


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!

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

A smaller cluster of vibrant green Monstera leaves with characteristic holes, positioned in the bottom right corner of the slide.

Dashboard Discovery



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!

Housekeeping

Live Transcript

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

Hide Subtitle

View Full Transcript

Subtitle Settings...



Chat



Raise Hand



Q&A



Live Transcript

Share ideas

Ask questions

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.



What will we cover today?

Take a tour around your dashboard to see what Bloomerang has to offer!

Tiles

1. Search bar
2. Recent Constituents, Recent Reports
3. Amount Raised, Donor Retention Wheel, Campaigns, Month-over-Month Revenue
4. Donor Calls and Tasks
5. Upper Right–Notifications, Knowledgebase, Log out, Update info

Left-side Navigation Bar

1. Constituents
2. Groups
3. Reports
4. Communications
5. Data Tools
6. Settings
7. Kindful (if you have this add-on)

Your Bloomerang Dashboard



bloomerang All Search for constituents

Home
Constituents
Groups
Reports
Communications
Data Tools
Settings
Kindful

Good afternoon, margie.worrell!

What's happening with Bloom Community Center today Last updated 05/08/24 6:10am Update

RECENT CONSTITUENTS

- The Loves
- Christie Love
- Jay Barclay Love
- Carlton Banks
- Megan Ellis

Add new Constituent

AMOUNT RAISED

This week	2 transactions
\$130	\$65.00 avg
This month	5 transactions
\$7,130	\$1,426.00 avg
This fiscal year	328 transactions
\$85,515	\$260.72 avg

DONOR RETENTION

71%
DEFAULT

174 out of 244 donors retained

CAMPAIGNS

2024 Annual Fund (G/O Fund) Calendar Year
21% GOAL: \$260,000
View transactions

2024 Capital Campaign (Building Fund) Calendar Year
16% GOAL: \$50,000
View transactions

RECENT REPORTS

09_05_2023 LYBUNT for Solicitation letter

Go to Reports

MONTH OVER MONTH REVENUE

Month	2022	2023	2024
JAN	\$35k	\$45k	\$10k
FEB	\$10k	\$35k	\$10k
MAR	\$10k	\$25k	\$50k
APR	\$10k	\$20k	\$25k
MAY	\$20k	\$110k	\$15k
JUN	\$10k	\$90k	\$10k
JUL	\$10k	\$55k	\$10k
AUG	\$10k	\$35k	\$10k
SEP	\$40k	\$115k	\$40k
OCT	\$10k	\$10k	\$10k
NOV	\$10k	\$85k	\$10k
DEC	\$10k	\$10k	\$10k

DONOR CALLS

Mary Poppins
\$1,000.00 Donation
5/8/2024 SET TIME

Megan Ellis
\$500.00 Donation
4/6/2024 SET TIME

TASKS

ALL MY

DUE SOON

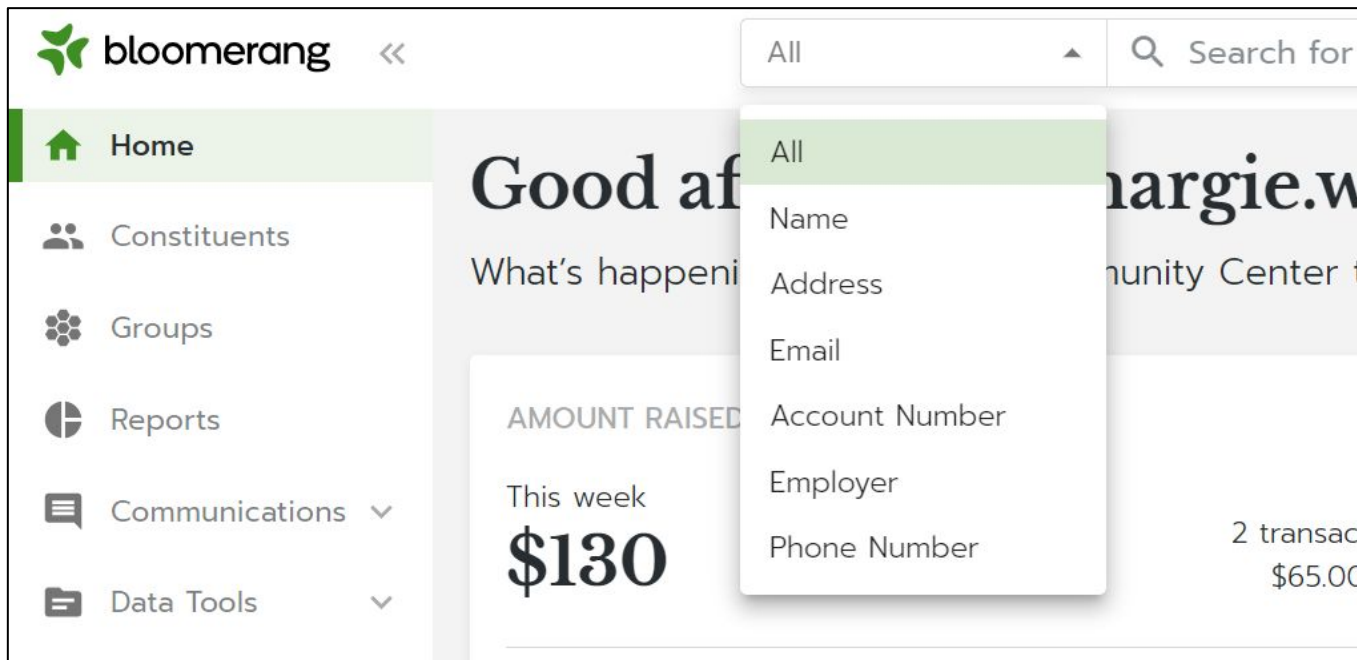
- Email about DM Campaign starting soon MAY 08
Kevin Malone >
Email
- Email about DM Campaign starting soon MAY 08
Oscar Martinez >
Email
- Email about DM Campaign starting soon MAY 08
Michael Scott >
Email

SUSTAINABILITY SCORECARD

View Now

Chat with Us

Search bar




The screenshot shows the Bloomerang web interface. On the left is a navigation sidebar with options: Home, Constituents, Groups, Reports, Communications, and Data Tools. At the top right, there is a search bar with a dropdown menu currently open, displaying the following options: All, Name, Address, Email, Account Number, Employer, and Phone Number. The background of the interface shows a dashboard with a large heading 'Good af' and 'margie.w', a sub-heading 'What's happeni', and a prominent display of '\$130' under the heading 'AMOUNT RAISED This week'. To the right of the \$130, it says '2 transact' and '\$65.00'.

- Can search by areas using drop down.
- Search term–2 words–will search for both separately.
- Use “quotes” to create a search phrase.
- Use an * to create a wild card search–don’t know end of name.

Recent Constituents/Recent Reports

Save time if you need to hop back to what you were just working on

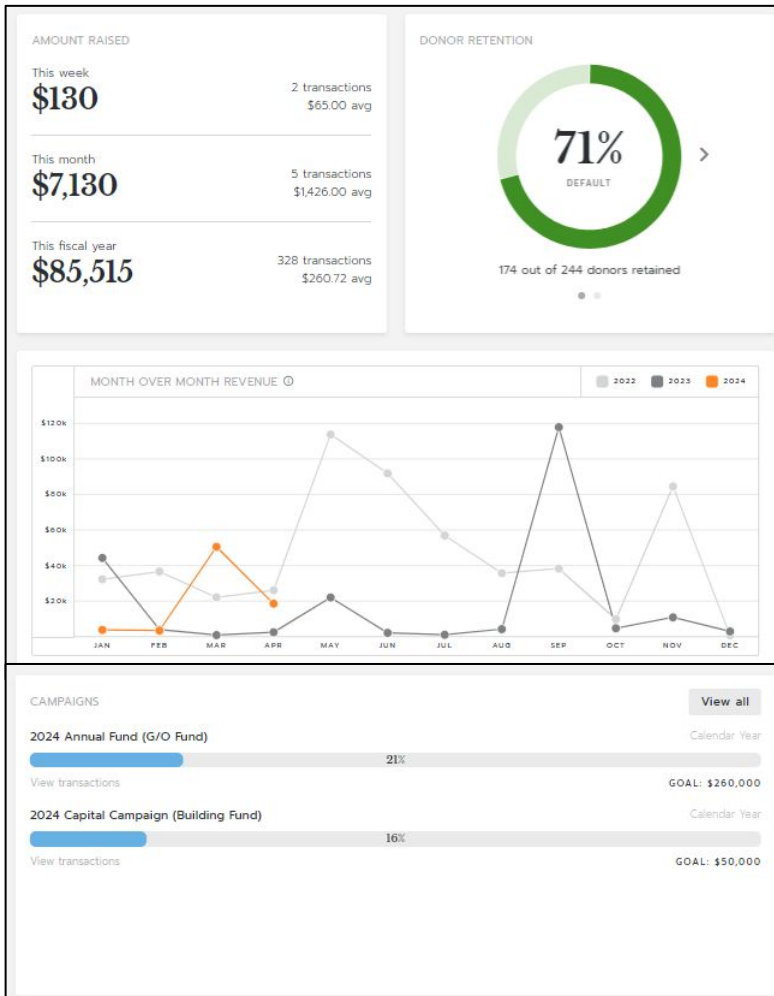


The screenshot displays two side-by-side panels within a light gray border. The left panel is titled 'RECENT CONSTITUENTS' and lists five entries: 'Kermit The Frog', 'Adrian Hollingsworth', 'The Loves', 'Christie Love', and 'Jay Barclay Love'. Each entry is followed by a horizontal line. At the bottom of this panel is a gray button labeled 'Add new Constituent'. The right panel is titled 'RECENT REPORTS' and lists two entries: '09_05_2023 One time donors for Solicitation...' and '09_05_2023 LYBUNT for Solicitation letter'. Each entry is followed by a horizontal line. At the bottom of this panel is a gray button labeled 'Go to Reports'.

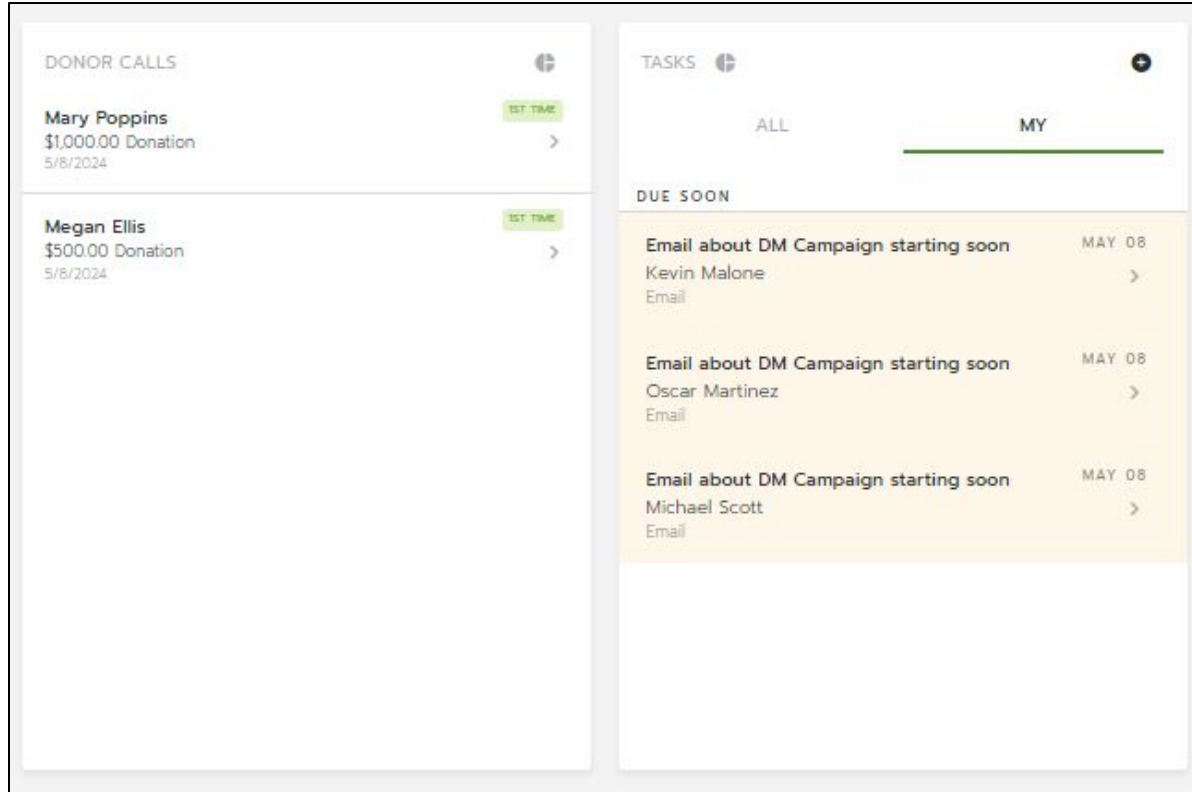
RECENT CONSTITUENTS	RECENT REPORTS
Kermit The Frog	09_05_2023 One time donors for Solicitation...
Adrian Hollingsworth	09_05_2023 LYBUNT for Solicitation letter
The Loves	
Christie Love	
Jay Barclay Love	
Add new Constituent	Go to Reports

- Amount Raised
- Donor Retention
- Campaigns
- Month-over-Month Revenue

Track your fundraising right from your dashboard



Donor Calls and Tasks



The screenshot displays two main sections: 'DONOR CALLS' and 'TASKS'.

DONOR CALLS

- Mary Poppins**: \$1,000.00 Donation, 5/8/2024. Includes a '1ST TIME' badge and a right-pointing arrow.
- Megan Ellis**: \$500.00 Donation, 5/8/2024. Includes a '1ST TIME' badge and a right-pointing arrow.

TASKS

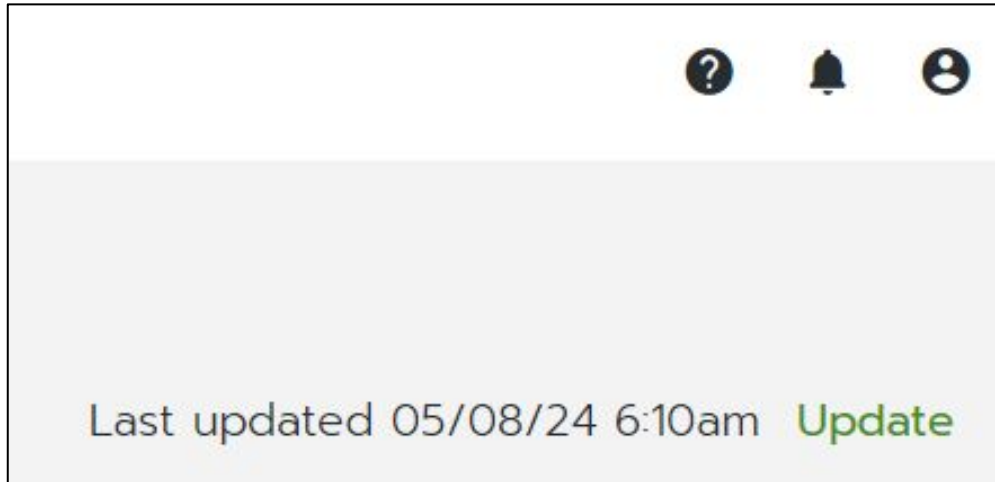
Filter tabs: ALL, MY (selected)




DUE SOON

- Email about DM Campaign starting soon** (MAY 08): Kevin Malone, Email. Includes a right-pointing arrow.
- Email about DM Campaign starting soon** (MAY 08): Oscar Martinez, Email. Includes a right-pointing arrow.
- Email about DM Campaign starting soon** (MAY 08): Michael Scott, Email. Includes a right-pointing arrow.

Use these features to help you steward your donors and track your important work.

Upper Right–Notifications, Knowledgebase, Log out, Update info



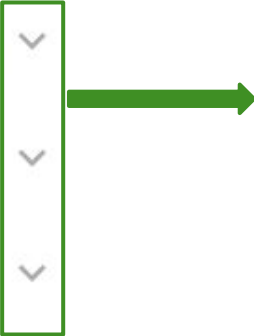
-  Help & videos, Email support & Features Portal
-  Duplicate notifications, credit card failures, and subscription/invoice details
-  Logout and Edit your user

Shows last update – you can update immediately by clicking green **Update**

 Home Constituents Groups Reports Communications Data Tools Settings Kindful

Left-side Navigation Bar

Use this area to access different features of your Donor Management System

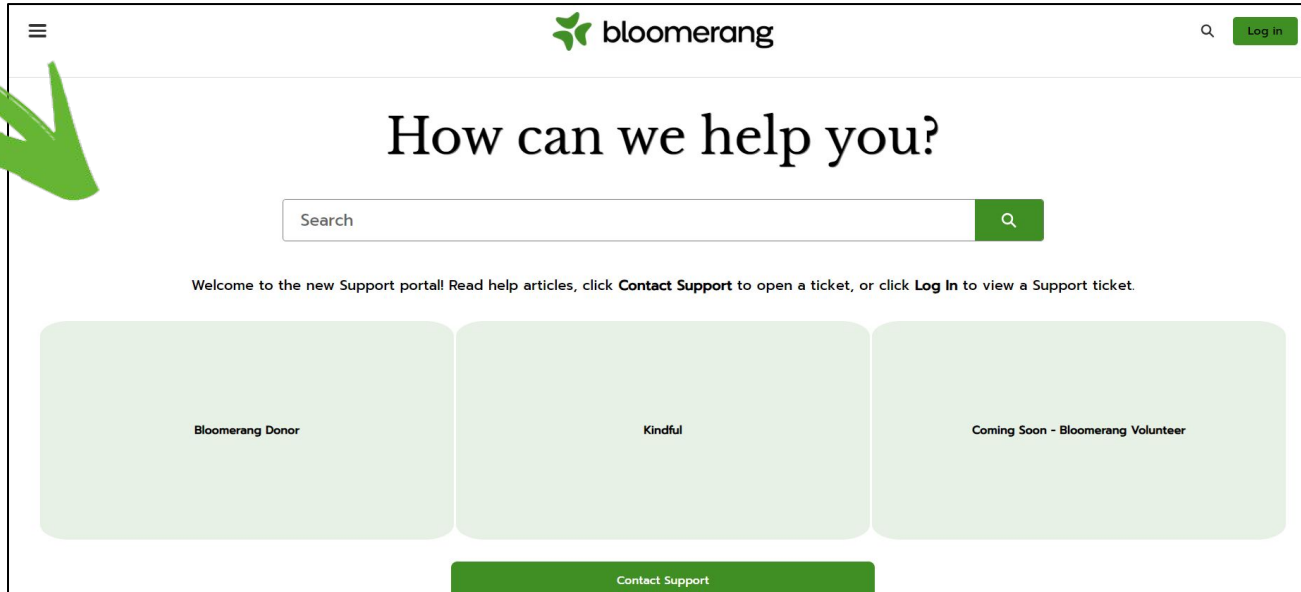
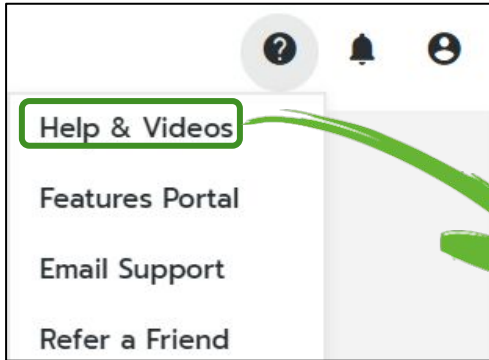










The drop down allows you to see sub-sections of the area

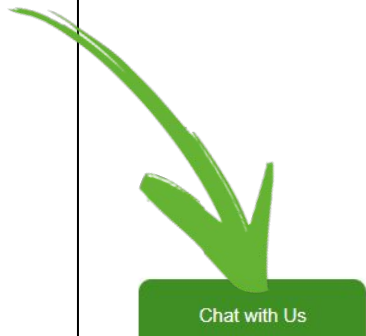
**Into the demo database
we go!**

Resources

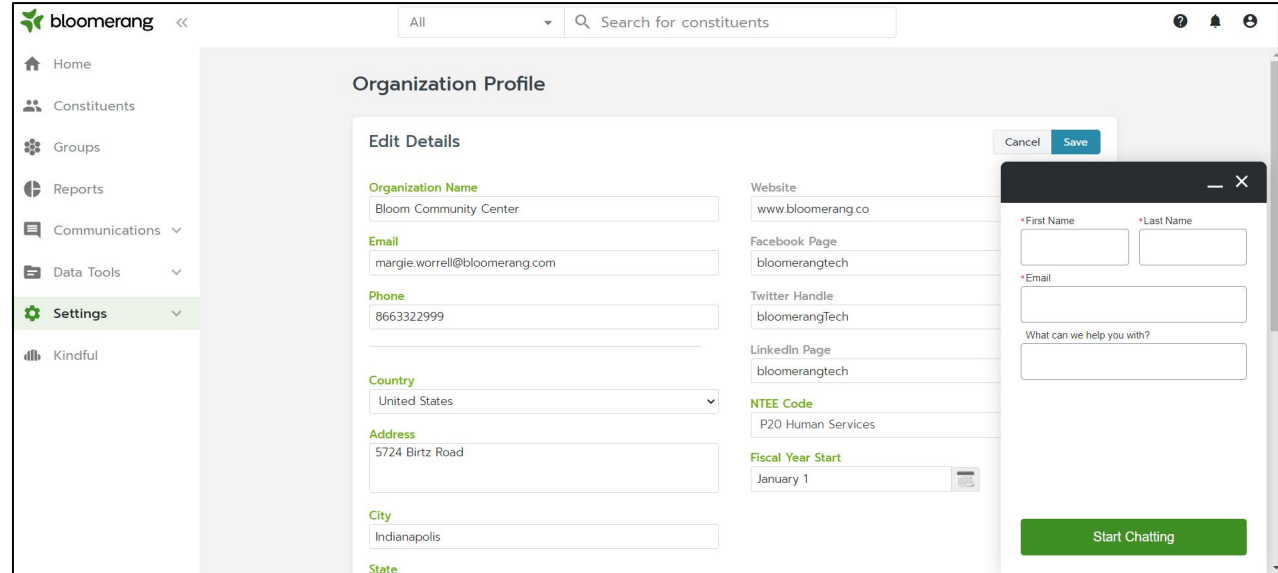
Bloomerang Knowledgebase and Support Portal



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



Live Chat has a new look and a new location!



Organization Profile

Edit Details

Organization Name
Bloom Community Center

Email
margie.worrell@bloomerang.com

Phone
8663322999

Country
United States

Address
5724 Birtz Road

City
Indianapolis

State

Website
www.bloomerang.co

Facebook Page
bloomerangtech

Twitter Handle
bloomerangTech

LinkedIn Page
bloomerangtech

NTEE Code
P20 Human Services

Fiscal Year Start
January 1

Cancel Save

*First Name *Last Name

*Email

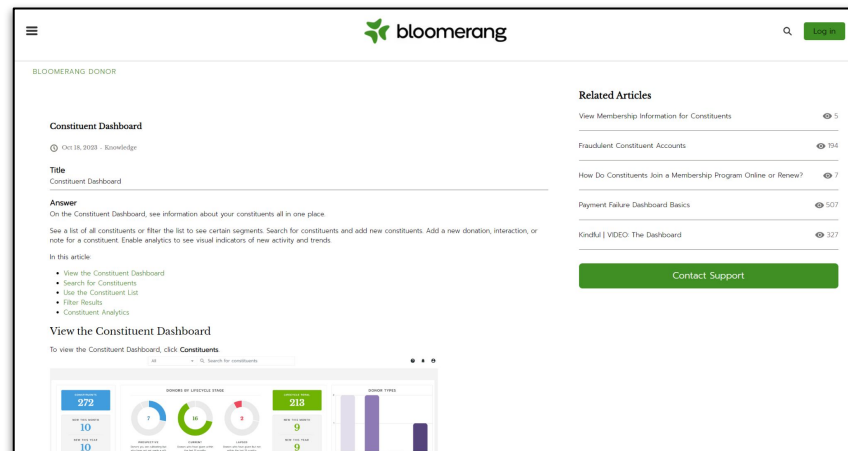
What can we help you with?

Start Chatting



Resources

- [Constituent Dashboard](#)
- [View Dashboard Data on the Home Page](#)
- [Getting Around Bloomerang](#)
- [Search](#)
- [Donor Retention Wheel Basics](#)
- [First-Time Donor Calls Basics](#)
- [Tasks](#)


The screenshot shows a web page for the "BLOOMERANG DONOR" section. The main heading is "Constituent Dashboard" with a sub-heading "Constituent Dashboard". Below this, there is an "Answer" section with a brief description and a list of links: "View the Constituent Dashboard", "Search for Constituents", "Use the Constituent List", "Filter Results", and "Constituent Analytics". A "View the Constituent Dashboard" section follows, with a sub-heading "View the Constituent Dashboard" and a link to "Constituents". At the bottom, there is a dashboard preview showing various metrics: "272" (likely total constituents), "10" (likely new constituents), "10" (likely total new constituents), "218" (likely total constituents), "9" (likely new constituents), and "9" (likely total new constituents). There are also charts and a bar graph. On the right side, there is a "Related Articles" section with links to "View Membership Information for Constituents", "Fraudulent Constituent Accounts", "How Do Constituents Join a Membership Program Online or Renew?", "Payment Failure Dashboard Basics", and "Kindful | VIDEO: The Dashboard". A "Contact Support" button is located at the bottom right of the article content.

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.