

Welcome to Bloomerang Academy

Thank you for joining us!





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









What will we cover today?

Learn all about how online fundraising works and how to set it up and maintain it within Bloomerang!

- 1. Setting up a payment processor
- 2. Fundraising settings for online forms
- 3. Creating an online donation form
- 4. Adding custom fields to forms
- 5. Hosting rules for forms
- 6. Making a donation!



Online Giving

Online fundraising makes it easier to get the donation from the donor via an online giving form you create in Bloomerang....

...and into your database quickly, securely and easily.

bloomerang



Secure giving portal through Bloomerang Payments



How do you make that happen?

- 1. Set up your transaction processor in your Bloomerang database.
- 2. Make sure that your form settings are correct.
- 3. Create an online form to collect donations.
- 4. Test your form.
- 5. Share that form with your stakeholders.
- 6. Run reports to check on how your online fundraising is going.

#1. Set up your payment processor



You will want to go to Settings-> Payments. Here is where you will connect to your transaction processor.

ř	bloomerang «	į	AII		•	Q	Sear	rch for constituents	
A	Home		Good afterno	1	r bloomerang	<<		All	Q Search for constituents
	Constituents		What's happening with Blo		Home				
	Groups			-	Constituents		-		
¢	Reports		AMOUNT RAISED	:::	Groups			Processors	
曰	Communications 🗸		This week	¢	Reports				
6	Data Tools 🗸 🗸		\$0		Communication	5 ~		Exclusive for our customers	Instant setup and approval No monthly fees or setup fees
	Cattingen				Data Tools	\sim			 2.2% + 30¢ per credit card transaction 0.8% + 30¢ per ACH transaction
4	Settings A		This month	\$	Settings	^		Settings	Credit card and ACH support
	Organization		\$9,250		Organization			Disconnect Bloomerang Payments	Real-time tracking Exclusive reporting
	Users				Users				
	Custom Data		This fiscal year	2.	Custom Data			PayPal & Venmo Add-On	Accept more payment methods so you don't miss an opportunity
	Integrations		\$87,635	3.	Integrations			Available for Bloomerang Payments customers	Streamline and improve the donation experience
	Payments		, ,		Payments				 2.2% + 49¢ per transaction Easily integrate with the tools you use to run your organization
	Website Tracking				Website Tracking	ŝ		Connect	Receive donations without risk of sharing payment information



Click Connect to link your database to Bloomerang Payments.

Benefits listed here as well as credit card updates and daily deposits!

Bloomerang Payments RECOMMENDED

Exclusive for our customers

- Instant setup and approval
- No monthly fees or setup fees
- 2.2% + 30¢ per credit card transaction
- 0.8% + 30¢ per ACH transaction
- Credit card and ACH support
- Real-time tracking
- Exclusive reporting

Connect



Connect Bloomerang Payments

To connect Bloomerang Payments, follow these steps in your database (or login and click here):

- 1. Click Settings.
- 2. Click Payments.
- 3. On the Bloomerang Payments tile, click Connect.
- 4. Read the Terms of Use and click I agree to the terms of use.
- 5. Click **Connect**.

Next, you temporarily leave Bloomerang to finish the setup in Stripe.

In Stripe:

Connect to

Bloomerang

Payments

The steps

spelled out!

- 1. Enter your email address and mobile number.
- 2. Click Continue.
- 3. Enter the verification code that was sent to your mobile device.
- 4. Click Enter new business details.
- 5. Click Next.
- 6. Verify that your **Business Details**, **Management and Ownership**, and **Payout Details** are correct.
- 7. Click Submit.

Bloomerang Payments is now connected. Use Bloomerang Payments to process a donation, pledge, recurring donation, or membership payment within Bloomerang or to process donations through online giving forms, membership forms, and event registration forms.



#2. Make sure your Form Settings are correct.

You can upload your organization's logo and a stylesheet for your standard forms. These are used when your website doesn't have a security certificate or CAPTCHA hasn't been enabled in your database and Bloomerang hosts your form.

Anywhere you have placed a standard form, a donor sees a **Donate/Register Securely via Bloomerang** button instead of your form. She clicks the button and is taken to your form placed on a Bloomerang-hosted page.

Both the form and the Bloomerang website are secure, so your donor can be confident that her personal information is safe. Register Securely via 🐳 bloomerang Donate Securely via 🐳 bloomerang

Note: Bloomerang only hosts standard forms.

Host Forms Securely



Form Settings





#3. Create your online form to collect donations





#3. Create your online form to collect donations

Similar to other forms, but requires mapping for the donation

General/Ope	a watin a	
	eraung	**
Add Fund	By adding more than o	e fund, donors will be able to select which one they s
Campaign		
2024 Annual	Fund (G/O Fund)	~
Appeal		
Personal Soli	citation	

Recurring Donations Allow donor to select frequency? Recurring donations will occur monthly Allow donor to select start date? Recurring donations will start immediately						
EFT Allow donation via EFT? Donor can pay with a credit card or bank account.						
Allow donor to offset fees? Donor can choose to cover processing fees						
Donation Levels						
Amount	Amount Impact Statement					
25 Feed 1 cat for 1 week						
250 Buy all new cat beds						
Add New Donation Level						



#4. Test the form

- 1. Publish the form.
- 2. Make donations using the form.
- 3. Clean up.

 Refund the test donations in Bloomerang.

- Run at least one transaction using the live processor and a real credit card, & refund it.
- If you are completely finished testing, contact support@bloomerang.co to clean up the test transactions.

Test your form with:

- One-time donation.
- Recurring donation.
- Donate with different credit card types

Check on these items:

- The success page appears.
- Account is created in Bloomerang, if applicable.
- Donation is added to constituent's timeline.
- Funds and custom fields are recorded correctly.
- Other unique functionality works as expected.

TIP: Enter all test donations on the same constituent's account for easier clean-up.

Share the form with your constituents

Use snippet of code to add this to your website. Then share the URL from your site!

V bloomerang

Publish Form	Hannah's Happy Form	Back to list	Edit
Set Up Website	Tracking and insert it into the HTML of your website in the location where you would like the form to appear. If you have already placed this snippet on your	website, there	is no
How to insert the code : <script src="https://s3</td><td>snippet 🕜
-us-west-2.amazonaws.com/bloomerang-public-cdn/margieworrelldemodb/.widget-js/308224.js" type="text/javascript"></script>			
What Happens	When I Add The Snippet?		
The form will appear dir The button shown below form by adding a CSS st	ectly on your webpage if the page is secure and you have enabled CAPTCHA in Form Settings. The form will inherit the stylings of your webpage. will appear if your webpage is secure but you do not have CAPTCHA enabled, or your webpage is not secure. You can change the styling of the Blo ylesheet in Form Settings.	oomerang-host	ed
Donate Securely via 🐳 bloom	herang		



Run reports to see online giving



Run a transaction or interaction report and filter for online forms. Add other filters as needed to find the data you want.



Into the database we go!



Put relationships at the heart of your fundraising.

Bring together the best of fundraising, volunteer, and donor relationship management with a unified giving platform! Connect with your donor community to raise more donations and build support for your world-changing work.

- + Attract new donors to support your cause and leave lasting impressions throughout their giving experience.
- + Level up your fundraising results and unlock future giving potential by unifying your donor data and tools.
- + Build meaningful relationships with deeper donor insights and time saving tools.



WWW.QGIV.COM

Donation Forms



Included with Giving+





\$180

Average one-time gift made through the Qgiv platform. 50% higher than the industry average.

\$108.56

+25%

Average recurring gift made through the Qgiv platform. 4x higher than the industry average.

Recurring donation prompts increase recurring donations by 25%.

1.5x Improve one-time conversion rates by 1.5x Market State Market St



Donation Forms | Event Registration Text Fundraising | Peer-to-Peer | Auctions



Speed Impacts Conversion Rates

Speed directly correlates to improved conversion rates and more funds for your organization.

Page speed has a major impact:

-4.42%	
-4.42%	

For every additional second of load time, conversion rates drop by 4.42% on average

The length of your form matters too:

Long forms are visually overwhelming

0-2 seconds The highest conversion rates occur on pages that load between 0-2 seconds Splitting the donation process into pieces makes it easier for people to **stay focused**

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https://blog.hubspot.com/marketing/page-load-time-conversion-rates

Multiple Payment Options

Empower donors to give based on their preferences with multiple payment options.



Flexibility **empowers donors to choose** how they pay, no matter where they are.

bloomerang

Digital wallets, like Apple Pay and PayPal/Venmo, **make the payment step fast**.

Donors are **more willing to complete their transaction** when they see their preferred payment options.



5⁺ Improve Donor Retention

Personalization engages donors and builds deeper, meaningful relationships.



Donors *want* to feel valued! 13% of donors stop giving because they weren't thanked.

Personalization **builds connections with donors**. 18% of donors stop giving because of poor service or communication.

Donors are **more likely to stay engaged** with your organization. 36% stop giving because they start giving to another.

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Study by Adrian Sargeant





Included with Giving+

Why Event Tools?

Keep registrants focused on registration with a distraction-free, mobile-optimized registration form.

- Use built-in promo codes, early bird specials, and other discounts to increase ticket sales.
- Encourage more donations by adding a donate button on your event page and in the registration process.
- Enhance your check-in process with QR code tickets, table and seating management, and an event management app.





Giving+* \$479 annually

Includes:

- + Unlimited donation forms and event registration
- + Integration from Qgiv to Bloomerang
- + Text-to-Donate
- + Table and seating management
- + Enhanced donation and event features

*Does not include outbound messaging, peer-to-peer, or auctions

Outbound Messaging \$129^{/MO} OR \$297^{/QTR} Save \$90

2,000 outbound messages per month | Overage is 2.5 cents per message (does not include messages for pledged gifts)

PROCESSING FEE: 4.95% (Qgiv + Merchant)

Peer-to-Peer

\$259/MO OR \$687/QTR Save \$90

\$259^{/MO} OR \$687^{/QTR} Save \$90

Auctions

- \$0.30 per transaction
 - Add 1% for American Express

✓ ECHECK FEE:

- 2.95% (Qgiv + Merchant)
- \$0.95 per transaction

✓ PROCESSING FEE:

- 3.95% (Qgiv + Merchant)
- \$0.30 per transaction
- Add 1% for American Express

✓ ECHECK FEE:

- 1.95% (Qgiv + Merchant)
- \$0.95 per transaction

Donation Forms | Event Registration Text Fundraising | Peer-to-Peer | Auctions



Membership Management in Bloomerang

What will this look like?

Let's take a quick tour!





Move from Custom Membership Tracking to the Membership Management Add-On

Plan Your Membership Program

Membership Groups

<u>Create and Manage Membership</u> <u>Forms</u>

How Do Constituents Join a Membership Program Online or Renew?





Resources

Bloomerang Knowledgebase and Support Portal





Live Chat has a new look and a new location!

🐳 bloomerang 🛛 «	All	tuents	0 🖡
A Home	Organization Profile		
Constituents			
Sroups	Edit Details		Cancel Save
Reports	Organization Name	Website	_
	Bloom Community Center	www.bloomerang.co	* First Name *Last Name
E Communications 🗸	Email	Facebook Page	
🛱 Data Tools	margie.worrell@bloomerang.com	bloomerangtech	
	Phone	Twitter Handle	*Email
🗘 Settings 🗸 🗸	8663322999	bloomerangTech	
		linkedIn Page	What can we help you with?
di) Kındful	Country	bloomerangtech	
	United States 🗸	NTEE Code	
	Address	P20 Human Services	
	5724 Birtz Road	Fiscal Year Start	
		January 1	
	City		
	Indianapolis		Start Chatting
	State		





Resources

Knowledgebase

- **Get Started with Online Giving** (walks through all steps)
- Host Forms Securely
- <u>Create Online Giving Forms</u>
- <u>Create Event Registration Forms</u>
- Edit Forms
- Test Forms with Credit Card Transactions
- How is True Impact calculated when an online donor
 offsets processing fees?







Thank you for attending!

Visit our website to see more upcoming Bloomerang Academy webinars!

