

# Boone Impact Group Apricot Instructions

## *Proposal Submission Instructions*

### Table of Contents

Introduction.....	2
Section 1: Accessing the System .....	2
Section 2: Organization Profile .....	3
Section 3: Accessing Open RFPs.....	5
Section 4: Helpful Tips.....	5

### Contact Information

For questions or to report technical difficulties, please contact:

BIG Partner	Phone #	Email
Boone County Community Services Department	(573) 886-4298	communityservices@showmeboone.org
City of Columbia/Boone County Department of Public Health and Human Services	(573) 874-7488	humanservices@como.gov
City of Columbia Community Development Department	(573) 874-6321	planning@como.gov
Heart of Missouri United Way	(573) 443-4523	office@uwheartmo.org

**\*Apricot by Social Solutions will not be able to answer questions relating to RFP.**



## Introduction

The Boone Impact Group (BIG) utilizes a web-based funding management system, **Apricot by Social Solutions**, through which proposals for community-based funding must be submitted. These instructions are intended to assist organizations in accessing and create an organization profile in response to Requests for Proposals (RFPs) issued by the County, the City, or Heart of Missouri United Way. Please refer to specific RFP attachments for more information on completing program proposals.

## Section 1: Accessing the System

To access the system:

1. Copy and paste the following link to their internet web browser (preferably Google Chrome): <https://ctk.apricot.info/auth>

### PLEASE NOTE

Users **MUST** access the system using either Google Chrome (recommended) or Mozilla Firefox as the internet browser.

2. Enter Username and Password.



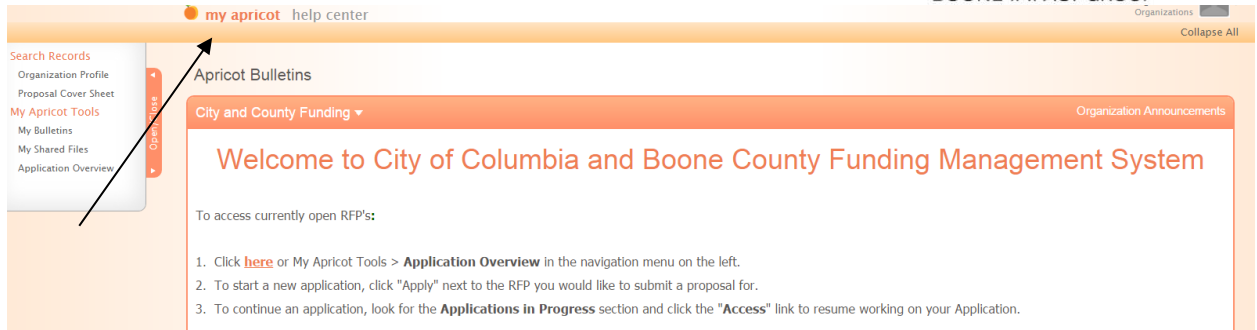
The screenshot shows the Apricot login interface. At the top is the 'apricot' logo with the tagline 'by ctk | software for nonprofits'. Below the logo is a 'Server/Location' dropdown menu currently set to 'Apricot.info (US)'. There are two input fields: one for 'Username' (placeholder: 'yourname@email.com') and one for 'Password'. A 'Login to Apricot' button is positioned below the fields. At the bottom of the form, there is a link for 'Forgot Your Password?' and a copyright notice: 'Copyright © 2007 Community TechKnowledge'.

### PLEASE NOTE

If your organization does not currently have an Apricot account, please contact the administrator of the RFP to which you are responding. Only one login is granted per organization and logins are valid for all sources of funding. (Boone County, City/County Department of Health and Human Services, and the Heart of Missouri United Way.)

3. Once you are logged in, you will be navigated to your **my apricot** page. This is one of the main pages users will utilize in navigating the system. Bulletins containing important information are also posted on this page.

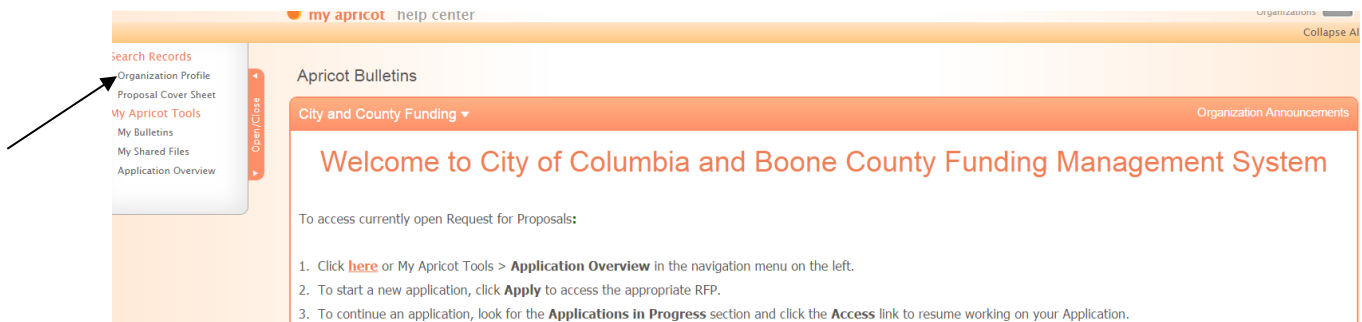




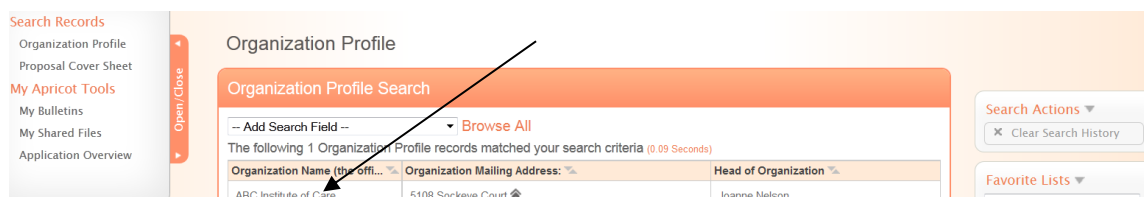
## Section 2: Organization Profile

To access and update your **Organization Profile**:

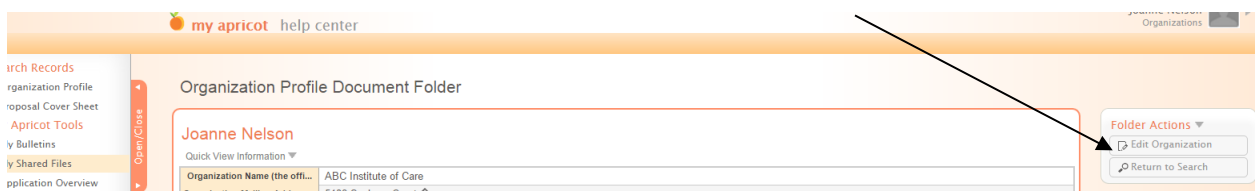
1. In the navigation menu on the left side of the screen, click on **Search Records: Organization Profile**



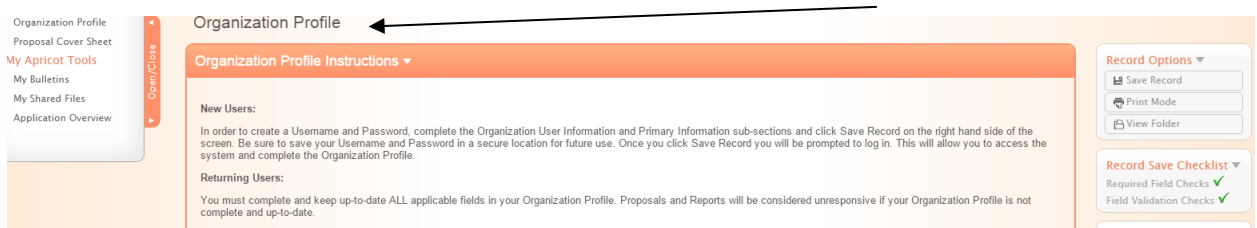
2. This will navigate you to your **Organization Profile** which contains an **Organization Profile Search** section in which your organization name is listed. Click on your organization's name.



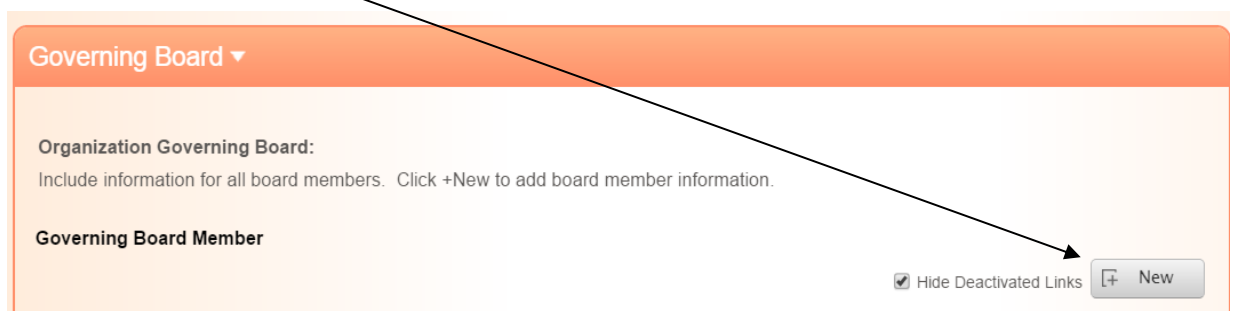
3. This will navigate you to your **Organization Profile Document Folder**. Click on **Edit Organization** in the **Folder Actions** box to access your **Organization Profile**.



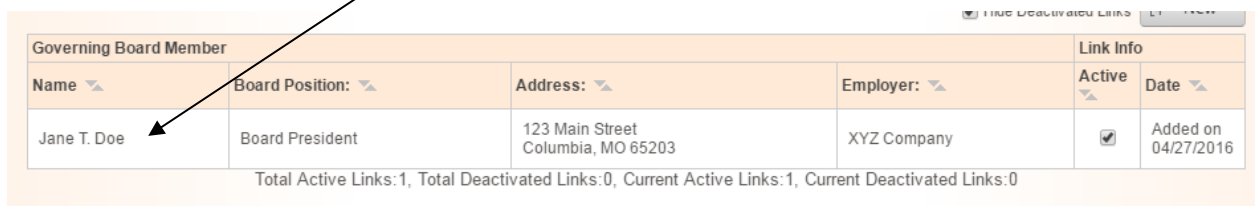
- The **Organization Profile** contains fields in which you will enter information and upload documents pertaining to your organization.



- The **Governing Board, Advisory Board, and Employee Compensation** sections each have sub-sections that will need to either be completed or updated. Click on the **New** tab when adding information.



Click on the individual's **Name** when updating any information.

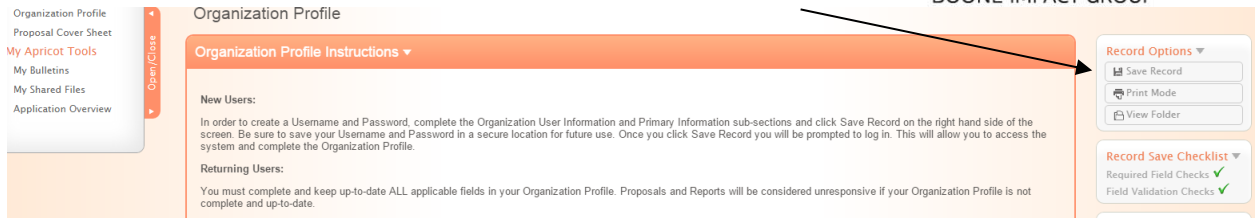


Once the information is updated make sure to click on the **Save Linked Record** tab in the **Record Options** box.



Click on the **Active** check mark when a Board member or an employee is no longer associated with the organization. There is no delete button.

- To save the information you have entered in your Organization profile, click **Save Record** under **Record Options** as you work on completing these fields and when it is complete.



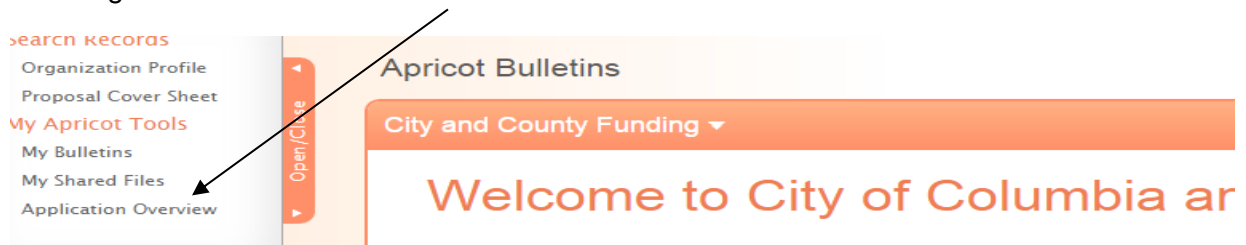
### IMPORTANT REMINDER

All sections and sub-sections of the **Organization Profile** **MUST** be completed or updated before submitting a proposal. Due to the requirements in the funding management system, there are some sections and sub-sections that are not marked required but **MUST** be completed. Please do not utilize the green check marks, in the Record Save Checklist box, as a guide to completeness. Proposals will be considered unresponsive if any applicable fields are incomplete. Do not hesitate to contact the funder if there are questions.

## Section 3: Accessing Open RFPs

This section provides instructions for viewing and accessing any open RFPs.

1. To see if there are any open RFPs, click on the **Application Overview** in the white navigation menu on the left side of the screen.



2. This will navigate you to the **Application Overview** page which will list any **Available** (open) RFPs. Click on the **Apply** hyperlink for the applicable RFP to access a **Proposal Cover Sheet**.



Children's Services Fund - Youth Homelessness Programs - RFP ▾

<b>Description</b>	NEW - Youth Homelessness Programs
<b>Enrollment End Date</b>	04/25/2017 8:00 AM CDT
<b>Status</b>	Open - <a href="#">Click Here to Apply</a>

## Section 4: Helpful Tips

1. Printing records – The ability to print is found under the **Folder Actions** box on the right-hand of the screen under **Print Records**. Follow instructions to print one or more forms.

Proposal Cover Sheet Document Folder

ABC Institute of Care

Quick View Information ▾

Organization Name (will aut...	ABC Institute of Care
Fund Source	Children's Services Fund - POS

**Folder Actions** ▾

[Edit Proposal Cover](#)

[Return to Search](#)

[Application Overview](#)

[Print Records](#)

2. Submitting additional proposals – If you wish to submit more than one proposal, click on **Application Overview** to access **Available RFPs**. Scroll down to the proposal and click on the **Apply** button to start the proposal submission process again.

Children's Services Fund - Youth Homelessness Programs - RFP ▾

<b>Description</b>	NEW - Youth Homelessness Programs
<b>Enrollment End Date</b>	04/25/2017 8:00 AM CDT
<b>Status</b>	Open - <a href="#">Click Here to Apply</a>

Proposal Cover Sheet Applications

Access	Organization Name (will auto-populate)	Fund Source	Funder	Funding Cycle	Name of Program or Project	Amount of Request	Record Lock
<a href="#">View</a>	testOrganization1	Children's Services Fund - Youth Homelessness Programs	Boone County	RFP #18-25APR17	xxx	\$10.00	

3. Applications in progress – Click on **Application Overview**, scroll down to the RFP you want to access and then click on the “View” on the left hand side of the RFP information box.

Children's Services Fund - Youth Homelessness Programs - RFP ▾

<b>Description</b>	NEW - Youth Homelessness Programs
<b>Enrollment End Date</b>	04/25/2017 8:00 AM CDT
<b>Status</b>	Open - <a href="#">Click Here to Apply</a>

Proposal Cover Sheet Applications

Access	Organization Name (will auto-populate)	Fund Source	Funder	Funding Cycle	Name of Program or Project	Amount of Request	Record Lock
<a href="#">View</a>	testOrganization1	Children's Services Fund - Youth Homelessness Programs	Boone County	RFP #18-25APR17	xxx	\$10.00	

4. Symbols – below are common symbols utilized in **Apricot by Social Solutions**.



- a. \* = Required Field
- b. ▼ = Open or close viewing of forms.
- c. ? = Tool Tip: If the cursor hovers over this it will information about that specific request or requirement.
- d. ✓ = This green check mark does not necessarily indicate that a form is complete. Due to the system requirements, some sections, and sub-sections may have information not marked as required but must be completed.
- e. ✗ = Indicates that a form is incomplete.
- f. ☰ = Enables users to see section values in the **Additional Documents** section.

