

Large, vibrant green Monstera leaves with characteristic holes, positioned on the left side of the slide.

# Welcome to Bloomerang Academy

Thank you for joining us!

A smaller portion of a vibrant green Monstera leaf with characteristic holes, positioned in the bottom right corner of the slide.

# Housekeeping

**Live Transcript**

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

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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](mailto:support@bloomerang.com). Our support team is amazing!

# Margie Worrell

Curriculum Manager

Margie Worrell is the Curriculum Manager at Bloomerang. She serves on the board of the Peace Learning Center in Indianapolis, and has worked extensively with nonprofits as both a staff member and a lead volunteer. Her passions include education, theatre, her two children and her two small dogs.



# Reports and Filters Basics



# What will we cover today?



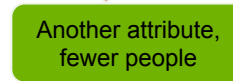
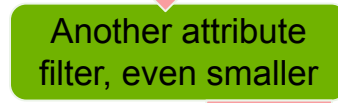
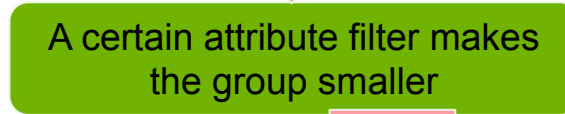
We will cover how to get this person off your back with brilliant reports!

1. **Reports List features**
2. **Creating a new report**
3. **Reports and filters processes**
4. **Filtering for groups in reports**
5. **Referencing reports in Emails/Letters/Reports**
6. **Demo reports and filters in Bloomerang**
7. **Q&A**

## Why would you run a report?

- Need to find out about financial data like projected cash flow or donors with high giving potential
- Wanting information on constituents, like lapsing donors or loyal donors
- Wanting to find constituents to volunteer
- Looking for trends over time
- **Basically, any data you want out of your database will come in the form of a REPORT**

**The most  
important part  
of your report  
is your FILTERS**



**Only the data  
you want to  
find**



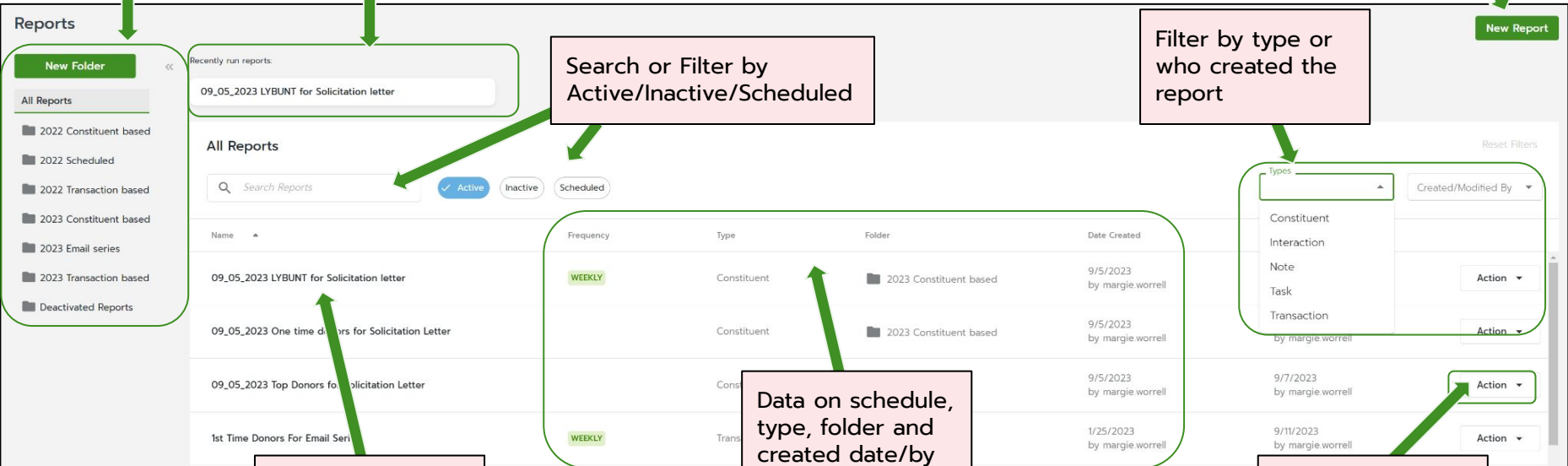
# Reports List Features

Here are some things to note:

Create and use folders to organize reports

Most recent reports

Create a new report



The screenshot shows the 'Reports' section of the Bloomerang interface. On the left is a sidebar with a 'New Folder' button and a list of folders categorized by year and type (e.g., '2022 Constituent based', '2023 Email series'). The main area is titled 'All Reports' and includes a search bar, filter buttons for 'Active', 'Inactive', and 'Scheduled', and a 'New Report' button. Below these is a table of reports with columns for Name, Frequency, Type, Folder, and Date Created. On the right, there are filter dropdowns for 'Types' and 'Created/Modified By', and a list of report types (Constituent, Interaction, Note, Task, Transaction) with associated 'Action' buttons.

Name	Frequency	Type	Folder	Date Created
09_05_2023 LYBUNT for Solicitation letter	WEEKLY	Constituent	2023 Constituent based	9/5/2023 by margie worrell
09_05_2023 One time donors for Solicitation Letter		Constituent	2023 Constituent based	9/5/2023 by margie worrell
09_05_2023 Top Donors for Solicitation Letter		Constituent		9/5/2023 by margie worrell
1st Time Donors For Email Series	WEEKLY	Transaction		1/25/2023 by margie worrell

Search or Filter by Active/Inactive/Scheduled

Filter by type or who created the report

Data on schedule, type, folder and created date/by and last modified info

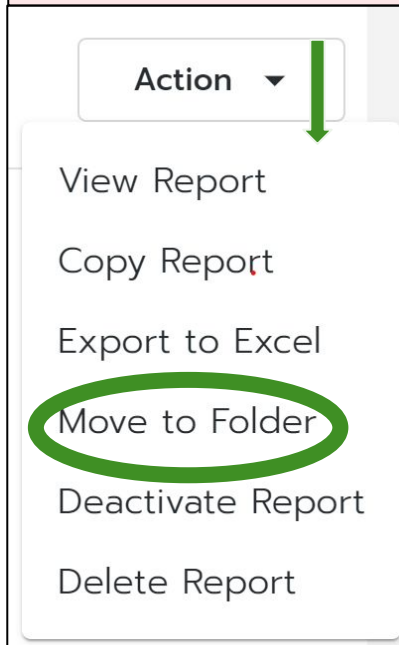
Previous Reports list

Actions you can take on reports

# Reports List Features

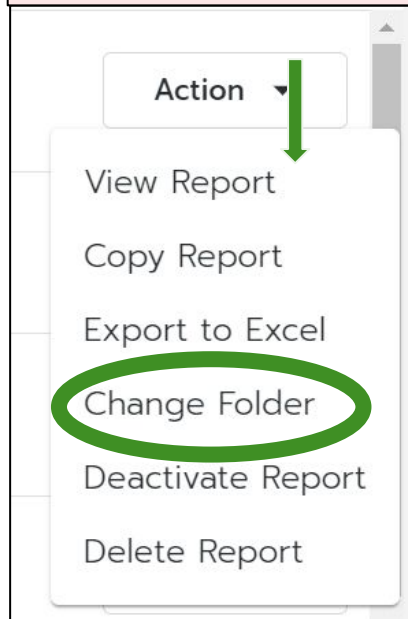
Other features:

Actions you can take on Reports **not yet** in a folder

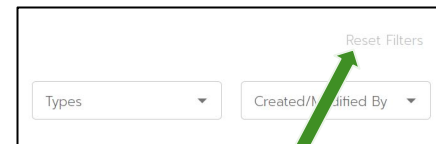


- Action ▾
- View Report
- Copy Report
- Export to Excel
- Move to Folder
- Deactivate Report
- Delete Report

Actions you can take on Reports **already** in a folder



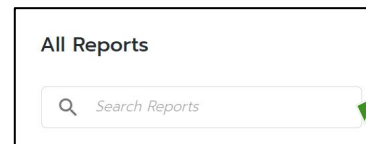
- Action ▾
- View Report
- Copy Report
- Export to Excel
- Change Folder
- Deactivate Report
- Delete Report



Reset Filters

Types ▾ Created/Modified By ▾

You can reset the filters here



All Reports

Search Reports

You can search by keywords here

Bottom of screen: You can control the number of reports you see and scroll through report pages



Rows per page: 25 ▾ 1-25 of 82 < >

# Creating a new report

New Report

Two routes to take:

## Build a report from scratch

What would you like to see in your report?

- Constituents
- Transactions
- Interactions
- Notes
- Tasks

## Start from a template

18 options!

- Check them out and see if one is close to what you are looking for.
- They are customizable, meaning you can alter the filters to meet your needs.
- They are a great place to go to learn more about filters.

**Remember:** You can access constituent filters in a transaction report and transaction filters in a constituent report.

# Templates

There's a lot going on here...don't reinvent the wheel!

Gives you a head start!

Build a report from scratch Or Start from a template

<b>Loyal Donors</b> Revenue from individual donors who have given every year from 2016-2020	<b>Top Donors</b> Donors ranked by total revenue over the last 2 years	<b>Newest Donors</b> First-time donors from the last 90 days
<b>Monthly Donors</b> Donors with an active recurring gift schedule, or 12+ gifts in the last 365 days	<b>High Potential Donors</b> Donors with both a high engagement score and a high generosity score	<b>Call List Template</b> Default columns and filters to include in any call list. Just add your own criteria for who to call!
<b>LYBUNT</b> Constituents who gave last fiscal year but not this fiscal year	<b>SYBUNT</b> Constituents who gave some fiscal year but not this fiscal year	<b>Downgrades</b> Constituents who gave less this fiscal year than last fiscal year

### Household > Filters

Include Sum of Revenue Amount of 🎁 Specific Transactions \* And..

### Constituent

The calculated > Sum > of the Revenue Amount > of 🎁 Specific Transactions >

#### Transaction Filters

Include Date is this fiscal year \* Revenue Amount is at least \$0.01 \* And..

Or..

Exclude Add filter...

is Less than > the sum of the Revenue Amount of 🎁 Specific Transactions

#### Transaction Filters

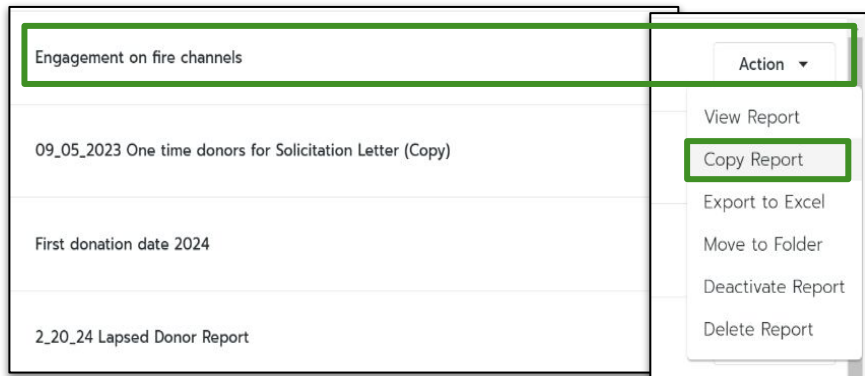
Include Date is last fiscal year \* Revenue Amount is at least \$0.01 \* And..

Or..

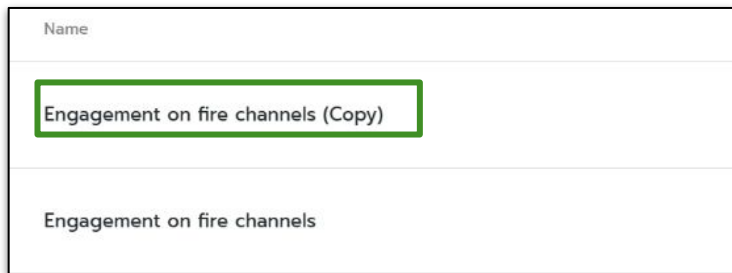
Exclude Add filter...

# DIY Templates

Copy a previously created report and use that as a template



A screenshot of a report list interface. The first report, "Engagement on fire channels", is highlighted with a green border. An "Action" dropdown menu is open for this report, with the "Copy Report" option also highlighted with a green border. Other reports in the list include "09\_05\_2023 One time donors for Solicitation Letter (Copy)", "First donation date 2024", and "2\_20\_24 Lapsed Donor Report".



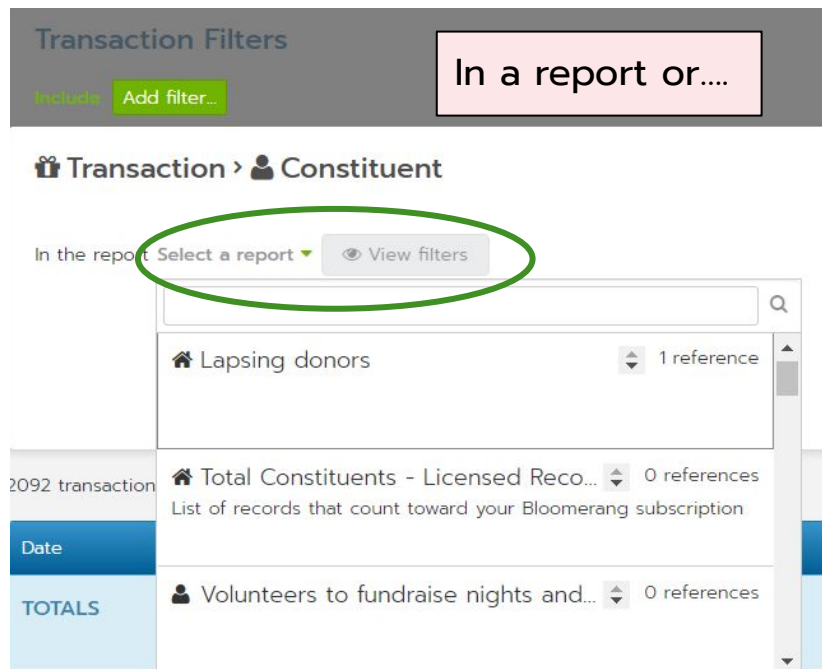
A screenshot of a report name field. The field is labeled "Name" and contains the text "Engagement on fire channels (Copy)", which is highlighted with a green border. Below the field, the original report name "Engagement on fire channels" is visible.

## Steps to use your reports as templates:

- Click on Action for the report you want to use as a template.
- Click Copy Report.
- A copy of the report is created with (Copy) at the end of the title.
- Open that copy of the report and edit away to make your new report!

# Referencing Reports in Filters

This can save you time by not re-creating filters!



**Transaction Filters**

Include [Add filter...](#)

**In a report or...**

**Transaction > Constituent**

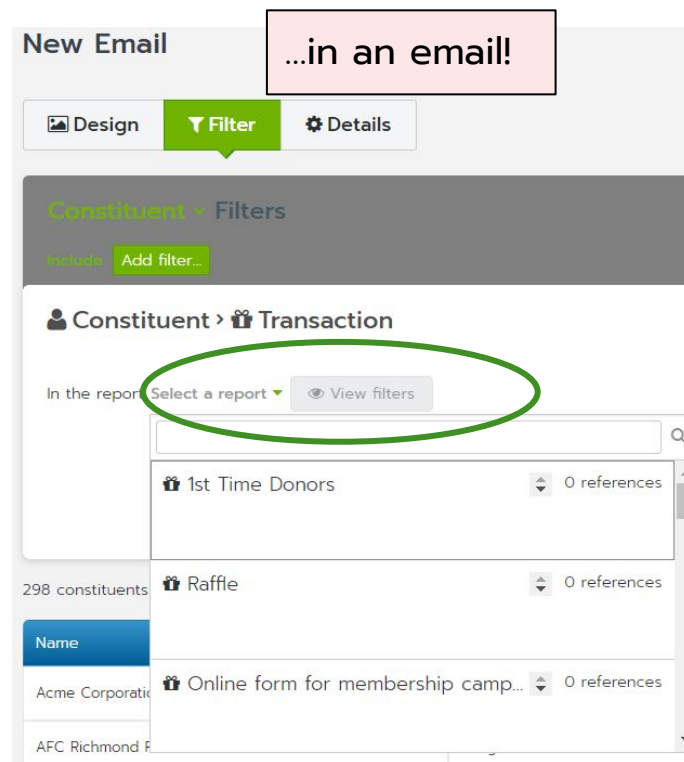
In the report **Select a report** [View filters](#)

- Lapsing donors** 1 reference
- Total Constituents - Licensed Reco...** 0 references  
List of records that count toward your Bloomerang subscription.
- Volunteers to fundraise nights and...** 0 references

2092 transaction

Date

**TOTALS**



**New Email** **...in an email!**

[Design](#) [Filter](#) [Details](#)

**Constituent > Filters**

Include [Add filter...](#)

**Constituent > Transaction**

In the report **Select a report** [View filters](#)

- 1st Time Donors** 0 references
- Raffle** 0 references
- Online form for membership camp...** 0 references

298 constituents

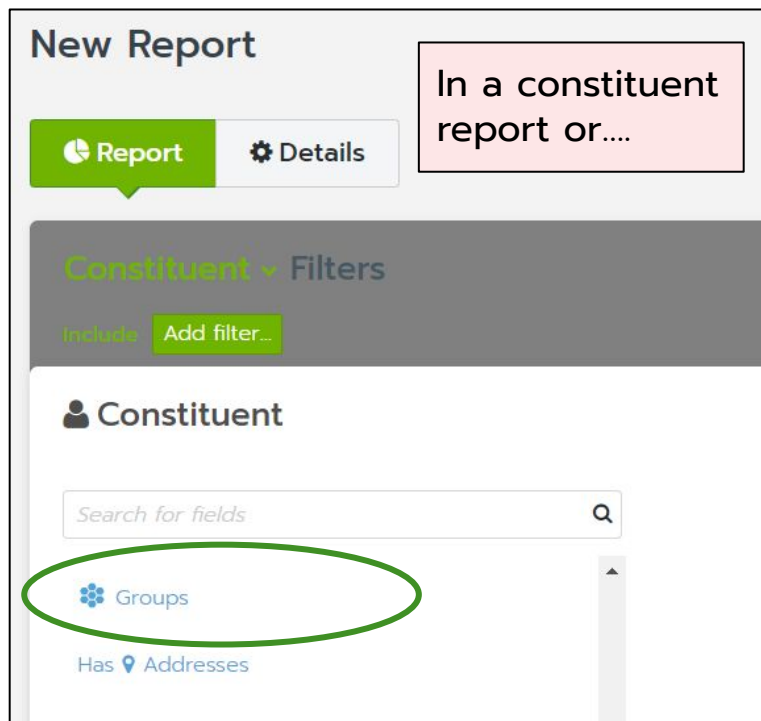
**Name**

Acme Corporati

AFC Richmond F

# Use Groups in Report Filters

This can save you time by easily segmenting for a specific group!



**New Report**

**Report** Details

In a constituent report or....

Constituent Filters

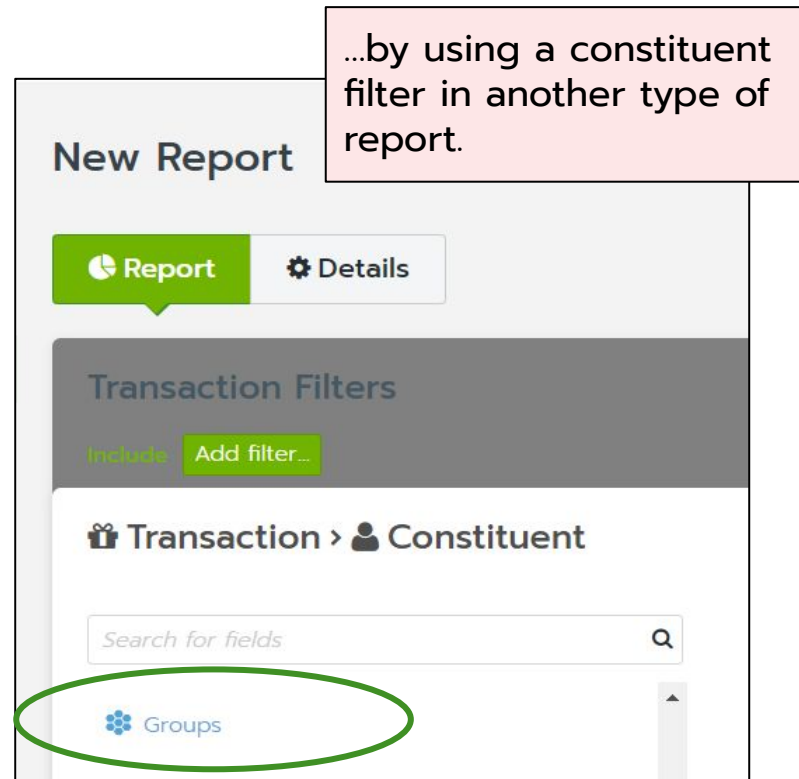
include Add filter...

Constituent

Search for fields

Groups

Has Addresses



**New Report**

**Report** Details

...by using a constituent filter in another type of report.

Transaction Filters

include Add filter...

Transaction > Constituent

Search for fields

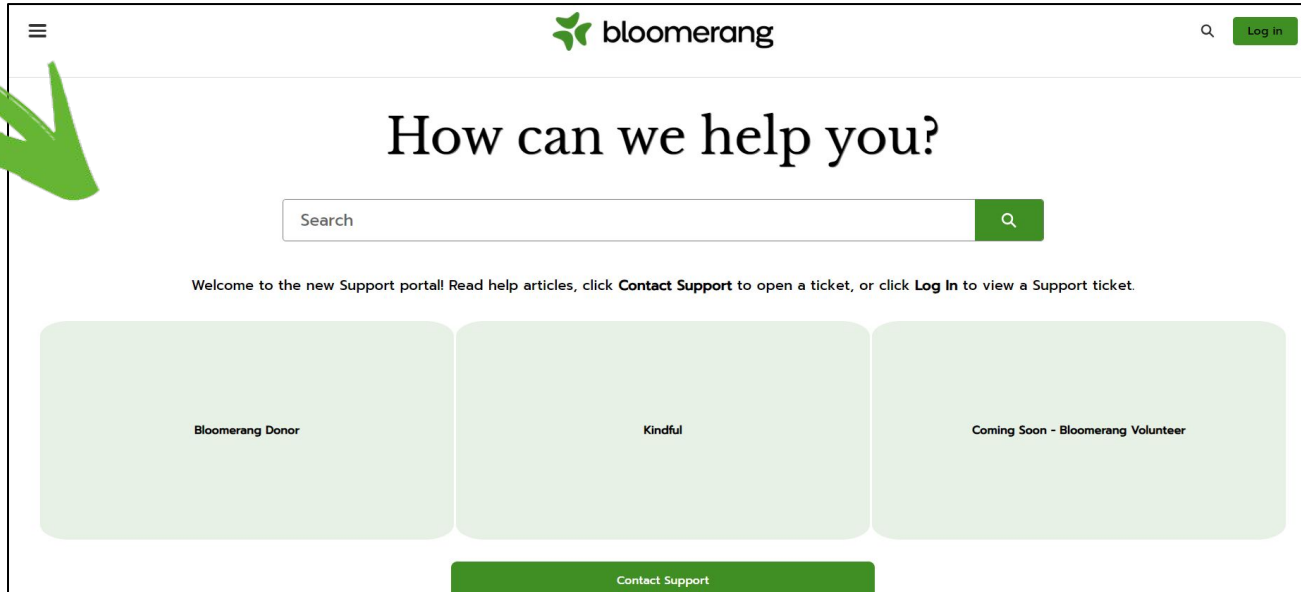
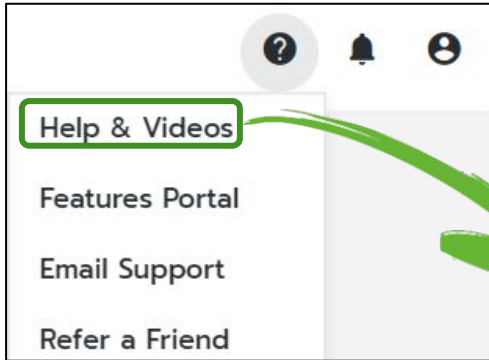
Groups









**Into the demo database we go!**

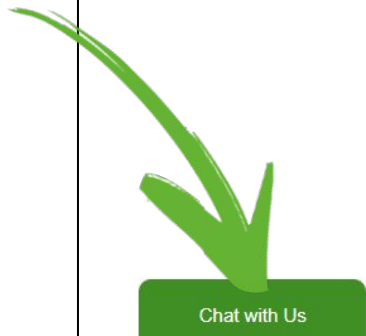


# Resources

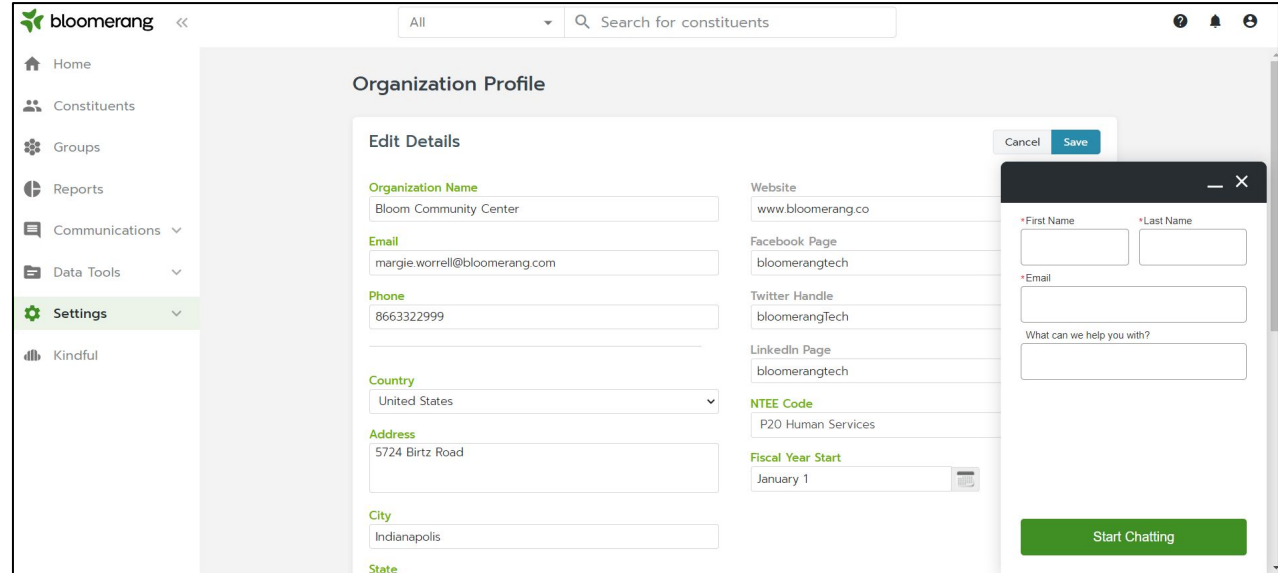
## Bloomerang Knowledgebase and Support Portal



-  Home
-  Constituents
-  Groups
-  Reports
-  Communications ▾
-  Data Tools ▾
-  **Settings** ▾
-  Kindful



# Live Chat has a new look and a new location!



The screenshot shows the Bloomerang interface with the 'Organization Profile' page open. The left sidebar has 'Settings' highlighted. The main content area shows the 'Edit Details' form for an organization named 'Bloom Community Center'. The form includes fields for Organization Name, Email (margie.worrell@bloomerang.com), Phone (8663322999), Country (United States), Address (5724 Birtz Road), City (Indianapolis), Website (www.bloomerang.co), Facebook Page (bloomerangtech), Twitter Handle (bloomerangTech), LinkedIn Page (bloomerangtech), NTEE Code (P20 Human Services), and Fiscal Year Start (January 1). A 'Start Chatting' button is located at the bottom right of the form. A small chat window is also visible on the right side of the form.



# Resources

## Knowledgebase

[Report Basics: Reporting Screen](#)

[Create Reports](#)

[Report on Households](#)

[Report Basics: Add Filters](#)

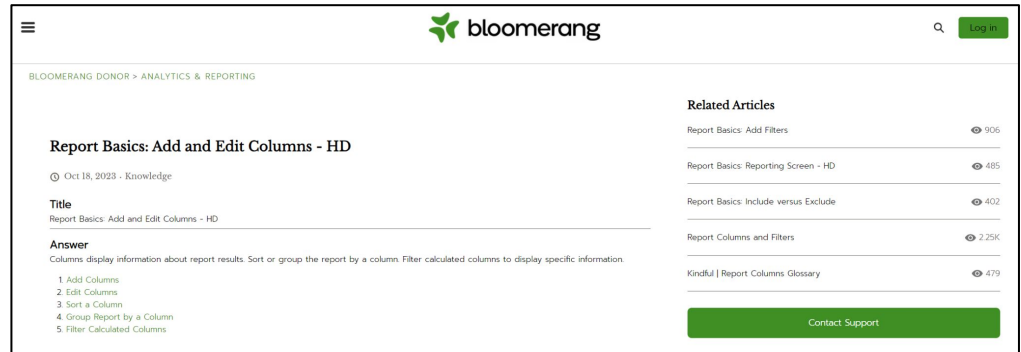
[Report Basics: And vs. Or](#)

[Report Basics: Include vs. Exclude](#)

[Run Reports for Groups](#)

[Report Columns and Filters](#)

[Report Basics: Add and Edit Columns](#)




The screenshot shows a web page from the Bloomerang Knowledgebase. At the top, there is a navigation bar with the Bloomerang logo, a search icon, and a 'Log In' button. Below the navigation bar, the breadcrumb trail reads 'BLOOMERANG DONOR > ANALYTICS & REPORTING'. The main content area features the article title 'Report Basics: Add and Edit Columns - HD' with a sub-header 'HD'. Below the title, it indicates the article was last updated on 'Oct 18, 2023' and is categorized as 'Knowledge'. The 'Title' section repeats the article title. The 'Answer' section provides a brief overview: 'Columns display information about report results. Sort or group the report by a column. Filter calculated columns to display specific information.' This is followed by a numbered list of five steps: 1. Add Columns, 2. Edit Columns, 3. Sort a Column, 4. Group Report by a Column, and 5. Filter Calculated Columns. On the right side of the page, there is a 'Related Articles' section with five entries, each with a view count: 'Report Basics: Add Filters' (906), 'Report Basics: Reporting Screen - HD' (485), 'Report Basics: Include versus Exclude' (402), 'Report Columns and Filters' (2,25K), and 'Kindful | Report Columns Glossary' (479). At the bottom right, there is a green 'Contact Support' button.

Large, vibrant green Monstera leaves with characteristic holes, positioned on the left side of the slide.

**Thank you for attending!**

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

Visit our website to see more upcoming  
Bloomerang Academy webinars!

A smaller portion of a Monstera leaf, showing its green color and hole patterns, located in the bottom right corner of the slide.