




# 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

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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.



# Managing Tasks



## What will we cover today?



1. How to view tasks
2. Create and assign tasks
3. Task notifications
4. Complete a task + convert it into an interaction
5. Reporting on tasks
6. Bulk Assign (and Re-assign)
7. Bulk Delete
8. Inactivating users with tasks



# View your tasks and others too!

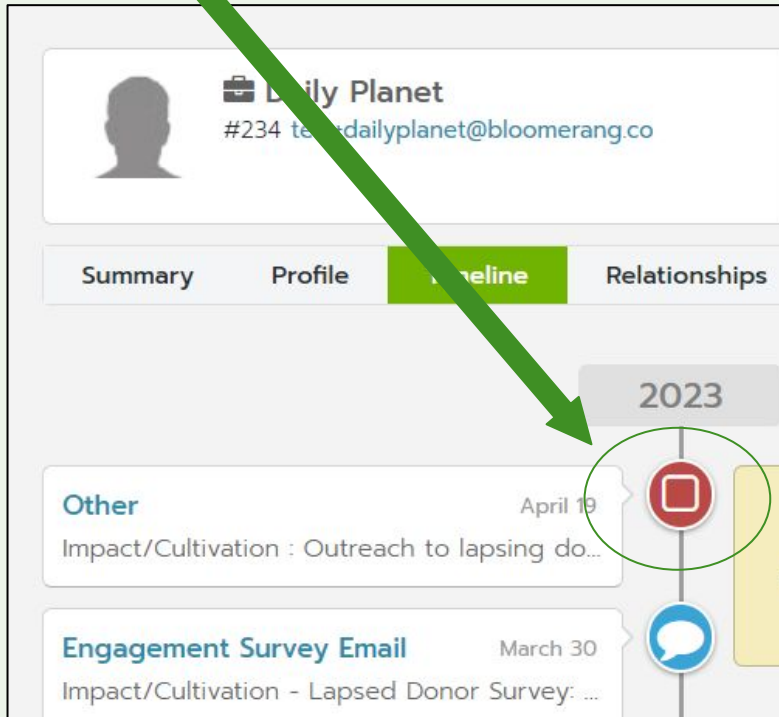


Helps with DELEGATION, DUPLICATION AND INFORMATION!





The screenshot displays the Bloomerang dashboard for user margie.worrell. The dashboard is organized into several sections:

- Home:** Greeting "Good afternoon, margie.worrell!" and "What's happening with Bloom Community Center today".
- RECENT CONSTITUENTS:** Shows "No recent constituents" with a button to "Add new Constituent".
- AMOUNT RAISED:** Displays weekly (\$6,675), monthly (\$5,000), and fiscal year (\$83,385) totals with transaction counts and averages.
- DONOR RETENTION:** A donut chart shows 71% donor retention (173 out of 241 donors retained).
- CAMPAIGNS:** Progress bars for "2024 Annual Fund (G/O Fund)" (21%) and "2024 Capital Campaign (Building Fund)" (16%).
- RECENT REPORTS:** Shows "No recent reports" with a "Go to Reports" button.
- MONTH OVER MONTH REVENUE:** A line chart comparing revenue for 2022, 2023, and 2024 across months.
- DONOR CALLS:** Lists calls for Larry Laughter, Norman Neighbor, and Louise Belcher.
- TASKS:** A sidebar on the right shows a task list with categories: ALL, MY, OVERDUE, DUE SOON, and DUE LATER. The "MY" tab is active, showing tasks like "Volunteering--call to check interest" (due APR 09), "Call to thank for extra donation" (due MAY 03), "Check on grant status" (due MAY 17), and "Rob Signorelli has a birthday next month: 05/1980" (due MAY 25).

# Tasks also show on a constituent's timeline with icons to show status

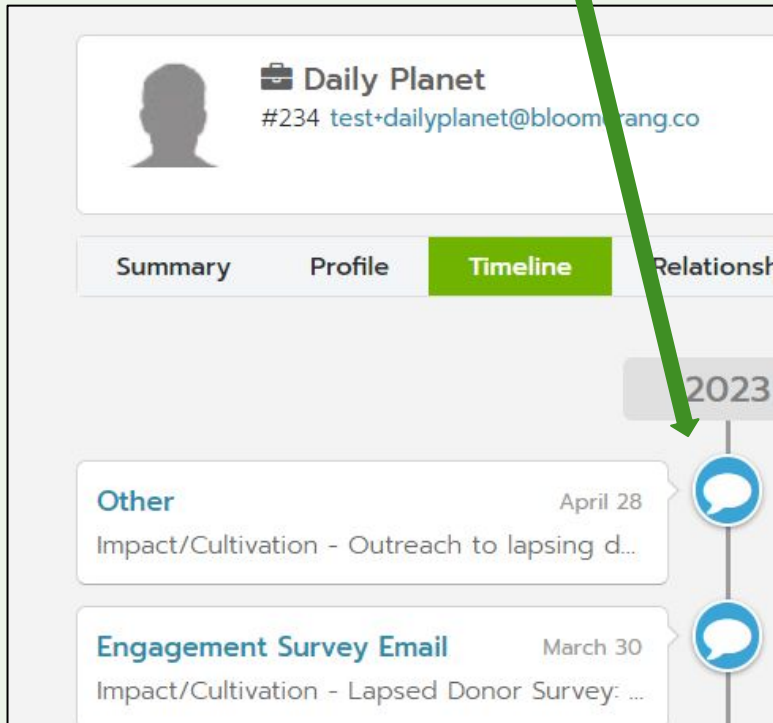


Task icons for reference





Icon	Task Status
	Active
	Overdue
	Archived
	Completed



# Unless you accomplish it and make it an interaction!



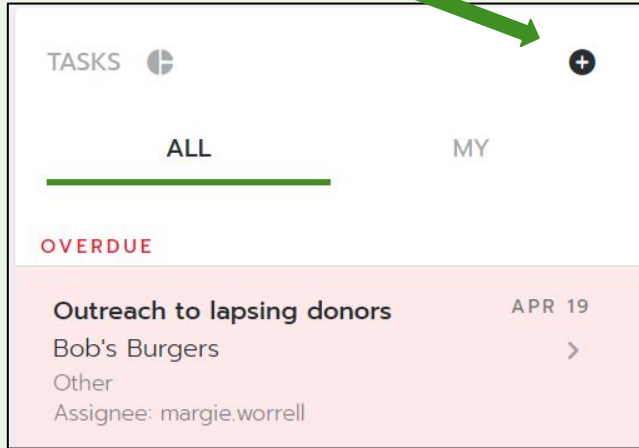
- Current and open task
- Overdue task
- Task saved for later
- Tasks without a constituent associated


Icon	Task Status
	Active
	Overdue
	Archived
	Completed

# Create and assign tasks for you and others

Do this right from your Dashboard

Create a task by clicking on the plus sign.

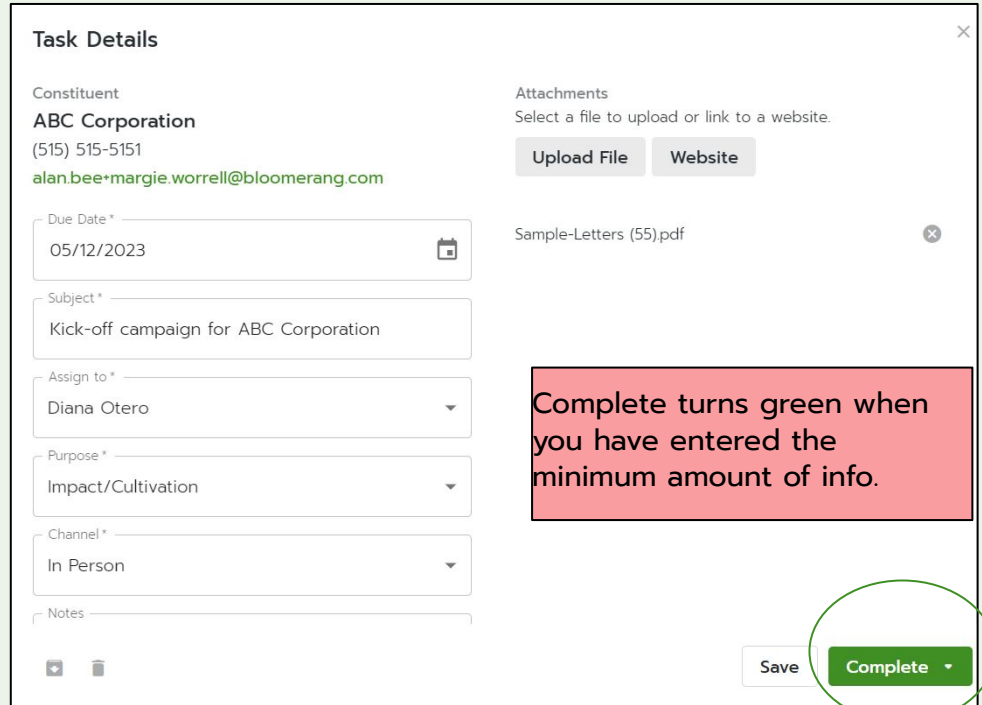


TASKS 

ALL MY

**OVERDUE**

**Outreach to lapsing donors** APR 19  
Bob's Burgers >  
Other  
Assignee: margie.worrell




Task Details ✕


Constituent  
**ABC Corporation**  
(515) 515-5151  
[alan.bee+margie.worrell@bloomerang.com](mailto:alan.bee+margie.worrell@bloomerang.com)


Attachments  
Select a file to upload or link to a website.


Sample-Letters (55).pdf ✕

Due Date \*  
05/12/2023 

Subject \*  
Kick-off campaign for ABC Corporation

Assign to \*  
Diana Otero 

Purpose \*  
Impact/Cultivation 

Channel \*  
In Person 

Notes

Complete turns green when you have entered the minimum amount of info.

# Notification emails for you or your colleagues

Reminders make it easier to stay on track!



erang

The diagram shows a task notification email from Bloomerang with several callout boxes pointing to specific parts of the email content:

- Task details, including notes** points to the task details section.
- Constituent contact info** points to the constituent information section.
- Attachments if applicable** points to the attachments section.
- Reply to complete task** points to the instruction to reply to complete the task.
- Open in Bloomerang** points to the link to open the task in Bloomerang.
- Manage task notifications** points to the link to manage task notification emails.

Hi, margie.worrell,

You assigned yourself the following task in Bloomerang:

- Subject: Kick-off campaign for ABC Corporation
- Due Date: 5/19/2023
- Purpose: Impact/Cultivation
- Channel: In Person
- Note:  
Details will be sent from ABC Corporation a week prior to the event. Will be delivering a 30-minute informational talk. See attached outline. Thanks!
- Constituent:
  - ABC Corporation
  - [\(515\) 515-5151](tel:5155155151)
  - [alan.bee+margie.worrell@bloomerang.com](mailto:alan.bee+margie.worrell@bloomerang.com)
- Attachments:
  - [Sample-Letters \(55\).pdf](#)

Reply to this email to mark this task as Completed in Bloomerang. Any text you add in the reply will be captured on the completed task.

If you need more information, [click here](#) to open this task in Bloomerang.

You may also [click here](#) to manage your task notification emails going forward.

Keep up the good work!

— Team Bloomerang

# Update notifications help you know when things change...



---

Hi, margie.worrell,

You updated one of your tasks in Bloomerang. Here is the new information:

- Subject: Call the venue for the gala
- **Due Date: 4/20/2023**
- Purpose: Special Event
- Channel: Phone

Reply to this email to mark this task as Completed in Bloomerang. Any text you add in the reply will be captured on the completed task.

If you need more information, [click here](#) to open this task in Bloomerang.

You may also [click here](#) to manage your task notification emails going forward.

Keep up the good work!

— Team Bloomerang

---

# Complete a task and make it an interaction on the constituent's timeline or just complete

### Task Details DUE SOON

Constituent  
**John Francis Donaghy**  
(601) 867-8137  
test-john.donaghy@bloomerang.co

Attachments  
Select a file to upload or link to a website.  
Upload File Website

Due Date \*  
05/01/2023

Subject \*  
Call John to ask about volunteering for gala

Assign to \*  
margie.worrell

Purpose \*  
Special Event

Channel \*  
Phone

Notes

Save **Complete**

- Complete
- Save as Interaction

**John Francis Donaghy**  
#92 test-john.donaghy@bloomerang.co

Address  
Bad address

**Summary** Profile Timeline Relationships

### Giving Summary

Revenue Raised Soft Credits

Lifetime	Average
\$1,550.00 \$1,550.00	\$193.75 \$193.75
First Transaction \$250.00 10/15/2014	Latest Transaction \$150.00 1/18/2023
Largest Transaction \$500.00 2/12/2022	

### Recent Timeline Activity

5/1/2023 Phone  
Special Event - Call John to ask about volunteering for gala

# Reporting on tasks

A great way to visualize workload for staff

## New Report

Cancel Save And ▾

Report Details

### Task Filters

**Include** Status is 'Active' ✕ And...

---

Or...

---

**Exclude** Add filter...

3 tasks found (last run a few seconds ago) Refresh Add Column

Due Date	Status	User	Name	Subject	Purpose	Channel
6/1/2022	Active	Bloomerang User	Andy Dwyer	Send Thank You Note	Acknowledgement	Mail
6/17/2022	Active	jon.coleman+massupdates@bloomerang.com		Send Update Email	Impact/Cultivation	Mass Email
7/1/2022	Active	Bloomerang User		Write Newsletter	Newsletter	Email



# Create bulk tasks

Start with a constituent-based report

**New Report** Cancel Save And

Report Details

**Constituent** Filters

Include Availability is 'Day' Skills and Talents contains any value And

Or

Exclude Add filter...

5 constituents found (last run a few seconds ago) Refresh Add Column

Action

- Add New Group
- Add to Group
- Remove from Group
- Create Bulk Task


Name	Primary Street	Primary City	Primary State	Primary ZIP Code	Primary Email Address
Adam Ant					margie.worrell-adam@bloomerang.com
Annabelle Bananabelle	3000 N Meridian St	Indianapolis	IN	46208-4716	margie.worrell-annabelle.bananabelle@bloomerang.com
Joy Peaceful	6101 N Keystone Ave	Indianapolis	IN	46220-2488	joy.peaceful-margie.worrell@bloomerang.com
Hannah Phelps					hannah.phelps+margie.worrell@bloomerang.co
Edward Scissorhands	7701 E 42nd St	Indianapolis	IN	46226-5202	margie.worrell-edward@bloomerang.com

# Create bulk tasks

Once you assign it, the owner can then re-assign if needed.

### Tasks

×

Due Date \*  
11/09/2023 

Subject \*

Assign to \*  
margie.worrell ▼

Purpose \* ▼

Channel \* ▼

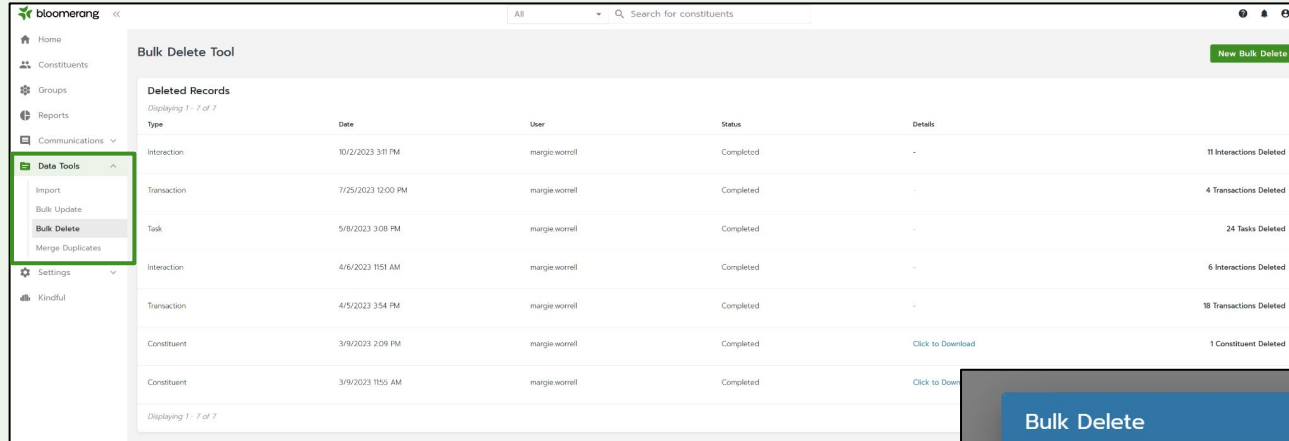
Notes

Attachments  
Select a file to upload or link to a website.  
[Upload File](#) [Website](#)

Tasks to be created:  
5

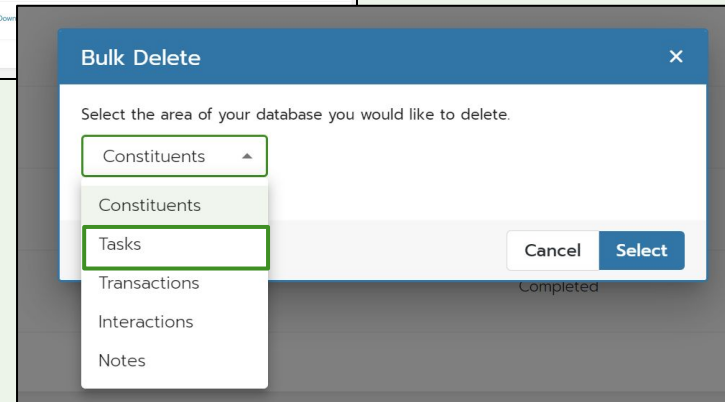
[Cancel](#) [Save](#)

# Bulk Deleting Tasks



The screenshot shows the 'Bulk Delete Tool' interface in Bloomerang. The left sidebar has 'Data Tools' expanded, with 'Bulk Delete' highlighted. The main area displays a table of deleted records with columns for Type, Date, User, Status, and Details. A 'New Bulk Delete' button is in the top right.

Type	Date	User	Status	Details
Interaction	10/2/2023 3:31 PM	margie worrell	Completed	-
Transaction	7/25/2023 12:00 PM	margie worrell	Completed	-
Task	5/8/2023 3:08 PM	margie worrell	Completed	-
Interaction	4/6/2023 11:51 AM	margie worrell	Completed	-
Transaction	4/5/2023 3:54 PM	margie worrell	Completed	-
Constituent	3/9/2023 2:09 PM	margie worrell	Completed	Click to Download
Constituent	3/9/2023 1:55 AM	margie worrell	Completed	Click to Download



The 'Bulk Delete' dialog box is shown, prompting the user to 'Select the area of your database you would like to delete.' The dropdown menu is open, showing options: Constituents, Constituents, Tasks, Transactions, Interactions, and Notes. The 'Tasks' option is selected. There are 'Cancel' and 'Select' buttons at the bottom right.

**Bulk Delete** [X]

Select the area of your database you would like to delete.

- Constituents
- Constituents
- Tasks**
- Transactions
- Interactions
- Notes

Cancel Select

Completed

# Bulk Deleting Tasks

Filter for the tasks you want to delete

### Bulk Delete Tasks

**Delete** **Delete**

**Task Filters**

Include Created Date is in November the 16 day of the month **And**

**Or**

Exclude **Add filter**

**Cancel**

### Bulk Delete Tool

**New Bulk Delete**

**Deleted Records**

Displaying 1 - 8 of 8

Type	Date	User	Status	Details
Task	11/8/2023 12:05 PM	margie worrell	Completed	--

**49 Tasks Deleted**

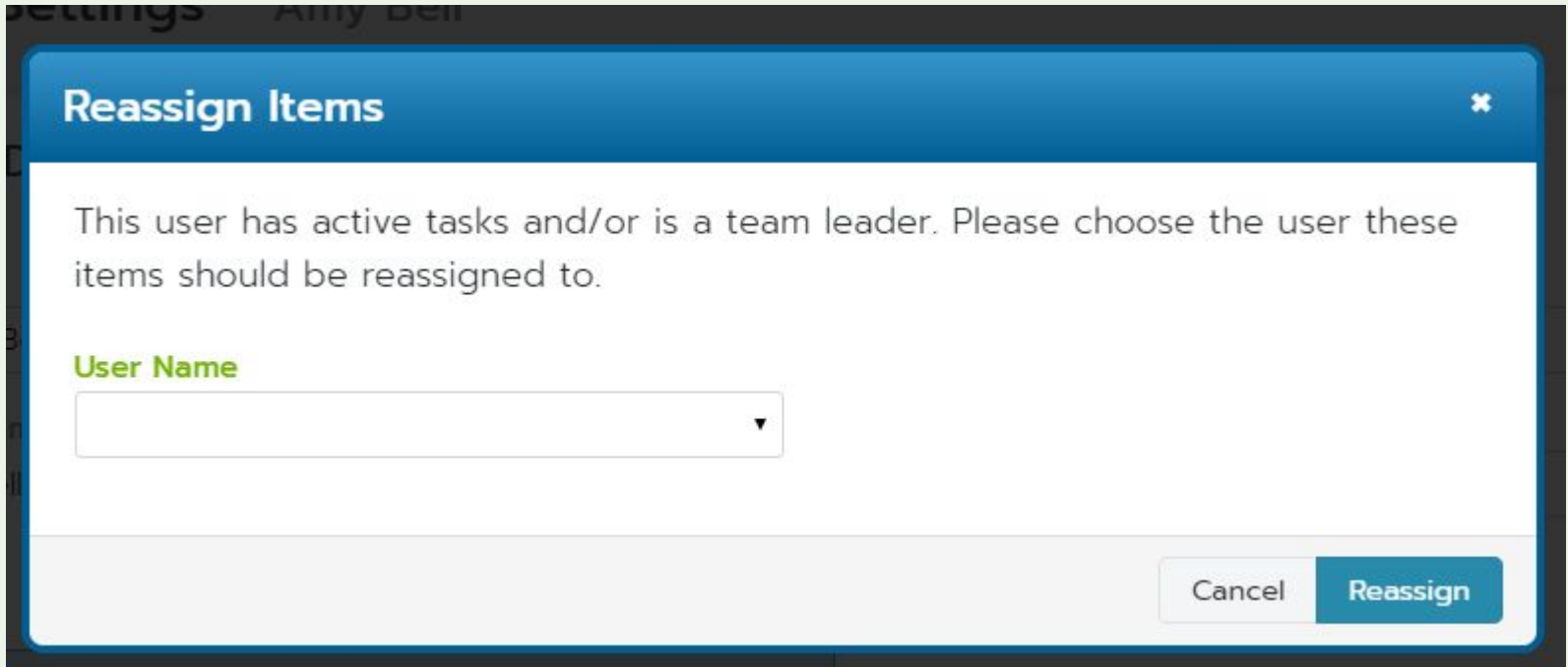
11/16/2022	Complete	margie worrell	Sirius Black	Volunteer opportunity	Volunteer Activity	Email
11/16/2022	Complete	margie worrell	Michael Bluth	Volunteer opportunity	Volunteer Activity	Email
11/16/2022	Complete	margie worrell	Greg Brady	Volunteer opportunity	Volunteer Activity	Email
11/16/2022	Complete	margie worrell	Mike and Carol Paul/Ann Brady	Volunteer opportunity	Volunteer Activity	Email
11/16/2022	Complete	margie worrell	Geoffrey Butler	Volunteer opportunity	Volunteer Activity	Email
11/16/2022	Complete	margie worrell	Blanche Devereaux	Volunteer opportunity	Volunteer Activity	Email
11/16/2022	Complete	margie worrell	John Francis Donaghy	Volunteer opportunity	Volunteer Activity	Email
11/16/2022	Complete	margie worrell	Wilson Fisk	Volunteer opportunity	Volunteer Activity	Email

**Add Column**

**+**

# Deactivating Users with Tasks

Keeps tasks from getting lost if someone takes leave...



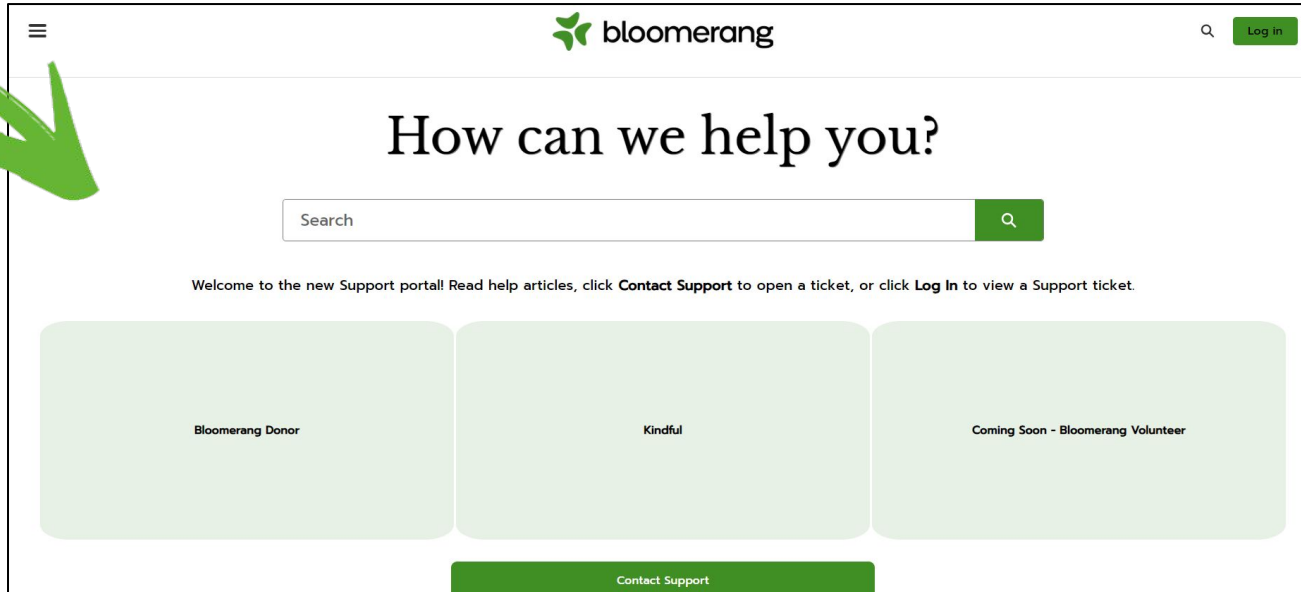
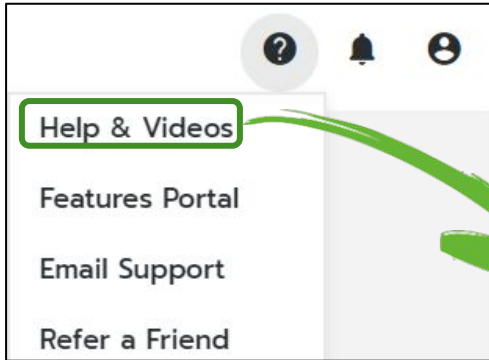
The image shows a screenshot of a software interface with a modal dialog box titled "Reassign Items". The dialog has a blue header bar with the title and a close button (an 'x' icon). The main content area is white and contains the following text: "This user has active tasks and/or is a team leader. Please choose the user these items should be reassigned to." Below this text is a dropdown menu with the label "User Name" in green text. The dropdown menu is currently empty, showing only a small downward-pointing triangle icon on the right side. At the bottom right of the dialog, there are two buttons: a light gray "Cancel" button and a blue "Reassign" button.









**Into the database we go!**

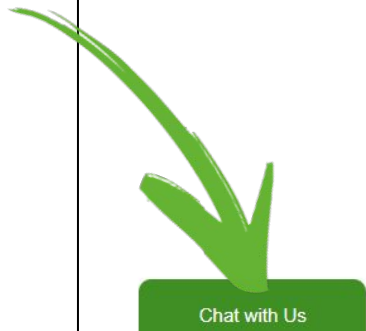


# Resources

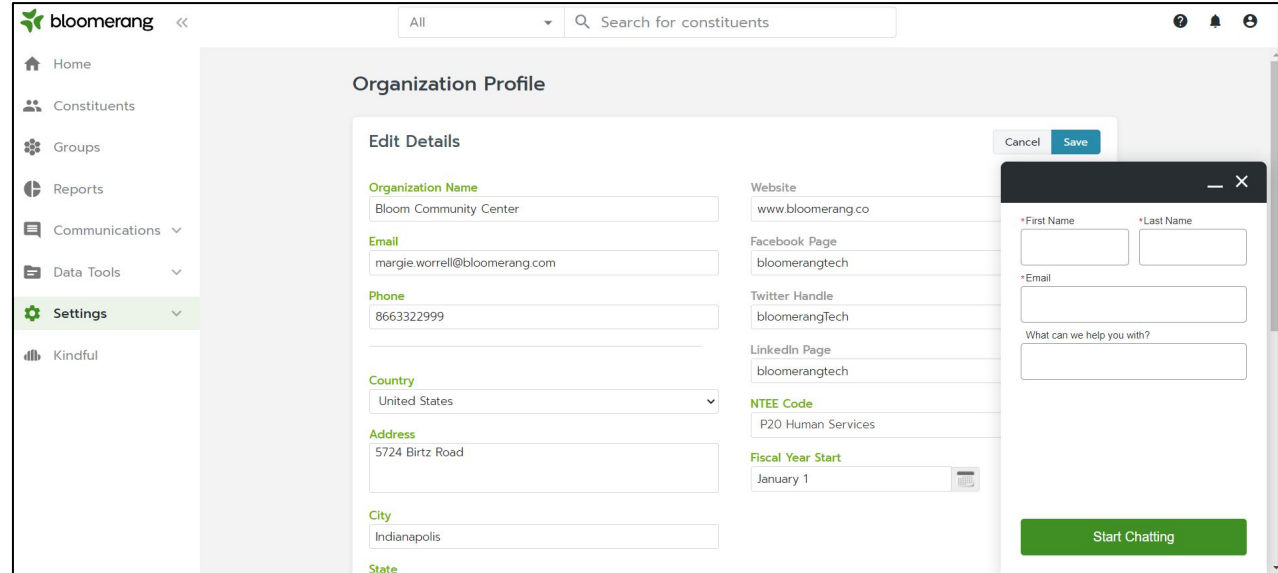
## Bloomerang Knowledgebase and Support Portal



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



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



**Organization Profile**

**Edit Details**

<b>Organization Name</b> Bloom Community Center	<b>Website</b> www.bloomerang.co
<b>Email</b> margie.worrell@bloomerang.com	<b>Facebook Page</b> bloomerangtech
<b>Phone</b> 8663322999	<b>Twitter Handle</b> bloomerangTech
<b>Country</b> United States	<b>LinkedIn Page</b> bloomerangtech
<b>Address</b> 5724 Birtz Road	<b>NTEE Code</b> P20 Human Services
<b>City</b> Indianapolis	<b>Fiscal Year Start</b> January 1
<b>State</b>	

**Start Chatting**

# Resources

## Knowledgebase

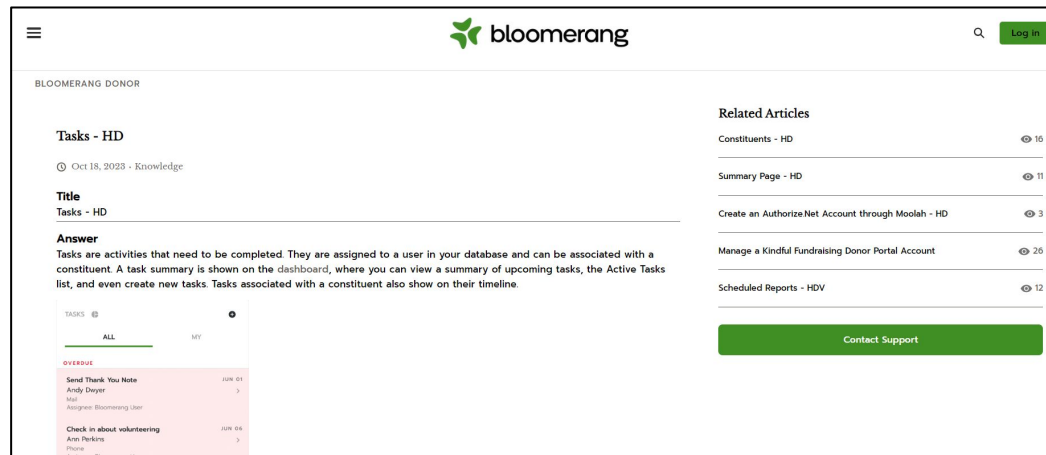
### Tasks

### View Tasks

### Create, Edit and Complete Tasks

### Channel and Purpose

### Bulk Delete Tasks



The screenshot shows a web interface for a knowledgebase article titled "Tasks - HD". The page header includes the Bloomerang logo and a "Log in" button. The article content includes a date "Oct 18, 2023" and a "Knowledge" category. The "Title" is "Tasks - HD" and the "Answer" section explains that tasks are activities assigned to users, with a link to a dashboard for task management. Below the text is a "TASKS" table with filters for "ALL" and "MY". Two tasks are listed: "Send Thank You Note" (due JUN 01) and "Check in about volunteering" (due JUN 04). A "Related Articles" sidebar on the right lists other articles with view counts, and a "Contact Support" button is at the bottom.


TASKS	
ALL	MY
<b>OVERDUE</b>	
Send Thank You Note Andy Dwyer Assign: Bloomerang User	JUN 01
Check in about volunteering Ann Perkins	JUN 04

Related Articles	
Constituents - HD	16
Summary Page - HD	11
Create an AuthorizeNet Account through Moolah - HD	3
Manage a Kindful Fundraising Donor Portal Account	26
Scheduled Reports - HDV	12

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

**Thank you for attending!**

Visit our website to see more upcoming  
Bloomerang Academy webinars!

A smaller portion of a Monstera leaf, located in the bottom right corner of the slide.