


Large, vibrant green Monstera leaves with characteristic splits, positioned in the top-left corner of the slide.

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!

A partial view of a green Monstera leaf with splits, located 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 v

Hide Subtitle

View Full Transcript

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!

Poll

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.



Working with Constituents Part 1



Constituent Dashboard overview

Individual vs. Organization Constituents

Parts of a Constituent Account

1. Header
2. Summary
3. Profile
4. Timeline
5. Relationships (we will cover this in Part 2)

Create, edit and delete individual and organizational constituents

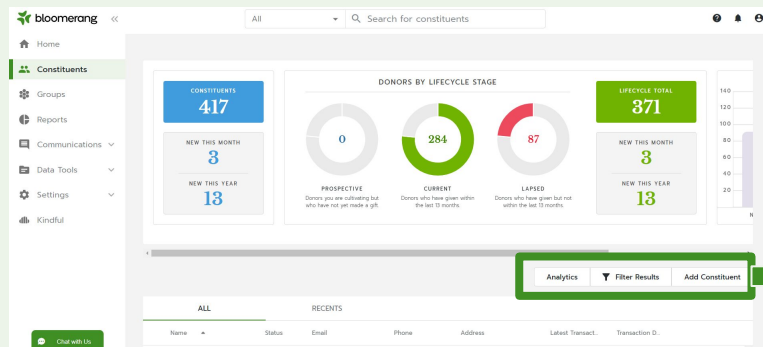
**What will we
cover today?**

Analytics section



Constituent Dashboard overview

Filter Results



Filter Results By:

(0) Reset All Filters

Constituents

TYPES:

Individual Organization Household

STATUS:

Active Inactive Deceased

Bloomerang Donor Groups

DONOR LIFECYCLE STAGE:

Prospective Current Lapsed

DONOR TYPES:

New Retained Recaptured Recurring

Name

Search

Name

Account Number

Head of Household

Primary Contact

Email

+

Phone Number

+

Address

+

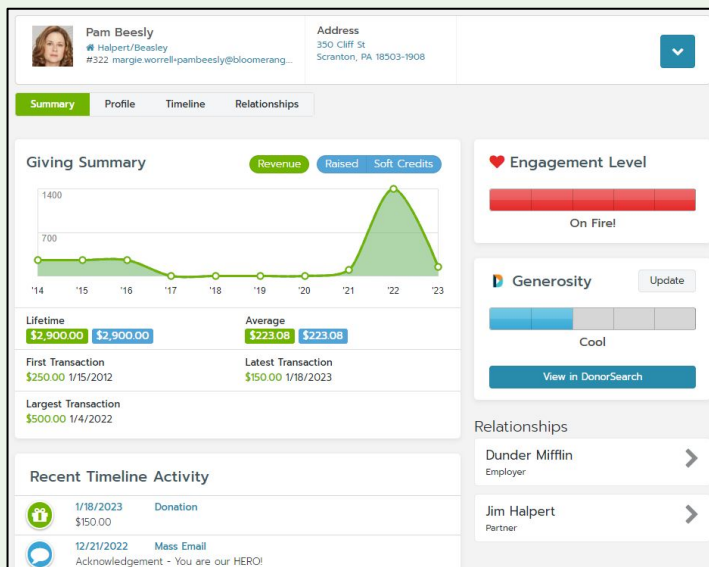
Employer

+

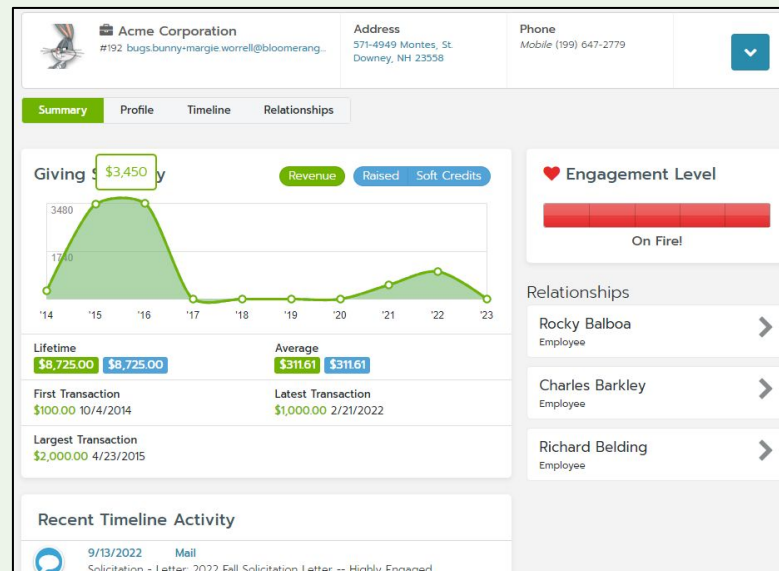
Constituent types

Two flavors—Individual and Organization

Individual



Organization



Constituent Header and Tabs



Acme Corporation

#192 bugs.bunny+margie.worrell@bloomerang...

Address

571-4949 Montes, St.
Downey, NH 23558

Phone

Mobile (199) 647-2779



Summary

Profile

Timeline

Relationships



Pam Beesly

Halpert/Beasley

#322 margie.worrell+pambeesly@bloomerang...

Address

350 Cliff St
Scranton, PA 18503-1908



Summary

Profile

Timeline

Relationships



Lucille Austero

#135

DECEASED

Address

22800 Pelican Hill Rd S
Newport Coast, CA 92657-...

Phone

Mobile (749) 567-0966



Summary

Profile

Timeline

Relationships


Edit



Constituent Header and Tabs


Summary tab

- Giving Summary
- Recent Timeline
- Engagement Level
- Generosity Score
- Relationships



Pam Beesly
Helpert/Beasley
#322 mergie.worrell-pambeesly@bloomerang...

Address
350 Cliff St
Scranton, PA 18503-1908



Summary


Profile

Timeline

Relationships


Giving Summary


Revenue Raised Soft Credits





Lifetime	\$2,900.00	Average	\$223.08
First Transaction	\$250.00 1/15/2012	Latest Transaction	\$150.00 1/18/2023
Largest Transaction	\$500.00 1/4/2022		


Recent Timeline Activity


 1/18/2023 \$150.00 Donation


 12/21/2022 Mass Email Acknowledgement - You are our HERO!


 12/1/2022 Email Volunteer Activity - Volunteer opportunity


 11/29/2022 \$100.00 Donation


 11/29/2022 In Person Volunteer Activity - Volunteering

 11/29/2022 In Person Volunteer Activity - Volunteering

 11/29/2022 Mass Email Solicitation - Give Today to Help Bloom Community Center!


 11/29/2022 In Person Volunteer Activity - Volunteering

 11/18/2022 Mass Email Special Event - The big day is almost here!

 10/27/2022 Mass Email Acknowledgement - Thanks for Donating! You are cool!

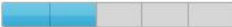
[Go to Timeline](#)

Engagement Level



On Fire!

Generosity



Cool

[View in DonorSearch](#)

Relationships


Dunder Mifflin
Employer

Jim Halpert
Partner

Constituent Header and Tabs

Profile tab

- Information area
- Click **Edit** to revise
 - Can also merge, change type or delete
- Custom fields show up here
- *Created* and *Last Modified* info at the bottom



Pam Beesly


Helpart/Beasley

#222_margie_worrell-pambeesly@bloomerang..

Address

350 Cliff St

Scranton, PA 18503-1908



Summary

Profile

Timeline

Relationships

Edit

▼

Basic Info

Status

Active

Informal Name

Pam

Formal Name

Ms. Beesly

Envelope Name

Ms. Pam Beesly

Recognition Name

Ms. Pam Beesly

Addresses

Home **Primary**

350 Cliff St

Scranton, PA 18503-1908

Work

1433 N Main Ave, Scranton, PA

Scranton, PA 18508

Emails

Home **Primary**

margie.worrell-pambeesly@bloomerang.com

Home

test-pambeesly@bloomerang.co

Phone Numbers

Communication Preferences

Preferred Channel

Mail

Restrictions

Do Not Call

Email Interests

The constituent will receive all emails

Personal Information

Facebook

Twitter

LinkedIn

Website

www.dundermifflin.com

Gender

Female

Birthdate

Employer

Dunder Mifflin

Job Title

Facebook

Twitter

LinkedIn

General Info

Attributes

Member, Volunteer

Committees

Board Membership

Organization Type

General Info

Attributes

Member, Volunteer

Committees

Board Membership

Organization Type

Food

Allergies

Prospect Management Info

Giving Capacity

Matching Gift contribution

Solicitor

Volunteer Info

Interests

Events

Skills and Talents

Availability

Day, Weekends

Important Causes

Cause Interests

Animal welfare, Environmental issues, Housing

Constituent Header and Tabs

Timeline tab

- Can switch to list view
- Can filter on right by type
- Icons match type
- Click on year on right to go to that year
- Highlights show major moments

Pam Beesly
Halpert/Beasley
#322 margie.worrell+pambeesly@bloomerang...

Address
350 Cliff St
Scranton, PA 18503-1908

Summary Profile **Timeline** Relationships List View

2023

- \$150.00 Donation** January 18
General/Operating
2023 Membership Drive Campaign

Highlights

- Downgraded from \$1,400.00 to \$150.00
- Has donated 3 years in a row

2022

- Mass Email** December 21
Acknowledgement - You are our HERO!
- Email** December 1
Volunteer Activity : Volunteer opportunity
- \$100.00 Donation** November 29
General/Operating
- In Person** November 29
Volunteer Activity - Volunteering
- In Person** November 29
Volunteer Activity - Volunteering

Highlights

- Upgraded from \$100.00 to \$1,400.00
- Has donated 2 years in a row






2023
2022
2021
2020
2019
2018
2017
2016
2015
2014
Older

All

Transactions
Interactions
Tasks Notes
Attachments

Timeline Icons


Timeline Icons

Timeline Entry Type	Icon
Transaction	
Interaction	
Note	
Task	
Has attachment	

Constituent Header and Tabs

Relationships tab

- Shows household relationships
- Shows employer relationship
- Shows other relationships with people in your database




Pam Beesly

Halpert/Beasley

#322 margie.worrell+pambeesly@bloomerang...

Address

350 Cliff St
Scranton, PA 18503-1908






Summary

Profile

Timeline




Relationships

 Halpert/Beasley

Jim Halpert	Head of Household	
Pam Beesly	Member	

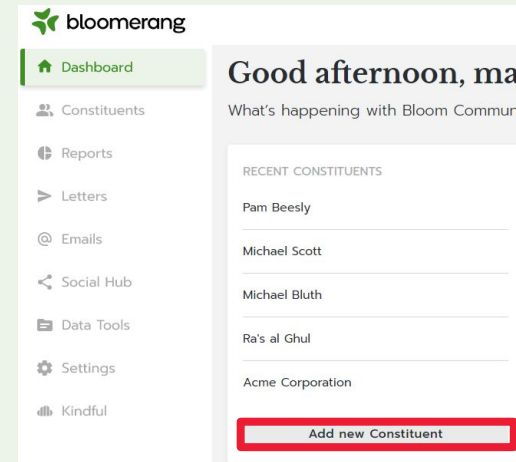
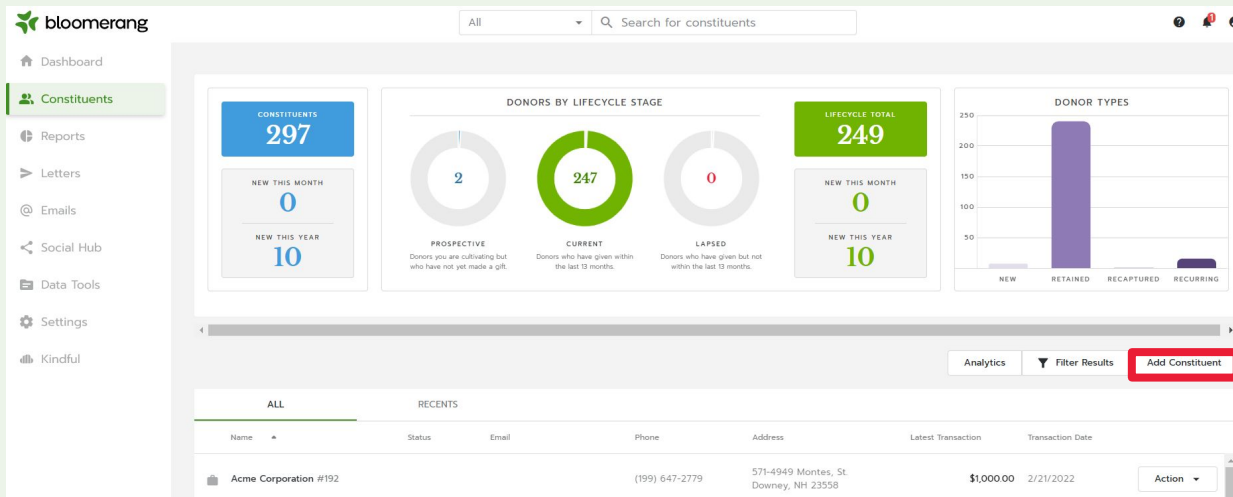
Relationships

New Relationship

Dunder Mifflin	Employer	
Jim Halpert	Partner	
Michael Bluth	Friend	

Add a constituent

More than one way!



PRO TIP: Search for an account with that name before you add a new constituent to cut down on duplicates!

New Constituent

What type of Constituent are you creating?

Individual

An individual Donor, Volunteer, Contact, etc.

New

Organization

A company or organization account with a primary contact.

New

New Individual

Edit Details

Title

First Middle Last Suffix

Informal Name

Formal Name

Envelope Name

Recognition Name

Save

Personal Information

Gender

Birthdate

Employer

Job Title

Contact Information

Country

Address

City

State

Zip Code

Type

Email

Type

Phone

Type

Facebook Page

Twitter Handle

LinkedIn Page

Website

Communication Preferences

Preferred Channel

Restrictions

Do Not Call

Do Not Mail

Do Not Solicit

Volunteer Info

Skills and Talents

Availability

Day

Evening

Weekends

Activity

Accounting support

Cleaning

Data Entry

Delivery Driver

Events

Front desk support

Fundraising

Giving Tuesday volunteer

Outdoor work

Program support

Cause Interest Info

Cause Interests

Animal welfare

Education

Environmental issues

Food insecurity

Health

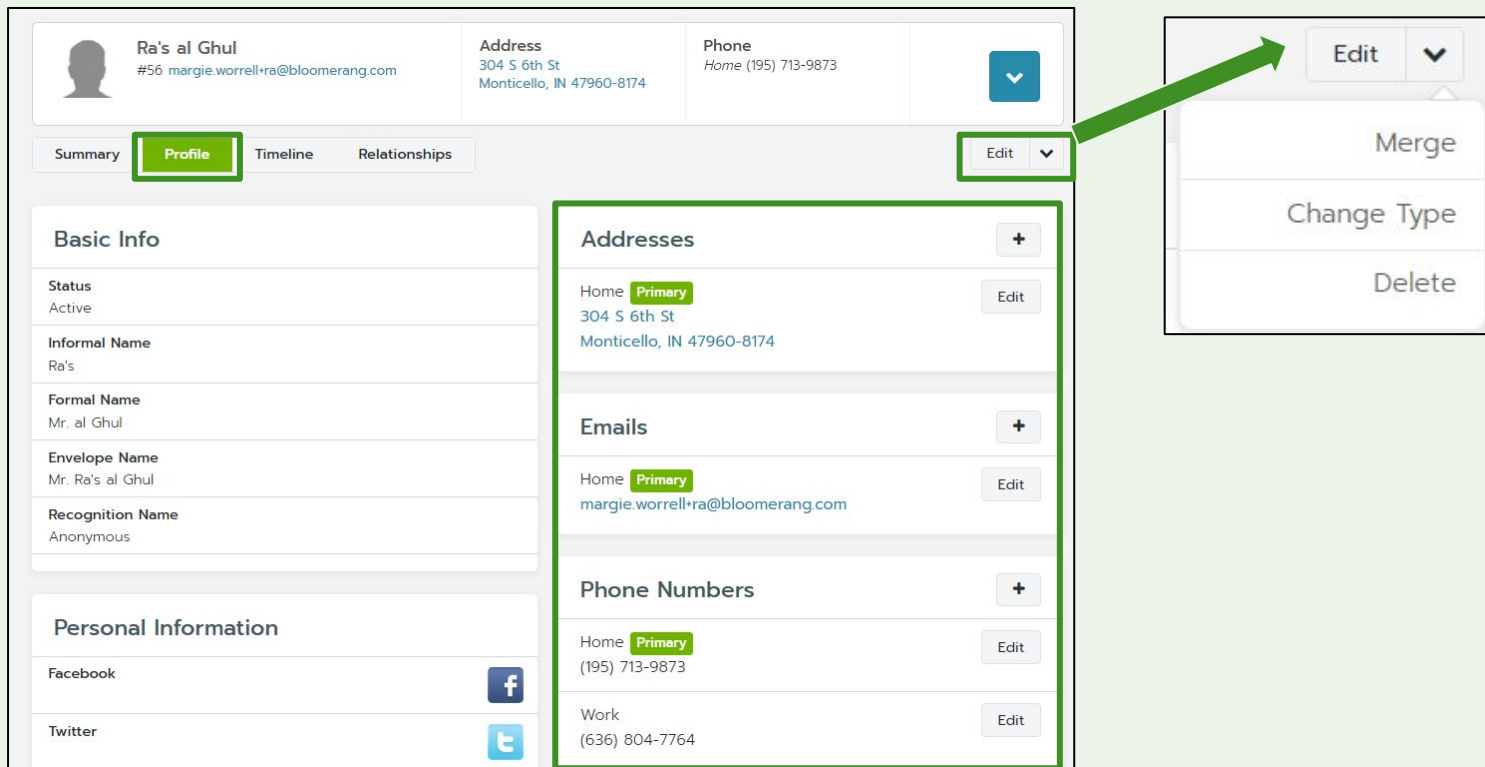
Housing

Workforce development

You will fill in the demographic information and then any custom fields you have created.

Edit a constituent

Profile tab → Edit



The screenshot shows the Bloomerang constituent profile page for Ra's al Ghul. The page is divided into several sections: Basic Info, Personal Information, Addresses, Emails, and Phone Numbers. The 'Profile' tab is selected, and the 'Edit' button is highlighted. A green arrow points from the 'Edit' button to a dropdown menu that is open, showing options: Merge, Change Type, and Delete.

Constituent Profile: Ra's al Ghul

Header: Ra's al Ghul, #56 margie.worrell+ra@bloomerang.com, Address: 304 S 6th St, Monticello, IN 47960-8174, Phone: Home (195) 713-9873

Tabs: Summary, **Profile**, Timeline, Relationships

Buttons: Edit (dropdown)

Basic Info

- Status: Active
- Informal Name: Ra's
- Formal Name: Mr. al Ghul
- Envelope Name: Mr. Ra's al Ghul
- Recognition Name: Anonymous

Personal Information

- Facebook
- Twitter

Addresses

- Home (Primary): 304 S 6th St, Monticello, IN 47960-8174 (Edit)

Emails

- Home (Primary): margie.worrell+ra@bloomerang.com (Edit)

Phone Numbers

- Home (Primary): (195) 713-9873 (Edit)
- Work: (636) 804-7764 (Edit)

Edit Menu:

- Edit
- Merge
- Change Type
- Delete

Merge a constituent

Profile tab—merge

Possible Duplicates for Bob Belcher #377

Displaying 1 - 2 of 2

Bob Loblaw Esq. #137	9288 Enim Ave Newport Beach, CA 92360
Bobby Brady #16	4222 Clinton Way Brooklyn, NY 11222

Merge

Change Type

Delete

Note: Constituents can only be merged if they are the same account type. To merge individuals and organizations, change the account type to match, and then merge.

Change type

Profile tab—change type

Change Type to Organization

Organization

Name

Primary Contact

Title

Mr.

Informal Name

Ra's

First

Ra's

Middle

Formal Name

Mr. al Ghul

Last

al Ghul

Envelope Name

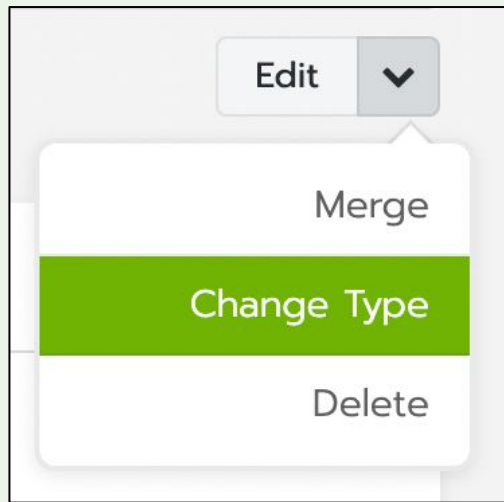
Mr. Ra's al Ghul

Suffix

Recognition Name

Cancel

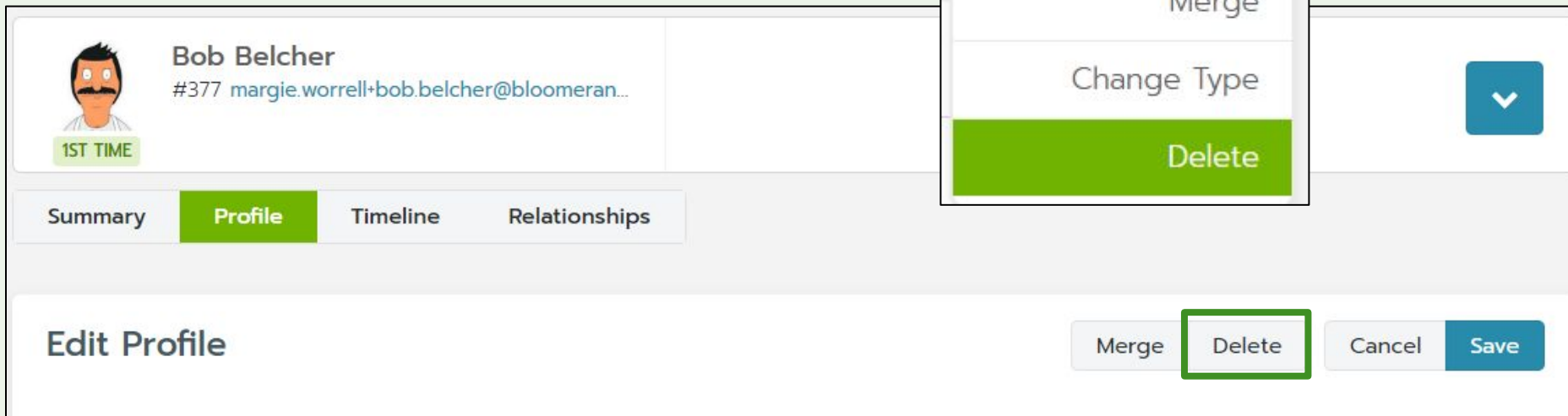
OK



Note: Can be used if you entered someone in as an individual, but realize that they should have been entered as a contact for an organization.

Delete a constituent

Profile tab



Bob Belcher
#377 margie.worrell+bob.belcher@bloomeran...

1ST TIME

Summary Profile Timeline Relationships

Edit Profile

Merge Change Type Delete

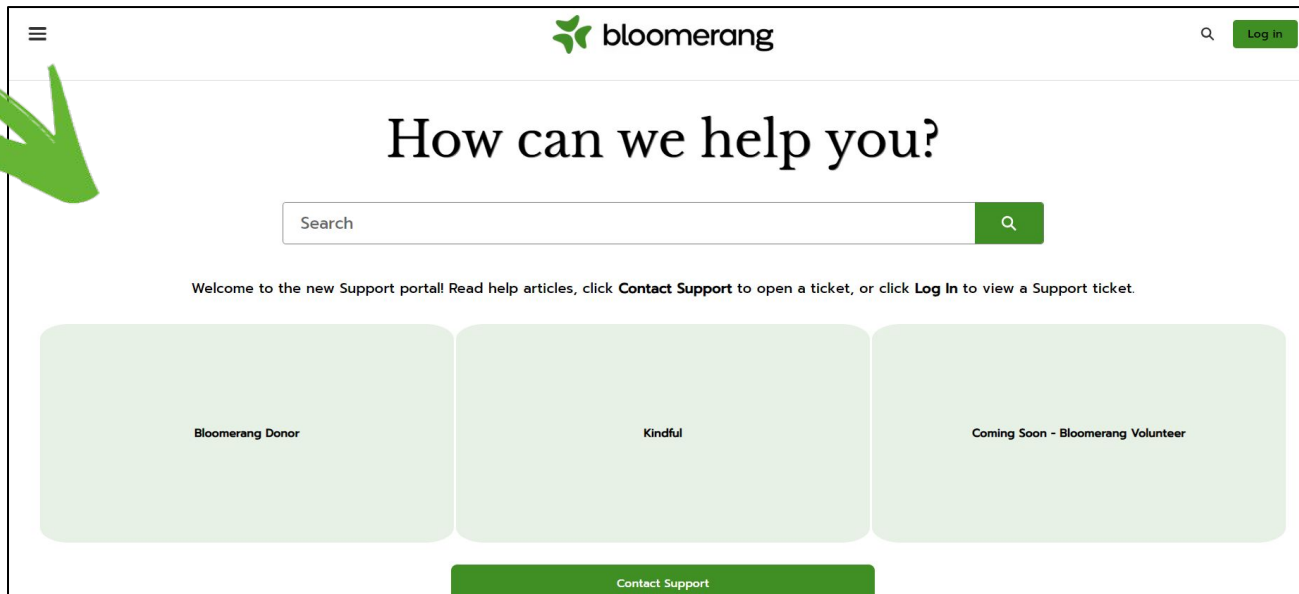
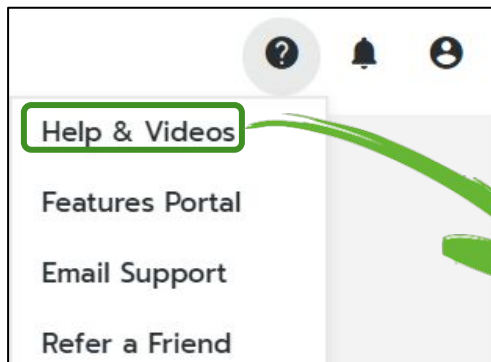
Merge Delete Cancel Save

Warning: If the constituent has any transactions, you must delete the transaction data before you can use the Delete button on the Profile page to delete the account. To delete a constituent and transactions at the same time, you must use the Mass Delete tool.

Into the database we go!

Resources

Bloomerang Knowledgebase and Support Portal



Live Chat has a new look and a new location!

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

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

Chat with Us

Resources

Constituents

Constituent Dashboard

Create Constituents

Edit, Merge and Delete Constituents

Summary Page

Timeline

Notes

Interactions

Add and Manage Profile Pictures

Constituent Dashboard

Review and Merge Duplicate

Constituents

Bulk Delete Constituents





Thank you for attending!

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

Visit our website to see more upcoming
Bloomerang Academy webinars!

