dropdown menu showing 'Default'. At the bottom right of the form, there are two buttons: 'Cancel' and a green 'Save' button with a white checkmark icon.

Managing Programs

Steps to Create a New Program

1. Click Create New Program
2. Add Program Details and Assign to appropriate Site
3. Enter Program Location
4. Enter Program Contact
5. Enable Referrals (if needed)
6. Click Save

2 Program Details * Required

NAME

STATUS

DESCRIPTION

Which Site would you like this program to be under?

3 Program Location

STREET ADDRESS

CITY STATE ZIP

COUNTRY

CLEAR FIELDS

4 Program Contact

FIRST NAME

LAST NAME

EMAIL

6 SAVE PROGRAM

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.