



APRICOT REVIEW

B.C. CHARMS

Social Solutions Apricot is a cloud-hosted and open API case management solution designed for public sectors and non-profit organizations that offer social services.

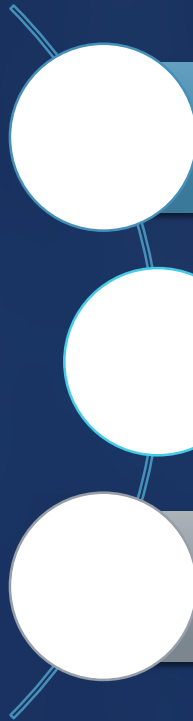
The software is a part of **Social Solutions**, a platform that offers tools to organizations to streamline programs and accelerate progress.

WHAT IS APRICOT?

APRICOT FEATURES

- Form designer
- workflow
- Security
- Reporting (Native & BI)

APRICOT FEATURES



Integration-ready

Full-featured administrative tools

Scalability

Complete control over the data model including:

- Drag and drop form designer for customizing data entry and screens
- Enforcing data entry logic
- Linking data elements within the platform
- Control over the architecture of your data model: Apricot lets you design your data model and as your data model evolves

FORM DESIGNER

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- Workflow builder
 - User dashboards
 - Custom linking data
 - Auto populate
 - Conditional logic
 - A workflow module providing progress indicators for either sequential or conditional order

WORKFLOW

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- Role-based permissions
 - Record-level access
 - Enterprise configuration
 - Administrator managed

It segments users by administrator capabilities: you can give separate report writers, separate data quality managers, separate evaluator managers, all accessing different parts of the database and the platform with different functionality and requirements.

SECURITY

(PROGRAMS, SITES, ROLES) FOR BOTH LOG IN AND WITHIN THE PLATFORM

-
- Native report builder
 - Native data visualizations
 - Batch export to Excel/CSV
 - SAP BusinessObjects Webi (also known as Apricot Results)

Apricot comes in with a native report builder, native visualizations, a batch report tool and SAP BusinessObjects Webi solution. It enables you to analyze data at any segmentation and any look at your data. They can be used as a template, so you don't have to rebuild reports every time.

NATIVE AND BI REPORTING

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- Web form
 - Client portal
 - Calendars
 - Imports – automations

It provides automation and integrated tools to support program management and service delivery, web deployable data collection forms, client portal allowing you to direct clients via text messages or email, integrated calendars for G Suite and Outlook, batch imports that can handle data files with thousands of rows of data.

INTEGRATION-READY

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- Application design
 - System administration
 - Data quality and assurance - self-service within license

There are no limitations on the design and deployment of the apricot platform. Apricot administrator back-end gives you 100% control over every facet of the software you don't need a super user or vendor supported solution to deploy and configure your platform.

FULL-FEATURED ADMINISTRATIVE CONTROL

you have the ability to design Apricot with a form designer, a report designer, you have business intelligence tools, data quality and assurance management tools, permissions and access requirements, the ability to import and export your data.

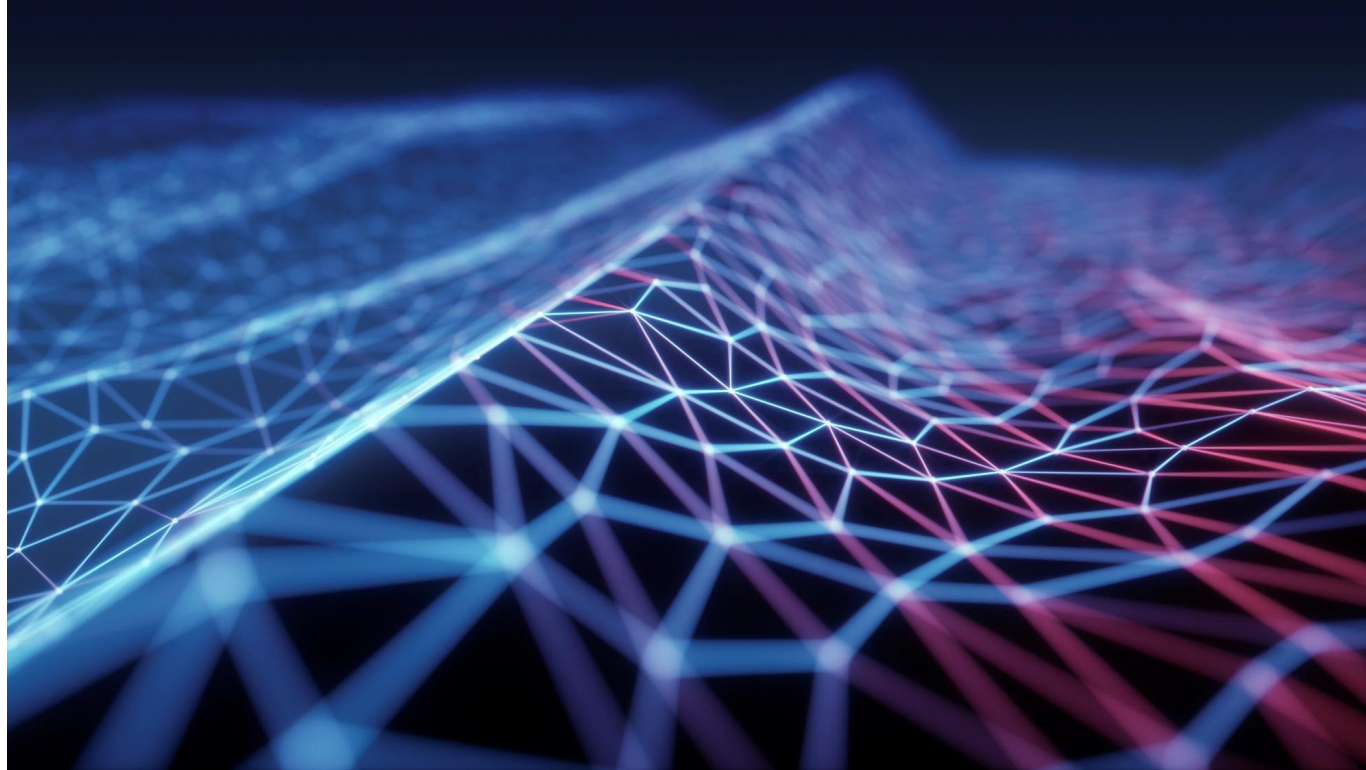
You can design workflows and use web deployed tools like the connect portal and web forms, you can update your data add or remove users.

FULL-FEATURED ADMINISTRATIVE CONTROL

-
- Multi-program/multi-site
 - Expand forms and reports
 - Import external data sets
 - Rapid deployment

Pairing the back-end access is the ability to scale the application within your license. You can build as many forms, user groups, reports and applications. As your program evolves, you can scale up the solution, add more users, and add more capability.

SCALABLE



PROS & CONS

1. Ease of Use

Data entry and navigation, drag and drop functions in the form designer and report designer

2. Flexibility

Track just about any type of data, customize with data entry forms and fields, scale up or down as needed,

PROS

3. Custom Reporting

drag and drop, filter-based reporting system, reports must be built from scratch for every new database, report on multiple data sets in the same report view, charts, graphs, and visualizations are customizable and dynamic.

They automatically update with new data based on the report criteria, advanced features like comparison reporting, first/last created filters, compound filters, outcomes and conditional formatting, custom expressions, grouping, and percentages among other features

PROS

5. User Administration

Organizes users into groups (departments, sites, cohorts), customizes permissions to specific features, limits user access to specific records, disables users, manages logins, and requires password conditions

6. A guest user module

Enhances engagement and communication with clients and volunteers

PROS

7. Accurate data management

It offers built-in data validation functionalities to ensure that forms are filled out, no duplicate data are found, and right data are entered

8. Integration

Google Calendar, Office 365, Gmail, MailChimp, Emma, ConstantContact

9. Customer service, technical support

The customer service cost is included in the cost of the software

PROS

I 0. Constantly upgrading the system

(free for the user)

I 1. Online training for staff

I 2. Web-based

Access Apricot from any computer

PROS

I 3. Workflow option

Helps ensure complete data collection
and a clean database

I 4. Ability to search by many fields, link related individuals, and prevention of duplicate participant profiles

PROS

CONS

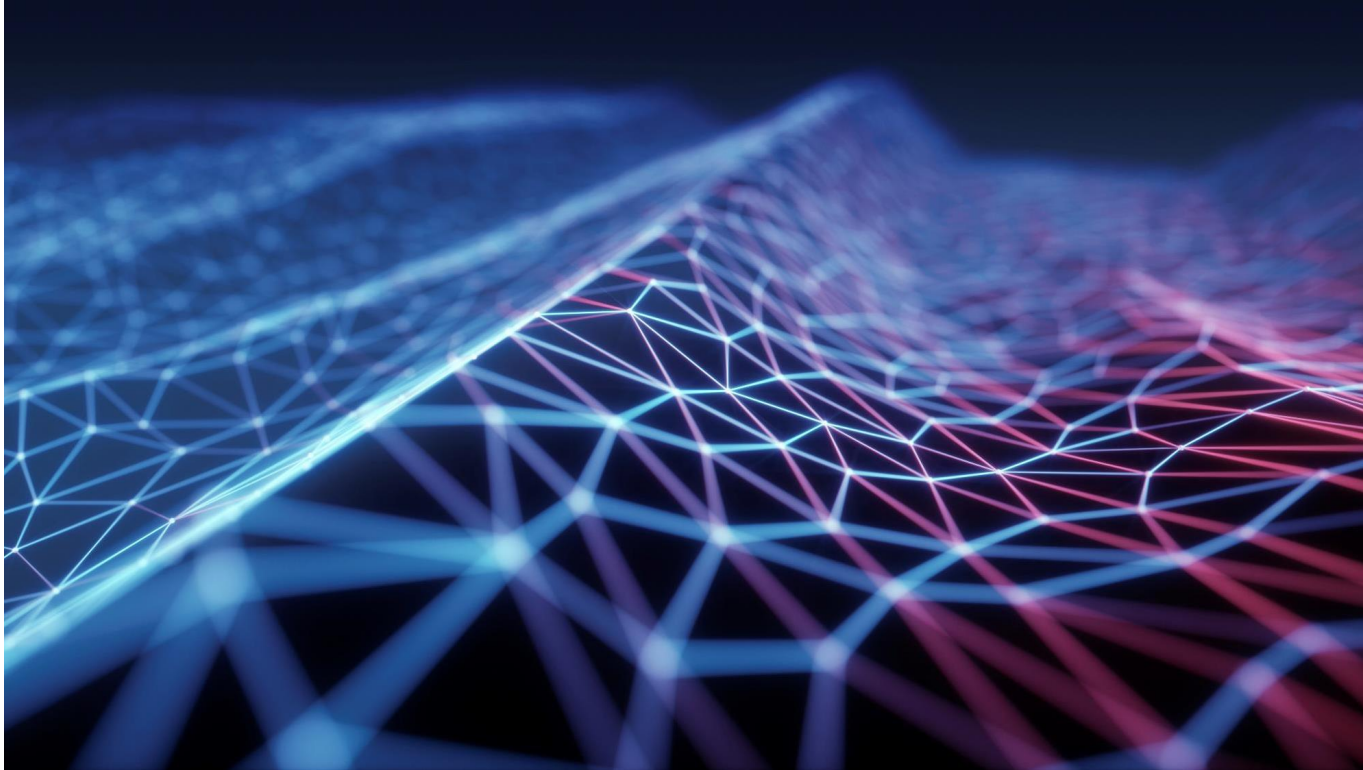
- You will need another platform for CRM work (The infrastructure is there under the hood, but not easily customizable to track various donor interactions, merge with mail chimp, etc)
- It works best in Google Chrome

CONS

- Some complaints (inconsistent) after the transition (CTK to Social Solutions):
The quality of customer service, pricing, bugs
- When first getting this software there is a lot of setting up and creating forms which does request a lot of alternation and time commitment.
- No mass emailing capability

CONS

- Not able to copy a profile's information (or parts of it) for related participants (e.g., siblings)
- Pricing not available (contract vendor).
- The reporting function could be more interactive once published. Currently, once a report is created and published, you can make minor modifications to see different results and compare data.



PRICING

PRICING

The total cost of ownership (TCO) includes customization, data migration, training, hardware, maintenance, upgrades, and more.

PRICING

- User interface changes
- Configurable dashboards
- Data elements required for tracking
- Forms to collect additional data
- Dashboard, management and operational reports that are needed.
- Workflows and how complex they are.
- Forms to collect additional data.

PRICING

(APRICOT REVEVANT)

- Minimal customization - integrate with 1-2 systems: \$2,500
- Standard customization - integrate with 3-5 systems: \$10,000
- Fully customized system - integrate with more than 5 systems: \$25,000



THANK YOU