




Welcome to Bloomerang Academy

Thank you for joining us!

Please drop into the chat and tell us where you are joining us from
and what the weather is like where you are!



Housekeeping

Live Transcript

We all know what we want to do is spend
administration and more time Doing the w

Hide Subtitle

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Subtitle Settings...



Chat



Raise Hand



Q&A



Live Transcript

Share ideas

Ask questions

Housekeeping

Dial in audio access: **+1 669 900 6833**

We will share the slides and recording of this session with you via email later today.

Any questions we are not able to answer live or in the Q&A will be addressed after the session via a follow-up.

If you need further assistance, please reach out to support@bloomerang.com. Our support team is amazing!

Letters Part 1



What will we cover today?



1. **NCOA Processing**
 - a. How to turn it on
 - b. Address Updates
 - c. Deceased Suppression
2. **Letters**
 - a. Getting Started–Letters home page
 - b. Steps to creating a letter
 - c. Basic editing and formatting
 - d. Printing and editing letters
 - e. Reporting on a letter send
3. **Demo and Q&A**

Drop in the chat...When does your organization create and send letters?

- Acknowledgement
- Impact/cultivation
- Solicitations
- Tributes
- Tax documents
- Special invitation
- And so many more....

15 Odd Things That Make Direct Mail Fundraising Appeals Successful

#2. Good direct mail appeals have a few standard components. They always have “entertainment value” (often a story, or intimacy: **“Let me take you into my world.”**); **that’s what keeps people reading.**

#4. **“You”** is the most important word. It is classed among the top 20 or so “power words” in advertising because of its magical ability to raise more money.

#7. You wear your heart on your sleeve. Sounding corporate or technical will not raise as much money as **sounding warm and welcoming.**

#14. Certain phrases, like **“tax-deductible” (which reminds readers that you’re a true charity), are repeated often,** so they won’t be missed.

**Check out the article
(linked above in the title) to
see more tips! And join us
Thursday for [Letters Part 2!](#)**

Direct mail

Some pros and cons

The pros:

- *Direct mail is easy to write.
- *It makes it easier to connect with individuals.
- *You can keep track of direct mail.
- *You can share important details.

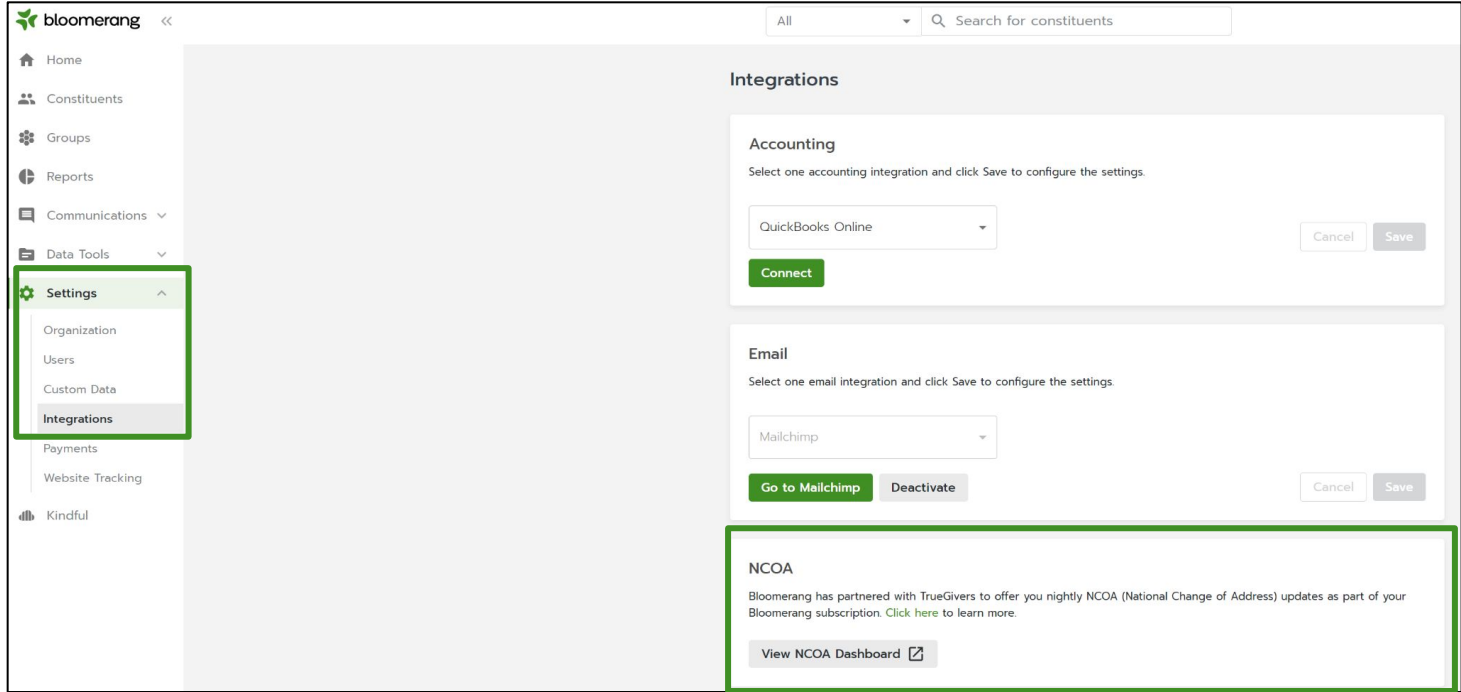
And the cons:

- *Direct mail can come off as impersonal.
- *You might miss out on other giving opportunities.
- *Direct mail can get expensive.

Where do I start?

First, turn on NCOA processing.

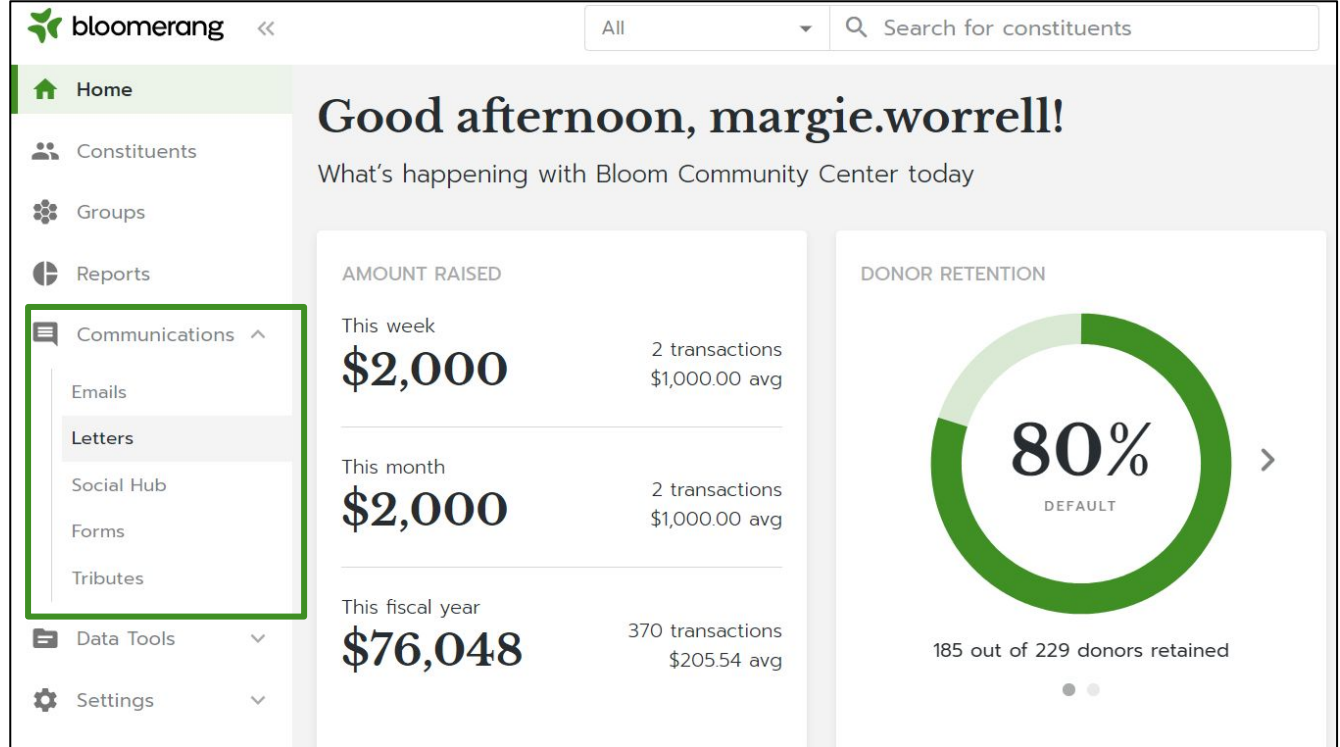
If you do not see it, check with your admin or reach out to a customer success team member at customersuccess@bloomerang.com.



The screenshot shows the Bloomerang user interface. On the left is a navigation sidebar with the following items: Home, Constituents, Groups, Reports, Communications, Data Tools, Settings (highlighted with a green box), Organization, Users, Custom Data, Integrations (highlighted with a green box), Payments, Website Tracking, and Kindful. The main content area is titled "Integrations" and contains three sections: "Accounting" (with a dropdown menu set to "QuickBooks Online" and a "Connect" button), "Email" (with a dropdown menu set to "Mailchimp" and "Go to Mailchimp" and "Deactivate" buttons), and "NCOA" (highlighted with a green box). The "NCOA" section contains the text: "Bloomerang has partnered with TrueGivers to offer you nightly NCOA (National Change of Address) updates as part of your Bloomerang subscription. [Click here to learn more.](#)" and a button labeled "View NCOA Dashboard" with an external link icon.

Where do I start?

On the left-side navigation bar, click Communications then click Letters.



The screenshot shows the Bloomerang dashboard. On the left is a navigation bar with the following items: Home, Constituents, Groups, Reports, Communications (highlighted with a green box), Data Tools, and Settings. The Communications menu is open, showing sub-items: Emails, Letters (highlighted with a grey bar), Social Hub, Forms, and Tributes. The main content area features a greeting: "Good afternoon, margie.worrell!" and "What's happening with Bloom Community Center today". Below this are two panels: "AMOUNT RAISED" and "DONOR RETENTION".

Period	Amount Raised	Transactions	Average
This week	\$2,000	2 transactions	\$1,000.00 avg
This month	\$2,000	2 transactions	\$1,000.00 avg
This fiscal year	\$76,048	370 transactions	\$205.54 avg

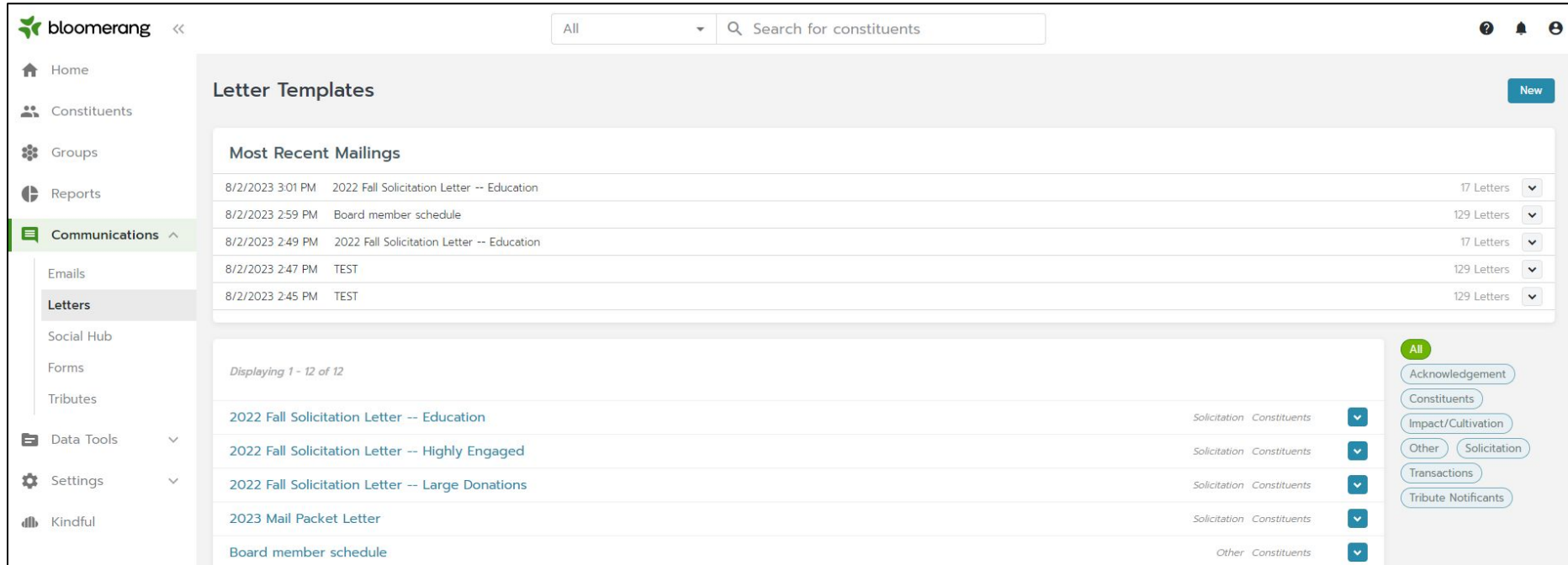
DONOR RETENTION

80%
DEFAULT

185 out of 229 donors retained

Letters home page

Lots to see here!



The screenshot shows the Bloomerang interface for the Letters home page. On the left is a navigation sidebar with options: Home, Constituents, Groups, Reports, Communications (expanded), Emails, Letters (selected), Social Hub, Forms, Tributes, Data Tools, Settings, and Kindful. The main content area is titled "Letter Templates" and includes a search bar, a "New" button, and a "Most Recent Mailings" table. Below the table is a list of letter templates with filters on the right.

Most Recent Mailings		
8/2/2023 3:01 PM	2022 Fall Solicitation Letter -- Education	17 Letters
8/2/2023 2:59 PM	Board member schedule	129 Letters
8/2/2023 2:49 PM	2022 Fall Solicitation Letter -- Education	17 Letters
8/2/2023 2:47 PM	TEST	129 Letters
8/2/2023 2:45 PM	TEST	129 Letters

Letter Template	Category	Target	Action
2022 Fall Solicitation Letter -- Education	Solicitation	Constituents	Filter
2022 Fall Solicitation Letter -- Highly Engaged	Solicitation	Constituents	Filter
2022 Fall Solicitation Letter -- Large Donations	Solicitation	Constituents	Filter
2023 Mail Packet Letter	Solicitation	Constituents	Filter
Board member schedule	Other	Constituents	Filter

Filters: All, Acknowledgement, Constituents, Impact/Cultivation, Other, Solicitation, Transactions, Tribute Notificants

Letters home page

The screenshot shows the Bloomerang Letters home page. A sidebar on the left contains navigation options: Home, Constituents, Groups, Reports, Communications (expanded), Emails, Letters (selected), Social Hub, Forms, Tributes, Data Tools, Settings, and Kindful. The main content area is titled "Letter Templates" and "Most Recent Mailings". A "Delete Mailing" dialog box is open, asking for confirmation to delete a mailing. A dropdown menu is open, showing options like "Download Letters", "Download Addresses", "Download Envelopes", "Download Labels", and "Delete". A "New" button is visible in the top right. A "Filter" dropdown is set to "All".

Most recent mailings

Date/Time	Subject	Count
8/2/2023 3:01 PM	2022 Fall Solicitation Letter -- Education	17 Letters
8/2/2023 2:59 PM	Board member schedule	129 Letters
8/2/2023 2:49 PM	2022 Fall Solicitation Letter -- Education	17 Letters
8/2/2023 2:47 PM	TEST	129 Letters
8/2/2023 2:45 PM	TEST	129 Letters

Other previous letters you can use as templates

Letter Title	Category
2022 Fall Solicitation Letter -- Education	Constituents
2022 Fall Solicitation Letter -- Highly Engaged	Solicitation Constituents
2022 Fall Solicitation Letter -- Large Donations	Solicitation Constituents
2023 Mail Packet Letter	Solicitation Constituents
Board member schedule	Other Constituents

Filter: All

- Acknowledgement
- Constituents
- Impact/Cultivation
- Other
- Solicitation
- Transactions
- Tribute Notificants

Letters home page

You can edit, copy or preview previous letters. To use your letter as a template, copy it and rename it, create new filters to match your audience.

Displaying 1 - 12 of 12

2022 Fall Solicitation Letter -- Education

Solicitation Constituents



2022 Fall Solicitation Letter -- Highly Engaged

Solic

Edit 

2022 Fall Solicitation Letter -- Large Donations

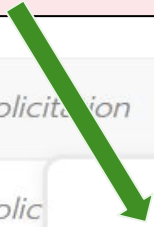
Solic

Copy 

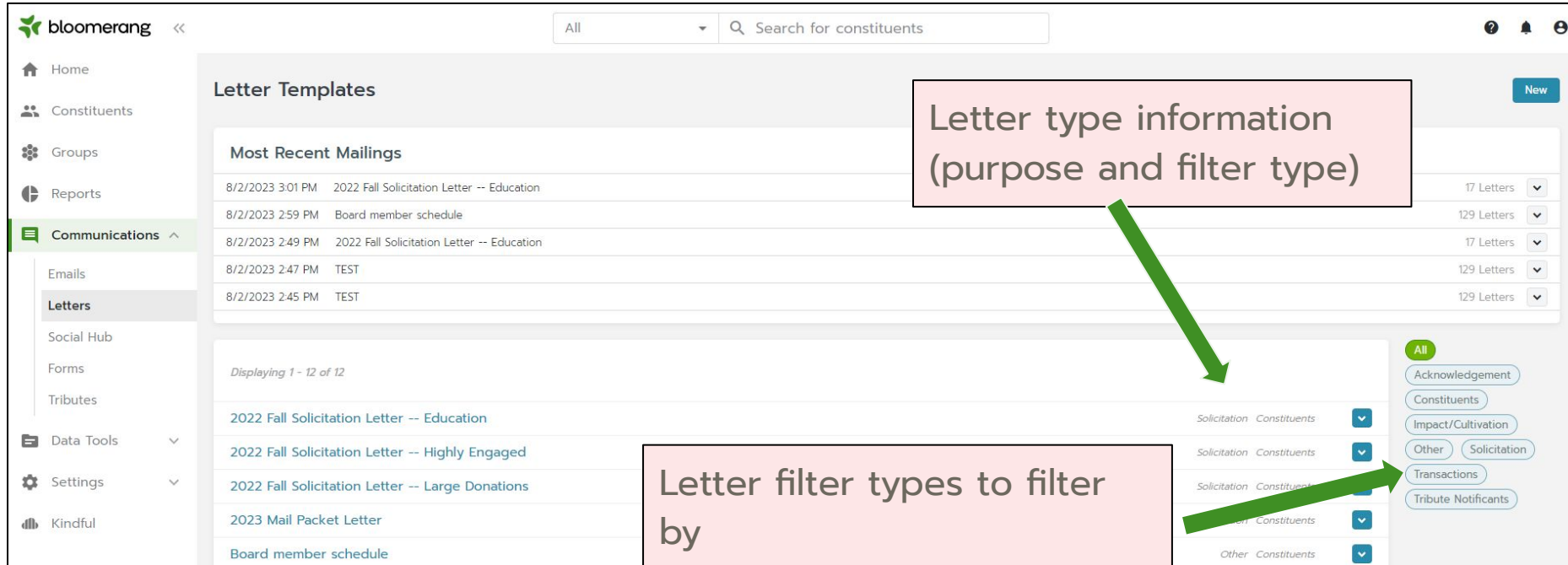
2023 Mail Packet Letter

Solic

Preview 



Letters home page



The screenshot shows the Bloomerang interface for managing letters. On the left is a navigation sidebar with options: Home, Constituents, Groups, Reports, Communications (selected), Emails, Letters (highlighted), Social Hub, Forms, Tributes, Data Tools, Settings, and Kindful. The main content area is titled "Letter Templates" and features a search bar at the top with "All" selected and a search input field containing "Search for constituents". Below the search bar is a "Most Recent Mailings" table with columns for date, time, subject, and a dropdown menu showing the number of letters (e.g., 17 Letters, 129 Letters). A pink callout box with the text "Letter type information (purpose and filter type)" has a green arrow pointing to the "Solicitation" and "Constituents" labels in the table. Below the table, a filter panel is visible with a dropdown menu showing "All" selected and a list of filter types: Acknowledgement, Constituents, Impact/Cultivation, Other, Solicitation, Transactions, and Tribute Notificants. A second pink callout box with the text "Letter filter types to filter by" has a green arrow pointing to the "Solicitation" filter type in the panel.

Date	Time	Subject	Filter Type	Count
8/2/2023	3:01 PM	2022 Fall Solicitation Letter -- Education	Solicitation Constituents	17 Letters
8/2/2023	2:59 PM	Board member schedule	Solicitation Constituents	129 Letters
8/2/2023	2:49 PM	2022 Fall Solicitation Letter -- Education	Solicitation Constituents	17 Letters
8/2/2023	2:47 PM	TEST	Solicitation Constituents	129 Letters
8/2/2023	2:45 PM	TEST	Solicitation Constituents	129 Letters

Displaying 1 - 12 of 12

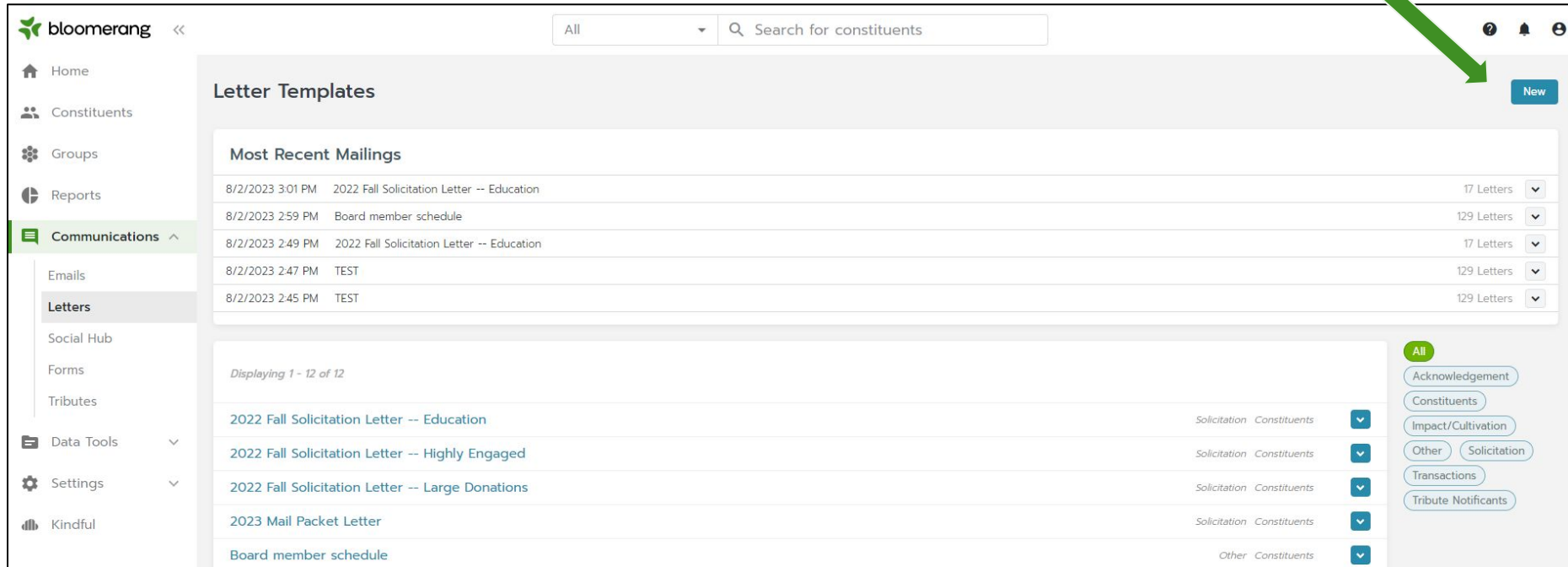
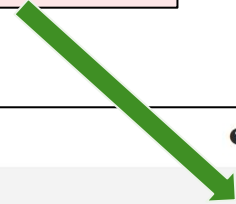
Letter Title	Filter Type
2022 Fall Solicitation Letter -- Education	Solicitation Constituents
2022 Fall Solicitation Letter -- Highly Engaged	Solicitation Constituents
2022 Fall Solicitation Letter -- Large Donations	Solicitation Constituents
2023 Mail Packet Letter	Solicitation Constituents
Board member schedule	Other Constituents

Filter Panel:

- All
- Acknowledgement
- Constituents
- Impact/Cultivation
- Other
- Solicitation
- Transactions
- Tribute Notificants

Letters home page

Or start a new letter here!



The screenshot shows the Bloomerang Letters home page. At the top, there is a navigation bar with the Bloomerang logo, a dropdown menu set to 'All', and a search bar labeled 'Search for constituents'. On the right side of the navigation bar are icons for help, notifications, and user profile. A sidebar on the left contains navigation options: Home, Constituents, Groups, Reports, Communications (expanded), Emails, Letters (selected), Social Hub, Forms, Tributes, Data Tools, Settings, and Kindful. The main content area is titled 'Letter Templates' and features a 'New' button in the top right corner. Below this is a section for 'Most Recent Mailings' with a table of recent mailings. At the bottom, there is a list of letter templates with filters for 'Solicitation' and 'Constituents'. A filter panel on the right side of the template list includes buttons for 'All', 'Acknowledgement', 'Constituents', 'Impact/Cultivation', 'Other', 'Solicitation', 'Transactions', and 'Tribute Notificants'.

Time	Subject	Count
8/2/2023 3:01 PM	2022 Fall Solicitation Letter -- Education	17 Letters
8/2/2023 2:59 PM	Board member schedule	129 Letters
8/2/2023 2:49 PM	2022 Fall Solicitation Letter -- Education	17 Letters
8/2/2023 2:47 PM	TEST	129 Letters
8/2/2023 2:45 PM	TEST	129 Letters

Template Name	Category	Filter
2022 Fall Solicitation Letter -- Education	Solicitation	Constituents
2022 Fall Solicitation Letter -- Highly Engaged	Solicitation	Constituents
2022 Fall Solicitation Letter -- Large Donations	Solicitation	Constituents
2023 Mail Packet Letter	Solicitation	Constituents
Board member schedule	Other	Constituents

How to start a new letter

Choose how you are filtering your letter

New Letter

Step 1/2

How are you filtering your audience?

Constituents

Use this to create:

- Profile-based solicitations
- Newsletters

Select

Transactions

Use this to create:

- Acknowledgements
- Receipts
- Pledge reminders

Select

Interactions

Use this to create:

- Event confirmations
- Volunteer acknowledgements

Select

Tribute Notificants

Tribute Notificant letters for:

- "In Memory Of" survivors
- "In Honor Of" honorees

Select

Name and Purpose for letter

New Letter

Describe Your Letter

Name

Purpose

Create One Letter Per

Allow Blank Merge Fields?

Allow Bad, Incomplete, or Missing Addresses?

- Acknowledgement
- Impact/Cultivation
- Newsletter
- Receipt
- Solicitation
- Special Event
- Volunteer Activity
- Pledge Reminder
- Welcome
- Other

Use a name which makes sense to you—it's internal only.

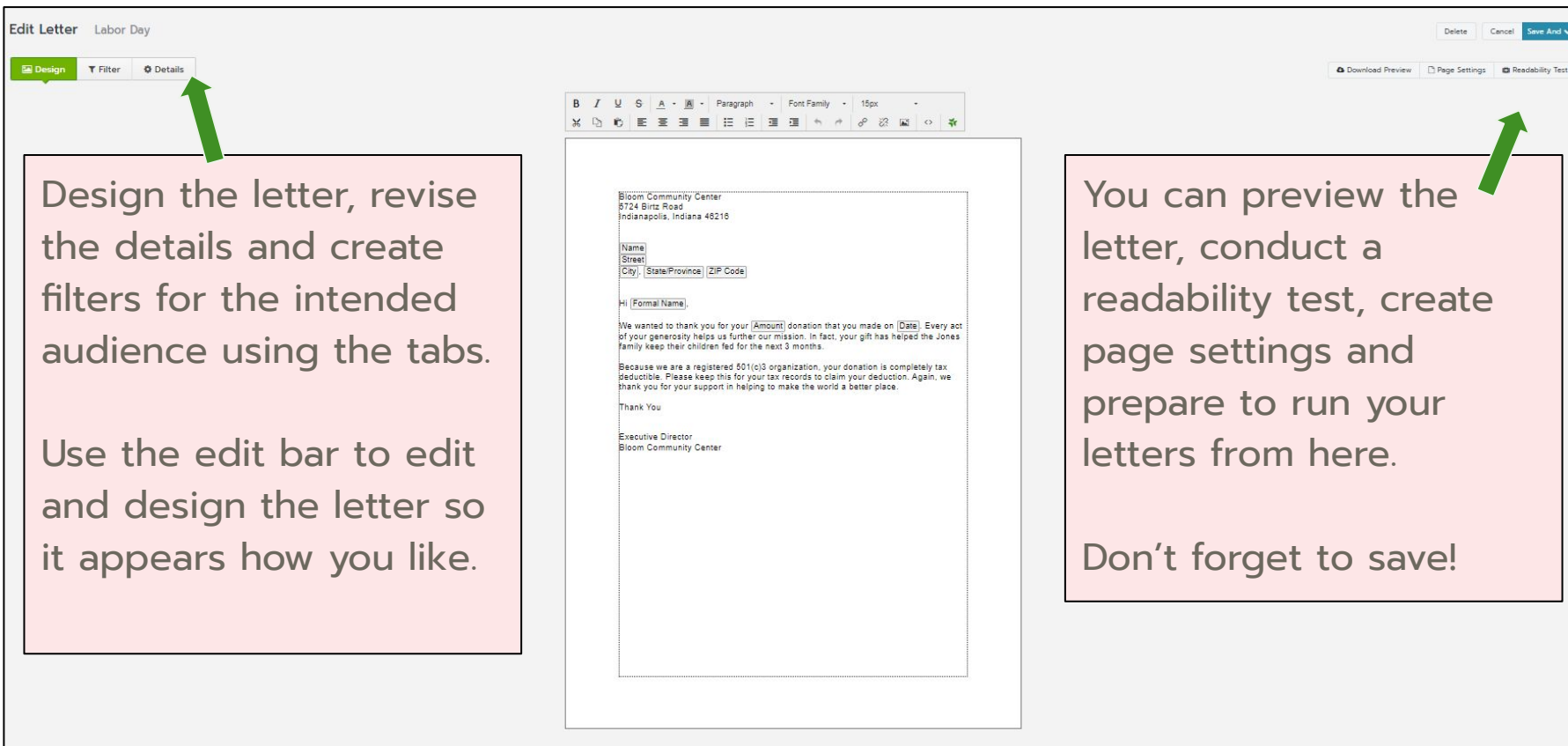
Creating one letter per household keeps you from sending multiple letters to the same address.

Do not allow blank merge fields or bad addresses for most mailings.

Prev

Next

Time to make the letter!



Edit Letter Labor Day

Design Filter Details

Download Preview Page Settings Readability Test

B I U S A Paragraph Font Family 15px

Bloom Community Center
8724 Birtz Road
Indianapolis, Indiana 46216

Name
Street
City | State/Province | ZIP Code

Hi [Formal Name],

We wanted to thank you for your [Amount] donation that you made on [Date]. Every act of your generosity helps us further our mission. In fact, your gift has helped the Jones family keep their children fed for the next 3 months.

Because we are a registered 501(c)(3) organization, your donation is completely tax deductible. Please keep this for your tax records to claim your deduction. Again, we thank you for your support in helping to make the world a better place.

Thank You

Executive Director
Bloom Community Center

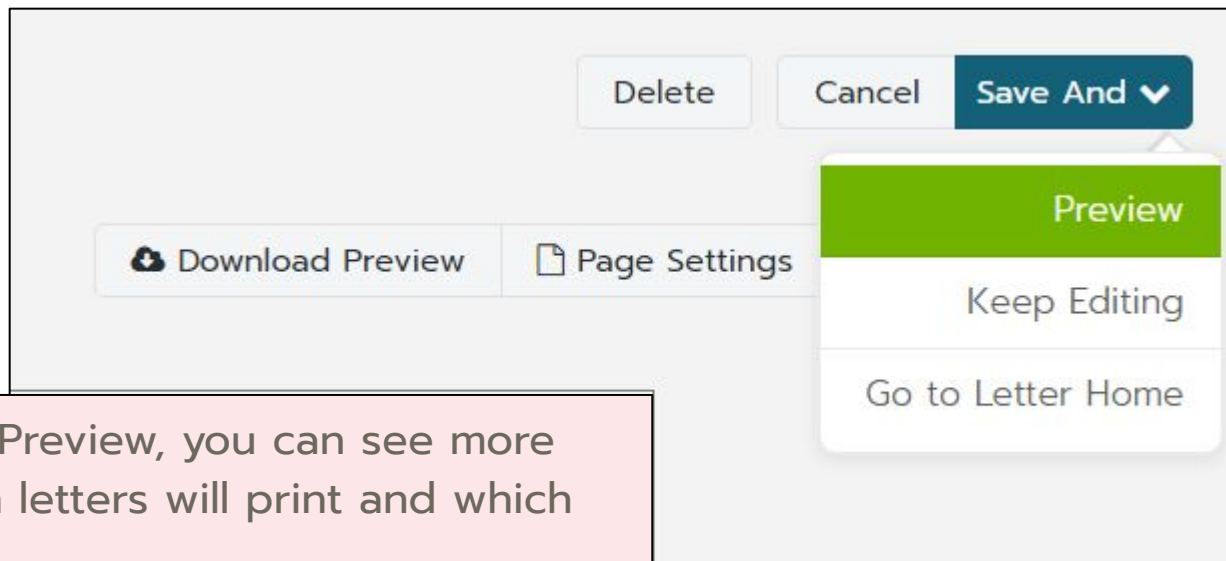
Design the letter, revise the details and create filters for the intended audience using the tabs.

Use the edit bar to edit and design the letter so it appears how you like.

You can preview the letter, conduct a readability test, create page settings and prepare to run your letters from here.

Don't forget to save!

Preview your letters



When you click on Preview, you can see more details about which letters will print and which will be skipped.

Strategies to help with skipped recipients

Preview Letter Labor Day Cancel Make Changes Run

Transactions Found	1744
Households Found	242
Households Skipped	-228
Total Letters to Generate	14

We skip creating letters when:

- the primary address is bad, incomplete, or missing
- there's a blank value or more than one value for a merge field in the letter

You can adjust these settings in the Details tab.

[View strategies](#) for handling skipped recipients.

Design Preview Recipients Skipped Recipients

Click Run to do a test or create letters

Which Would You Prefer? ✕

Do a Test

- Just the first 5 letters.
- Will not create any interactions.
- Will not add to Recent Mailings.
- Just verify that everything looks correct.

Test

Create My Letters

- All letters.
- Create interactions for each letter.
- Add to Recent Mailings.
- These are the letters you intend to mail.

Run

Download letters, labels or envelopes

Generate Letter Labor Day

We're Done!



We've created Interactions for all of the constituents that are getting a letter. You can download a PDF of these letters by clicking the large Download button below.

Download Letters

If you are printing labels or envelopes, you can download a .csv file to perform a mail merge.

Download Addresses

Download a PDF of #10 envelopes for all constituents included in this letter.

Download Envelopes

Download a PDF of Avery 5160 address labels for all constituents included in this letter.

Download Labels

Go to Letter Home

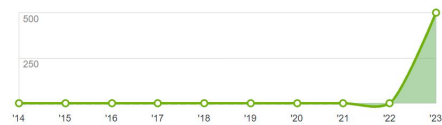
Need to edit one after printing?

1.

Richie Donor
#422 margie.worrell-richie@bloomerang.com
Address
90 Manaquayak Rd
West Tisbury, MA 02575-53...

Summary Profile Timeline Relationships

Giving Summary Revenue Raised Soft Credits



Lifetime	Average
\$500.00 \$500.00	\$500.00 \$500.00
First Transaction	Latest Transaction
\$500.00 6/1/2023	\$500.00 6/1/2023
Largest Transaction	
\$500.00 6/1/2023	

Recent Timeline Activity

9/4/2023 Mail
Other - Letter: Labor Day

2.

Richie Donor
#422 margie.worrell-richie@bloomerang.com
Address
90 Manaquayak Rd
West Tisbury, MA 02575-53...

Summary Profile **Timeline** Relationships

Edit Interaction

Date
9/4/2023

Subject
Letter: Labor Day

Note

Generated Letters

Labor Day

3.

Richie Donor
#422 margie.worrell-richie@bloomerang.com
Address
90 Manaquayak Rd
West Tisbury, MA 02575-53...
Phone
Home (246) 801-3579

Summary Profile **Timeline** Relationships

View Letter Edit Letter Back to Interaction Download Letter

Bloom Community Center
5724 Birtz Road
Indianapolis, Indiana 46216

Richie Donor
90 Manaquayak Rd
West Tisbury, MA 02575-5362

Hi Richie Donor,

We wanted to thank you for your \$500.00 donation that you made on 6/1/2023. Every act of your generosity helps us further our mission. In fact, your gift has helped the Jones family keep their children fed for the next 3 months.

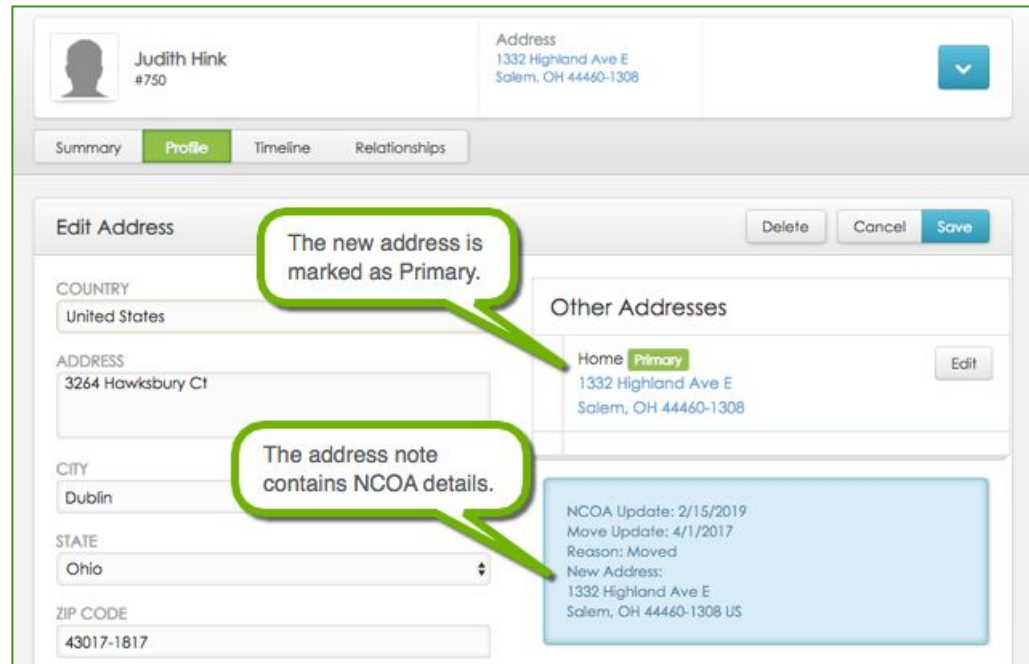
Because we are a registered 501(c)3 organization, your donation is completely tax deductible. Please keep this for your tax records to claim your deduction. Again, we thank you for your support in helping to make the world a better place.

Thank You

Executive Director
Bloom Community Center

NCOA Processing

Free with Standard Bloomerang license



Judith Hink
#750

Address
1332 Highland Ave E
Salem, OH 44460-1308

Summary **Profile** Timeline Relationships

Edit Address Delete Cancel Save

COUNTRY
United States

ADDRESS
3264 Hawksbury Ct

CITY
Dublin

STATE
Ohio

ZIP CODE
43017-1817

Other Addresses

Home **Primary** Edit

1332 Highland Ave E
Salem, OH 44460-1308

NCOA Update: 2/15/2019
Move Update: 4/1/2017
Reason: Moved
New Address:
1332 Highland Ave E
Salem, OH 44460-1308 US

The new address is marked as Primary.

The address note contains NCOA details.

Address Updates

Updated addresses contain an NCOA Note that you can report on.

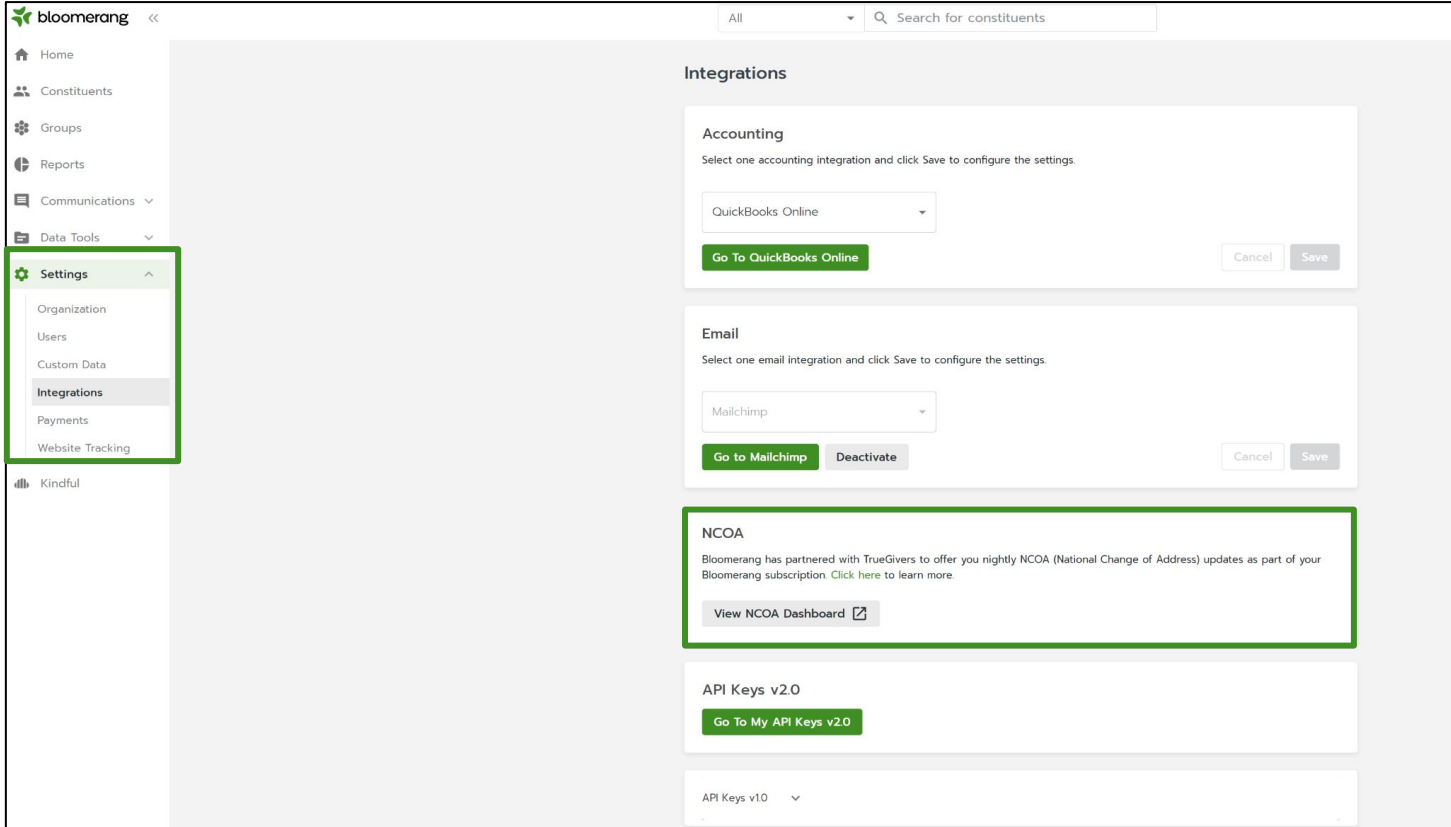
Reasons for update:

- Move (shows old and new address)
- Standardized (based on USPS standards)
- Non-Mailable (marked as "Bad Address")

Report on Has specific address > Note contains NCOA

NCOA processing does NOT delete any information!

Where do I turn it on or view it?



The screenshot displays the Bloomerang web interface. On the left, a sidebar menu is visible with the following items: Home, Constituents, Groups, Reports, Communications, Data Tools, Settings, Organization, Users, Custom Data, Integrations, Payments, and Website Tracking. The 'Settings' menu item is highlighted with a green box, and the 'Integrations' sub-item is also highlighted. The main content area is titled 'Integrations' and contains three sections:

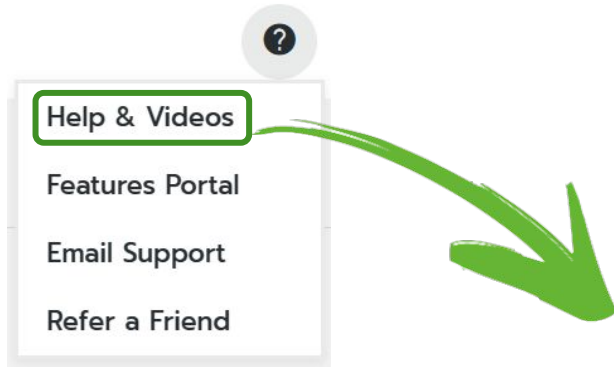
- Accounting:** Select one accounting integration and click Save to configure the settings. A dropdown menu shows 'QuickBooks Online'. Below it is a green button labeled 'Go To QuickBooks Online' and a 'Cancel' button.
- Email:** Select one email integration and click Save to configure the settings. A dropdown menu shows 'Mailchimp'. Below it are green buttons labeled 'Go To Mailchimp' and 'Deactivate', and a 'Cancel' button.
- NCOA:** Bloomerang has partnered with TrueGivers to offer you nightly NCOA (National Change of Address) updates as part of your Bloomerang subscription. Click here to learn more. Below this text is a button labeled 'View NCOA Dashboard' with an external link icon.

At the bottom of the page, there is a section for 'API Keys v2.0' with a green button labeled 'Go To My API Keys v2.0' and a dropdown menu for 'API Keys v1.0'.

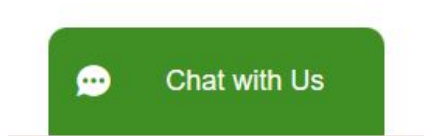
Into the database we go!

Resources

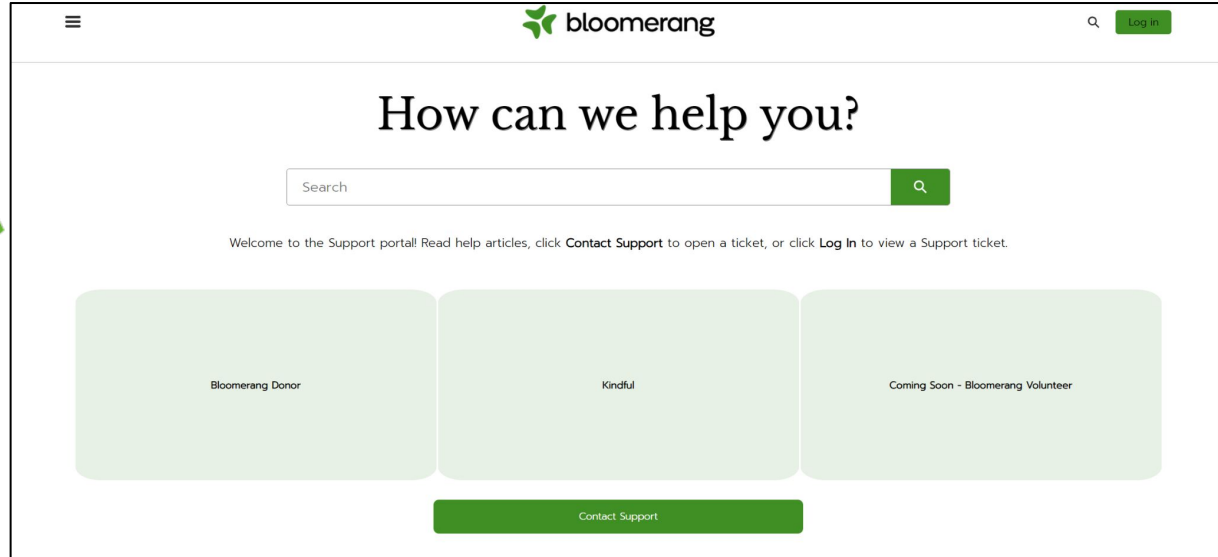
Bloomerang Knowledgebase and Support Contact



- Help & Videos
- Features Portal
- Email Support
- Refer a Friend



Chat with Us



How can we help you?

Search

Welcome to the Support portal! Read help articles, click **Contact Support** to open a ticket, or click **Log In** to view a Support ticket.

Bloomerang Donor Kindful Coming Soon - Bloomerang Volunteer

Contact Support

Resources

Knowledgebase

[Create a Letter Template](#)

[Edit a Letter Template](#)

[Run a Batch of Letters](#)

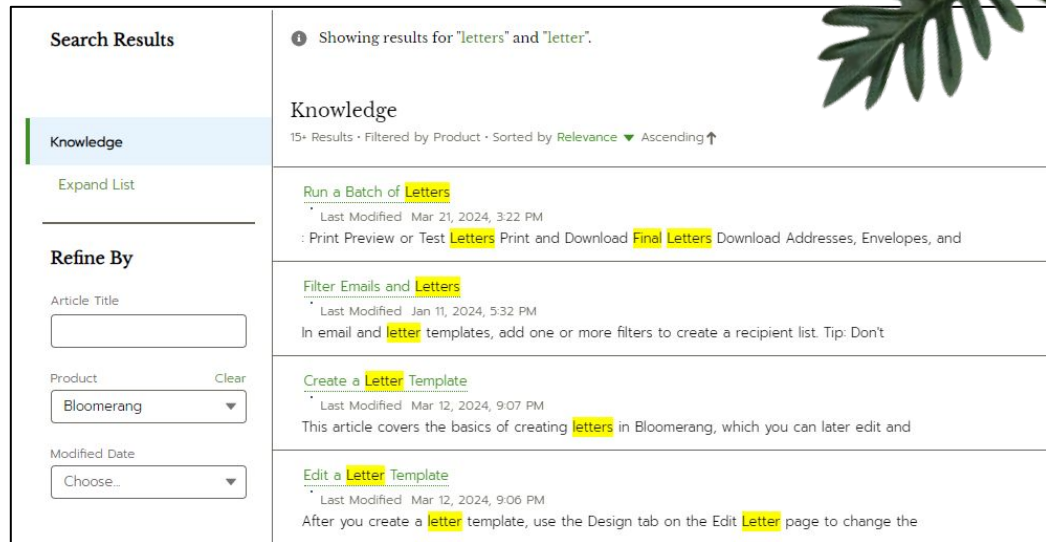
[Run an Individual Letter](#)

[Edit an Individual Letter](#)

[Filter Emails and Letters](#)

[Use the Letter Address File to Perform a Mail Merge](#)

[Handle Skipped Recipients When Generating Letters](#)



Search Results

Showing results for "letters" and "letter".

Knowledge
15+ Results · Filtered by Product · Sorted by Relevance ▼ Ascending ↑

[Run a Batch of Letters](#)
Last Modified Mar 21, 2024, 3:22 PM
: [Print Preview](#) or [Test Letters](#) [Print and Download Final Letters](#) [Download Addresses, Envelopes, and](#)

[Filter Emails and Letters](#)
Last Modified Jan 11, 2024, 5:32 PM
In email and [letter](#) templates, add one or more filters to create a recipient list. Tip: Don't

[Create a Letter Template](#)
Last Modified Mar 12, 2024, 9:07 PM
This article covers the basics of creating [letters](#) in Bloomerang, which you can later edit and

[Edit a Letter Template](#)
Last Modified Mar 12, 2024, 9:06 PM
After you create a [letter](#) template, use the Design tab on the Edit [Letter](#) page to change the





Thank you for attending!

**And thank you for all you do in
your communities!**

Visit our website to see more upcoming
Bloomerang Academy webinars!

