

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 Monstera leaf, 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 w

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 2



What will we cover today?

Relationships

- Add Relationship to Constituent
- Edit or Remove Constituent Relationships
- Edit Relationship Roles
- Creating a new relationship role

Households

- The Household Profile
 - Header
 - Status/Type
- Primary contact information
 - Summary
 - Profile
 - Timeline
 - Relationships
- Head of Household
- Create a Household
- Add and Remove Household Members
- Change Head of Household
- Edit Household Name Data
- Delete a Household

Reporting on Relationships and Households

Why add this data to our database?

1. Enhanced communication and stewardship
2. Improved targeting of messages
3. More accurate data and better analytics
4. Improved networking and opportunity expansion

Relationships



Add a relationship



Mary Bailey
#385



Summary

Profile

Timeline

Relationships

Household

Mary Bailey is not in a Household

Join Household

New Household

Relationships

New Relationship

Add a relationship

Find Constituent ✕

George

Displaying 1 - 5 of 5

George Jungle #318	1010 Tarzan Ln Newton Falls, OH 44444
George Weasley #30	The Burrow Ottery St. Catchpole
George Bluth #132	Attic 5 Sudden Valley Ln Mount Wilson, CA 91023
George Bailey #172	8448 Us-9 Pottersville, NY 12860
George Louis Costanza M.D. #83	784-4609 Lobortis Rd New Orleans, LA 70139

Don't forget to click save!



Summary Profile Timeline **Relationships**

New Relationship

George Bailey is the...
Husband

Mary Bailey is the...
Wife

Note

Add a relationship



Mary Bailey
#385



Summary

Profile

Timeline

Relationships

Household

Join Household

New Household

Mary Bailey is not in a Household

Relationships

New Relationship

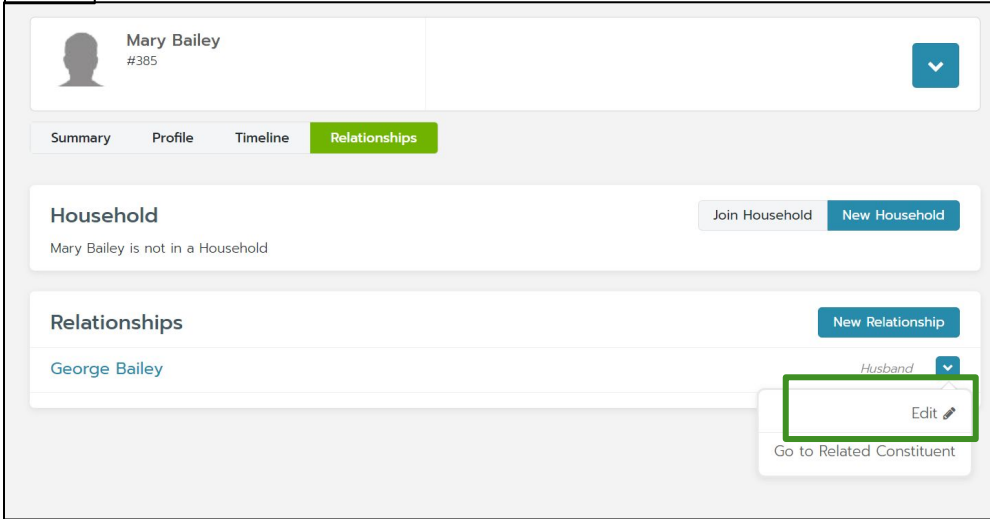
George Bailey

Husband



Edit or remove a relationship

1.



Mary Bailey
#385

Summary Profile Timeline **Relationships**

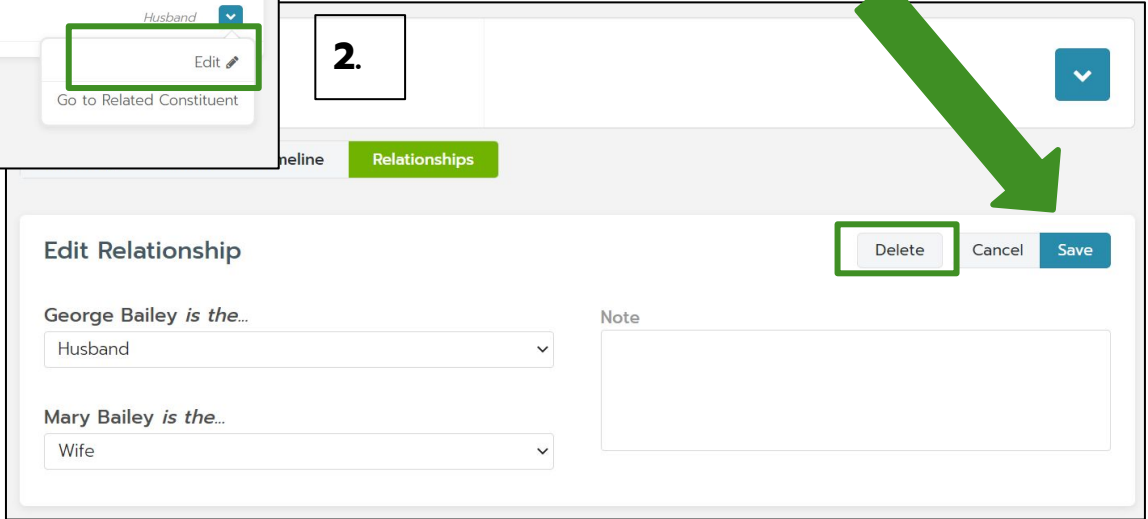
Household Join Household New Household
Mary Bailey is not in a Household

Relationships New Relationship

George Bailey Husband Edit
Go to Related Constituent

Don't forget to click save!

2.



Timeline **Relationships**

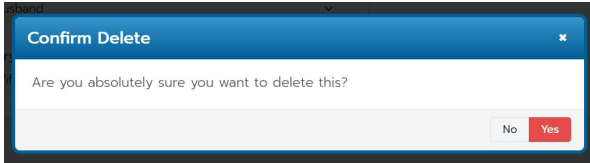
Edit Relationship Delete Cancel Save

George Bailey *is the..*
Husband

Mary Bailey *is the..*
Wife

Note

3.



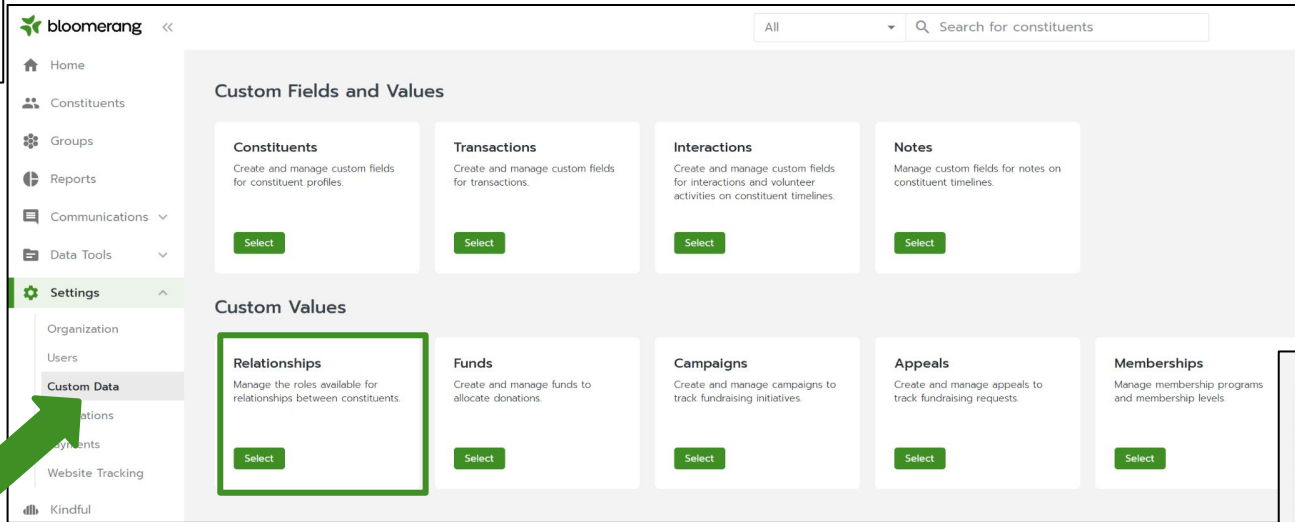
Confirm Delete

Are you absolutely sure you want to delete this?

No Yes

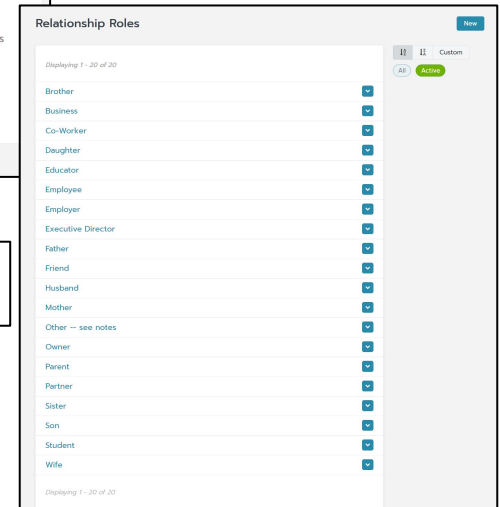
Edit relationship roles

1.



The screenshot shows the Bloomerang interface. On the left is a navigation sidebar with the following items: Home, Constituents, Groups, Reports, Communications, Data Tools, Settings (highlighted with a green arrow), Organization, Users, Custom Data (highlighted with a green arrow), Donations, Payments, Website Tracking, and Kindful. The main content area is titled "Custom Fields and Values" and is divided into two sections: "Custom Fields and Values" and "Custom Values". The "Custom Fields and Values" section contains four cards: "Constituents" (Create and manage custom fields for constituent profiles), "Transactions" (Create and manage custom fields for transactions), "Interactions" (Create and manage custom fields for interactions and volunteer activities on constituent timelines), and "Notes" (Manage custom fields for notes on constituent timelines). Each card has a green "Select" button. The "Custom Values" section contains five cards: "Relationships" (Manage the roles available for relationships between constituents), "Funds" (Create and manage funds to allocate donations), "Campaigns" (Create and manage campaigns to track fundraising initiatives), "Appeals" (Create and manage appeals to track fundraising requests), and "Memberships" (Manage membership programs and membership levels). Each card has a green "Select" button. A green box highlights the "Relationships" card in the "Custom Values" section.

2.



The screenshot shows the "Relationship Roles" configuration page. At the top right, there is a "New" button. Below it, there are tabs for "All" and "Active", with "Active" selected. The main area is a list of relationship roles, each with a dropdown arrow on the right. The roles listed are: Brother, Business, Co-Worker, Daughter, Educator, Employee, Employer, Executive Director, Father, Friend, Husband, Mother, Other -- see notes, Owner, Parent, Partner, Partner, Sister, Son, Student, and Wife. At the bottom right, there is a "Custom" button. The page also shows "Displaying 1 - 20 of 20" at the top and bottom.

Edit relationship roles

Relationship Roles (New)

Edit Details Cancel Save

Name

Active?

Create a new role...

Displaying 1 - 16 of 16

Brother	
Business	Edit 
Co-Worker	Deactivate 


Or click on the blue dropdown arrow to edit or deactivate a role.

Households



Household profiles components

Header


	Halpert/Beesly #312 test+jim.halpert@bloomerang.co	Address 2345 Dunder Dr Scanton, NJ 11111	Phone <i>Mobile (654) 272-4446</i>	
---	--	---	--	--

- Would show **Inactive or Deceased** only if **ALL** constituents in the household had been marked as such.
- Would show **First-time Donor** if a member gives for the first time and **no other member** has any donations.
- Primary contact information is pulled from the head of the household.
- **Head of Household** should be the member who has the strongest relationship with your organization and has contact information in the system.

Household profiles components

Summary

- Shows all combined data from all members of the household.
- **Household Members** area is linked to individual constituent profiles.

 **Halpert/Beesly**
#312 test-jim.halpert@bloomerang.co


Address
2345 Dunder Dr
Scanton, NJ 11111

Phone
Mobile (654) 272-4446

Summary Profile Timeline Relationships

Giving Summary

Revenue Raised Soft Credits



Year	Revenue	Raised	Soft Credits
'14	3130		
'15	3130		
'16	3130		
'17	3130		
'18	3130		
'19	3130		
'20	3130		
'21	3130		
'22	6260		
'23	3130		

Lifetime
\$8,500.00 \$8,500.00



Average
\$369.57 \$369.57

First Transaction
\$250.00 1/15/2012


Latest Transaction
\$150.00 1/18/2023

Largest Transaction
\$2,000.00 9/1/2022

Recent Timeline Activity

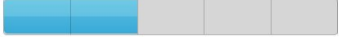
	1/18/2023	Donation
	\$150.00	
	1/18/2023	Donation
	\$150.00	

Engagement Level



On Fire!

Generosity Update



Cool

[View in DonorSearch](#)

Household Members

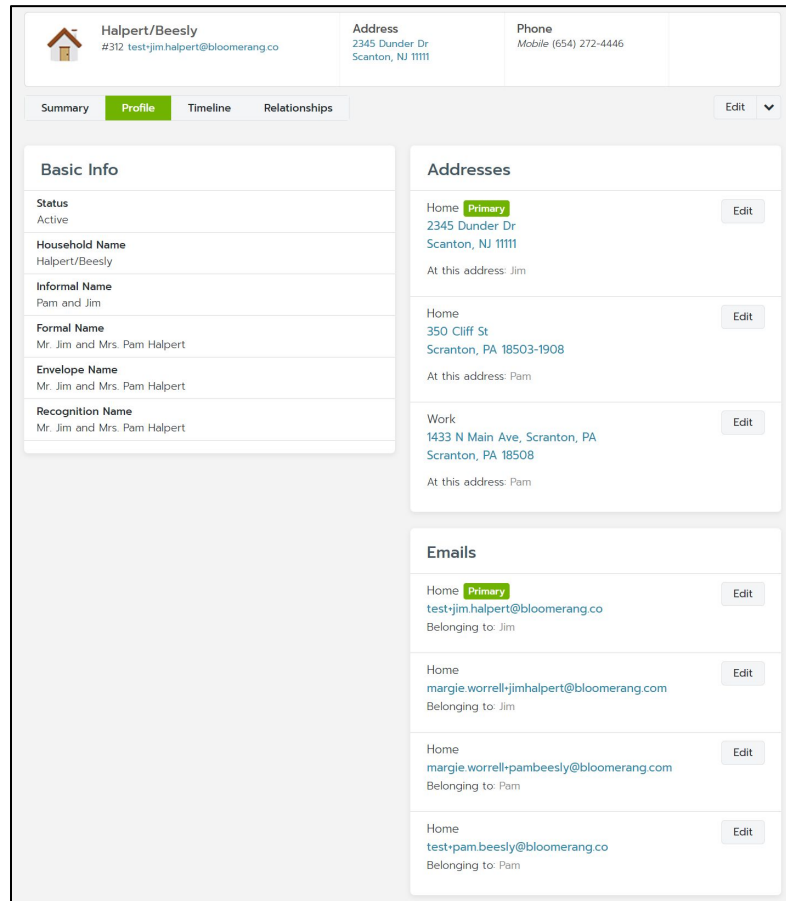
Jim Halpert ➤
Head of Household

Pam Beesly ➤
Partner

Household profiles components

Profile

- Basic Info is unique to the household and can be edited.
- Addresses, Emails, and Phone Numbers are pulled from all members of the household.
- Communication preferences are set to what is shared across **ALL** household members.



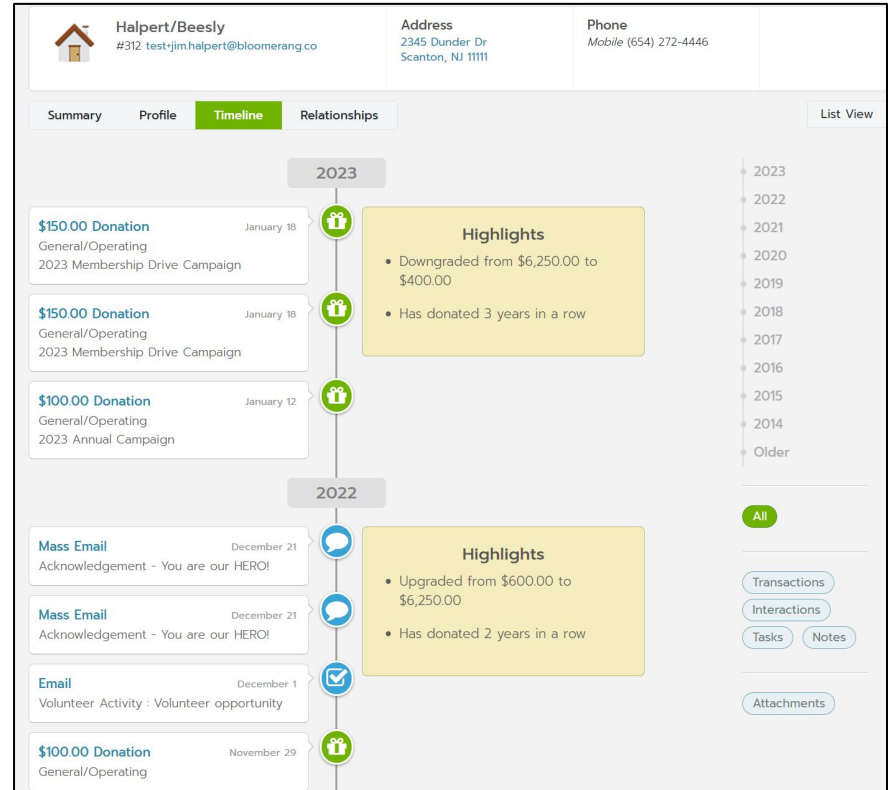
The screenshot displays the 'Profile' tab for a household named 'Halpert/Beesly'. The page is organized into several sections:

- Header:** Household name 'Halpert/Beesly' with email '#312 test-jim.halpert@bloomerang.co'. Address: '2345 Dunder Dr, Scanton, NJ 11111'. Phone: 'Mobile (654) 272-4446'.
- Navigation:** Tabs for 'Summary', 'Profile' (active), 'Timeline', and 'Relationships'. An 'Edit' button is visible.
- Basic Info:** A list of household details:
 - Status: Active
 - Household Name: Halpert/Beesly
 - Informal Name: Pam and Jim
 - Formal Name: Mr. Jim and Mrs. Pam Halpert
 - Envelope Name: Mr. Jim and Mrs. Pam Halpert
 - Recognition Name: Mr. Jim and Mrs. Pam Halpert
- Addresses:** A list of addresses with 'Edit' buttons:
 - Home (Primary): 2345 Dunder Dr, Scanton, NJ 11111. At this address: Jim
 - Home: 350 Cliff St, Scranton, PA 18503-1908. At this address: Pam
 - Work: 1433 N Main Ave, Scranton, PA 18508. At this address: Pam
- Emails:** A list of email addresses with 'Edit' buttons:
 - Home (Primary): test-jim.halpert@bloomerang.co. Belonging to: Jim
 - Home: margie.worrell-jimhalpert@bloomerang.com. Belonging to: Jim
 - Home: margie.worrell-pambeesly@bloomerang.com. Belonging to: Pam
 - Home: test-pam.beesly@bloomerang.co. Belonging to: Pam

Household profiles components

Timeline

- Combined entries from **ALL** members of the household.
- When you click into the interaction it will show the member that engaged in the activity.



The screenshot displays the Bloomerang interface for a household profile. At the top, the household name is "Halpert/Beesly" with contact information: #312, test:jim.halpert@bloomerang.co, Address: 2345 Dunder Dr, Scanton, NJ 11111, and Phone: Mobile (654) 272-4446. Below this, there are tabs for "Summary", "Profile", "Timeline" (which is selected), and "Relationships". A "List View" button is also present.

The timeline is organized by year, with 2023 and 2022 visible. For 2023, there are three donation entries:

- \$150.00 Donation** (January 18): General/Operating, 2023 Membership Drive Campaign.
- \$150.00 Donation** (January 18): General/Operating, 2023 Membership Drive Campaign.
- \$100.00 Donation** (January 12): General/Operating, 2023 Annual Campaign.

A yellow "Highlights" box for 2023 contains the following information:

- Downgraded from \$6,250.00 to \$400.00
- Has donated 3 years in a row

For 2022, there are four entries:

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

A yellow "Highlights" box for 2022 contains the following information:

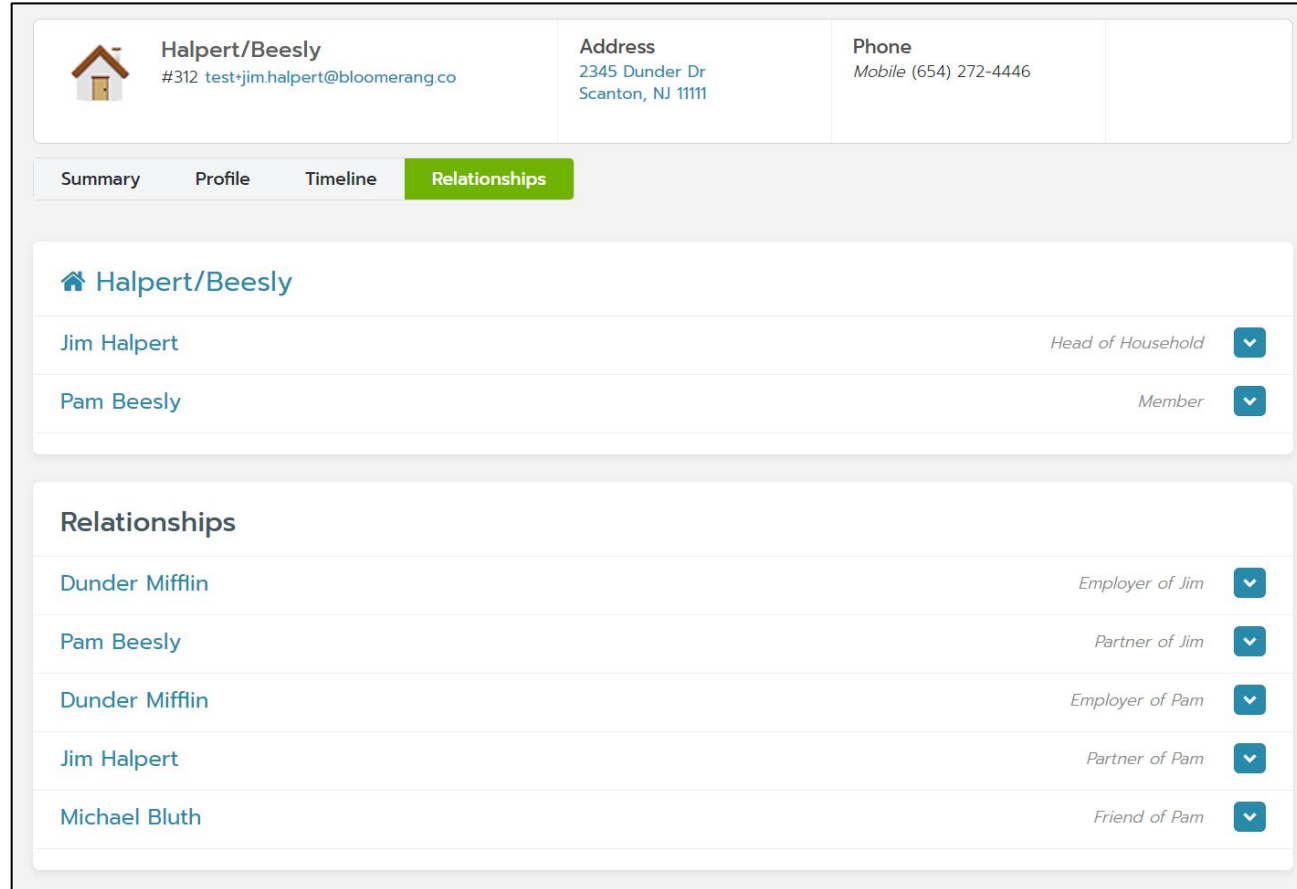
- Upgraded from \$600.00 to \$6,250.00
- Has donated 2 years in a row

On the right side of the timeline, there is a vertical scroll bar with years from 2023 down to 2014, and an "Older" link. Below the scroll bar are several filter buttons: "All" (selected), "Transactions", "Interactions", "Tasks", "Notes", and "Attachments".

Household profiles components

Relationships

- Shows all existing relationships starting with the head of the household.



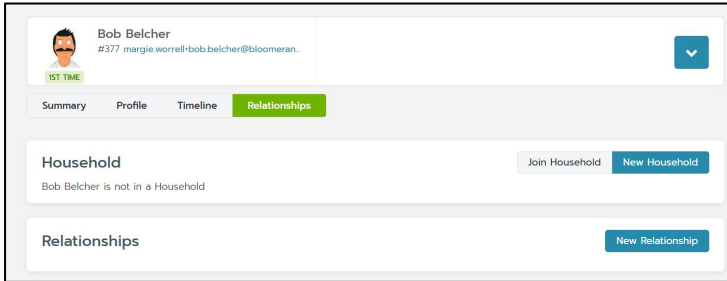
The screenshot displays a user interface for a household profile. At the top, there is a header section with a house icon, the name 'Halpert/Beesly', and the email address '#312 test+jim.halpert@bloomerang.co'. To the right, there are fields for 'Address' (2345 Dunder Dr, Scanton, NJ 11111) and 'Phone' (Mobile (654) 272-4446). Below the header is a navigation bar with tabs for 'Summary', 'Profile', 'Timeline', and 'Relationships' (which is highlighted in green). The main content area is divided into two sections. The first section, titled 'Halpert/Beesly', lists household members: 'Jim Halpert' (Head of Household) and 'Pam Beesly' (Member). The second section, titled 'Relationships', lists external relationships: 'Dunder Mifflin' (Employer of Jim), 'Pam Beesly' (Partner of Jim), 'Dunder Mifflin' (Employer of Pam), 'Jim Halpert' (Partner of Pam), and 'Michael Bluth' (Friend of Pam). Each relationship entry includes a dropdown arrow on the right side.

Relationship	Role
Halpert/Beesly	Head of Household
Jim Halpert	Head of Household
Pam Beesly	Member
Dunder Mifflin	Employer of Jim
Pam Beesly	Partner of Jim
Dunder Mifflin	Employer of Pam
Jim Halpert	Partner of Pam
Michael Bluth	Friend of Pam

Creating a new Household

- Search for head of household
- On constituent's account, select Relationships
- Click on New Household to set up a new household for this constituent
- Fill out the New Household pop-up and click Save
- You will see a household symbol under the constituent's name with the new household name

1.



Bob Belcher
#377 margie.worrell+bob.belcher@bloomeran...
1ST TIME

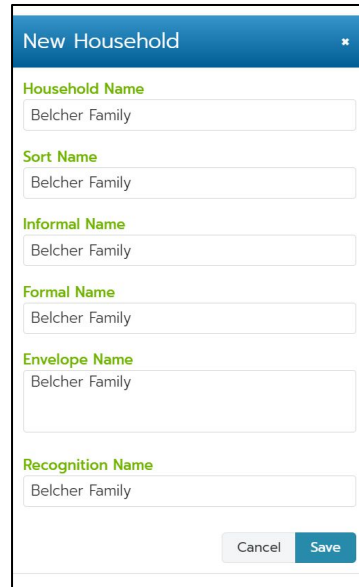
Summary Profile Timeline Relationships

Household
Bob Belcher is not in a Household

Join Household New Household

Relationships New Relationship

2.



New Household *

Household Name
Belcher Family

Sort Name
Belcher Family

Informal Name
Belcher Family

Formal Name
Belcher Family

Envelope Name
Belcher Family

Recognition Name
Belcher Family

Cancel Save

3.

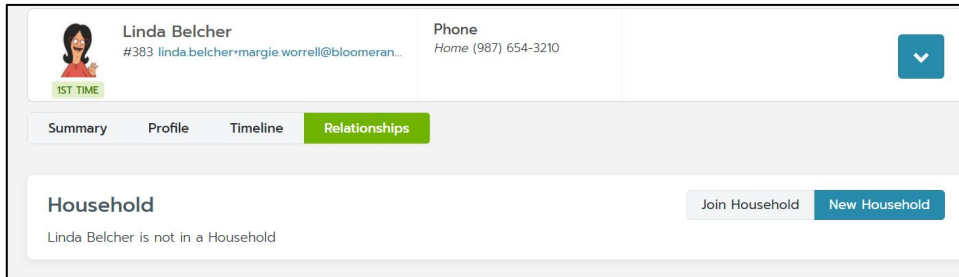


Bob Belcher
🏠 Belcher Family
#377 margie.worrell+bob.belcher@bloomeran...
1ST TIME

Adding a new Household member

- Search for member to add
- Click on Relationships tab
- Click on Join Household
- Search for the correct household

1.



Linda Belcher
#383 linda.belcher+margin.worrell@bloomerang...
Phone Home (987) 654-3210

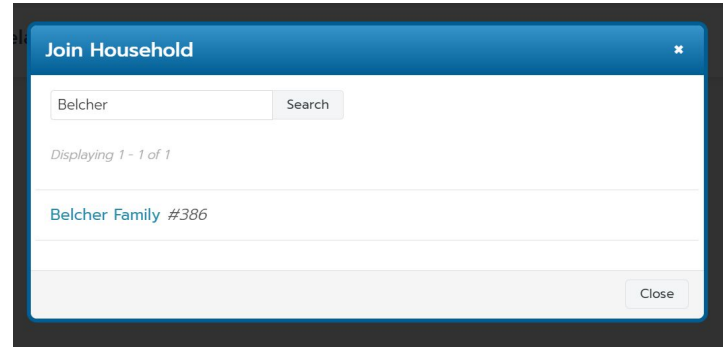
1ST TIME

Summary Profile Timeline Relationships

Household
Linda Belcher is not in a Household

Join Household New Household

2.



Join Household

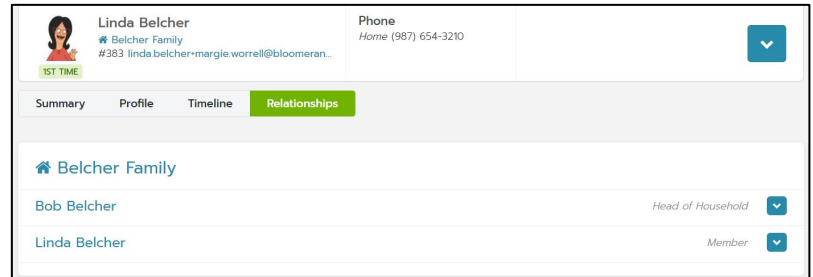
Belcher Search

Displaying 1 - 1 of 1

Belcher Family #386

Close

3.



Linda Belcher
Belcher Family
#383 linda.belcher+margin.worrell@bloomerang...
Phone Home (987) 654-3210

1ST TIME

Summary Profile Timeline Relationships

Belcher Family

Bob Belcher Head of Household


Linda Belcher Member

Head of the Household

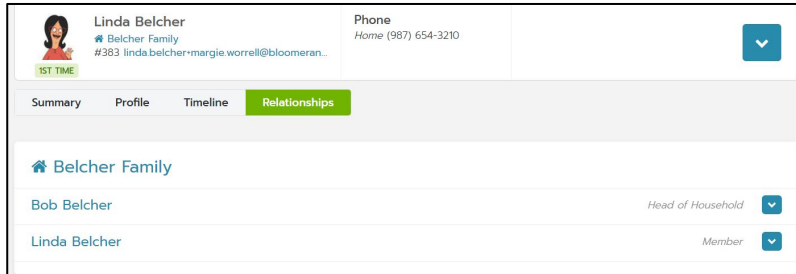
Simply means that this is the info to be used when communicating with all members.

- Use whoever has strongest relationship with your organization
- Another member's info may be used if BOTH are true;
 - Head of household is missing the piece of contact information
 - Household has only 2 members

Removing a Household member

- Open the constituent's account.
- Click the Relationships tab.
- In the household's section, click  next to the constituent's name.
- Click Leave Household.

1.



The screenshot shows the constituent account for Linda Belcher. The Relationships tab is selected. The household members list is visible, showing Bob Belcher as the Head of Household and Linda Belcher as a Member. A dropdown arrow is visible next to Linda Belcher's name.

Summary	Profile	Timeline	Relationships
Belcher Family			
Bob Belcher		Head of Household	▼
Linda Belcher		Member	▼

2.



The screenshot shows the dropdown menu for the household member. The 'Leave Household' option is highlighted, indicating the next step in the process.


Edit ✎

Make Head of Household 🔍

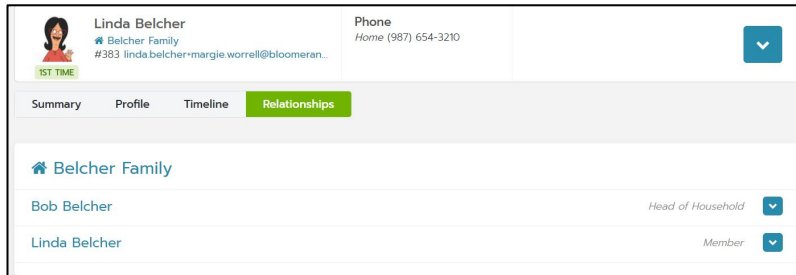
Leave Household ✕

Change Head of the Household

To change which constituent's contact information is used:

- Open the constituent's account.
- Click the Relationships tab.
- In the household's section, click  next to the constituent you want to use.
- Click Make Head of Household.

1.



The screenshot shows the constituent account page for Linda Belcher. At the top, there is a header with the constituent's name, address, and phone number. Below this is a navigation bar with tabs for Summary, Profile, Timeline, and Relationships. The Relationships tab is selected. Underneath, there is a section titled "Belcher Family" with a list of household members. The list includes "Bob Belcher" (Head of Household) and "Linda Belcher" (Member). Each name has a dropdown arrow next to it, indicating that the head of household can be changed.

2.

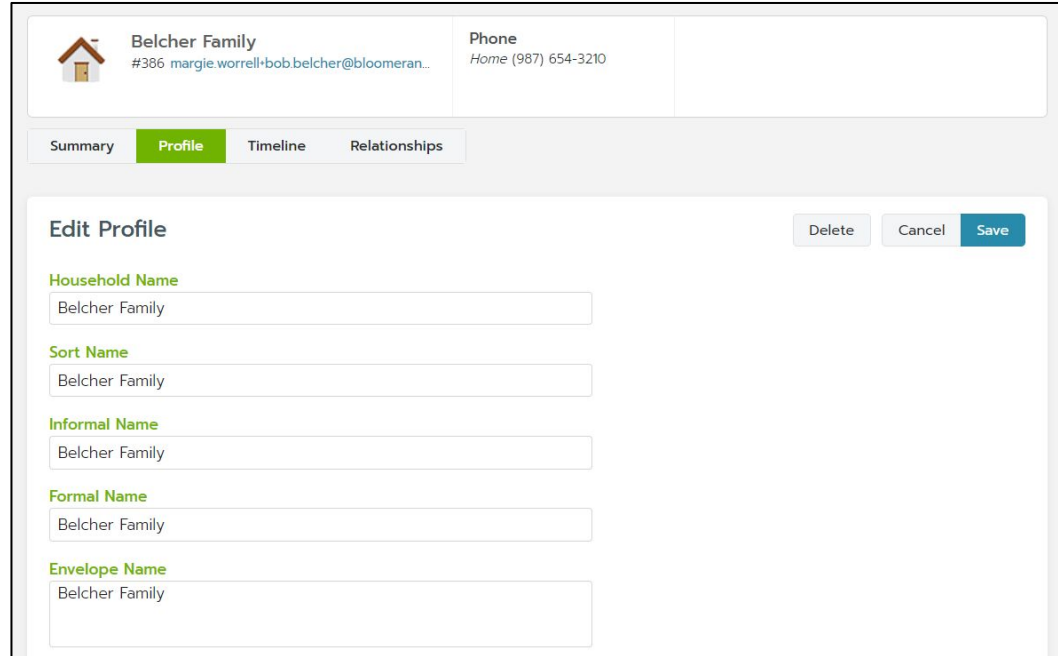


The screenshot shows a modal or dropdown menu with three options: "Edit" (with a pencil icon), "Make Head of Household" (with a key icon), and "Leave Household" (with an X icon). The "Make Head of Household" option is highlighted, indicating it is the selected action.

Edit Household Name Data

To change the household's name data, such as how an envelope is addressed:

- Search for and open the household account.
- Click the Profile tab.
- Click Edit.
- Make any changes and click Save.



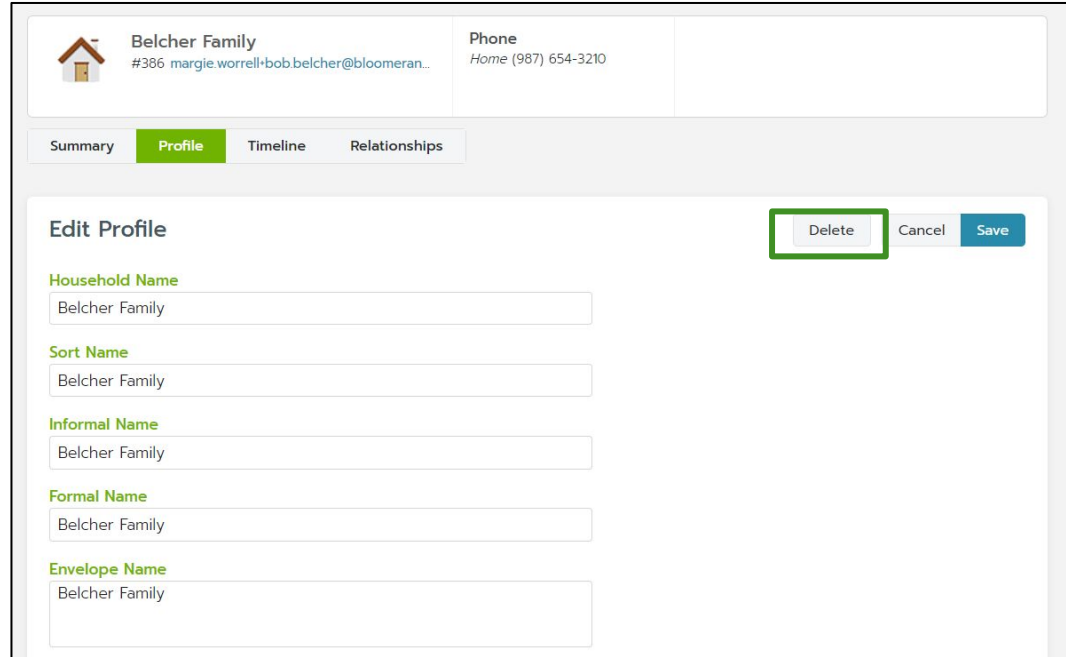
The screenshot displays the Bloomerang interface for editing household profile data. At the top, a header bar shows a house icon, the household name 'Belcher Family', an email address '#386 margie.worrell+bob.belcher@bloomeran...', and a phone number 'Home (987) 654-3210'. Below this is a navigation menu with tabs for 'Summary', 'Profile' (which is highlighted in green), 'Timeline', and 'Relationships'. The main content area is titled 'Edit Profile' and contains five text input fields, each with a label in green text: 'Household Name', 'Sort Name', 'Informal Name', 'Formal Name', and 'Envelope Name'. All fields currently contain the text 'Belcher Family'. In the top right corner of the form area, there are three buttons: 'Delete', 'Cancel', and 'Save' (which is highlighted in blue).

Delete a Household

Since households only aggregate the household members' data, you can delete a household without affecting the constituent accounts. To delete a household:

1. Search for and open the household account.
2. Click the Profile tab.
3. Click Edit.
4. Click Delete.

Removing all the household members from the household also deletes the household.



The screenshot shows the Bloomerang interface for a household named "Belcher Family". At the top, there is a header with a house icon, the household name "Belcher Family", a phone number "#386 margie.worrell•bob.belcher@bloomeran...", and a "Phone" field with the value "Home (987) 654-3210". Below the header is a navigation bar with tabs for "Summary", "Profile" (which is highlighted in green), "Timeline", and "Relationships". The main content area is titled "Edit Profile" and contains five text input fields, each with a green label and the text "Belcher Family": "Household Name", "Sort Name", "Informal Name", "Formal Name", and "Envelope Name". In the top right corner of the "Edit Profile" section, there are three buttons: "Delete" (highlighted with a green box), "Cancel", and "Save".

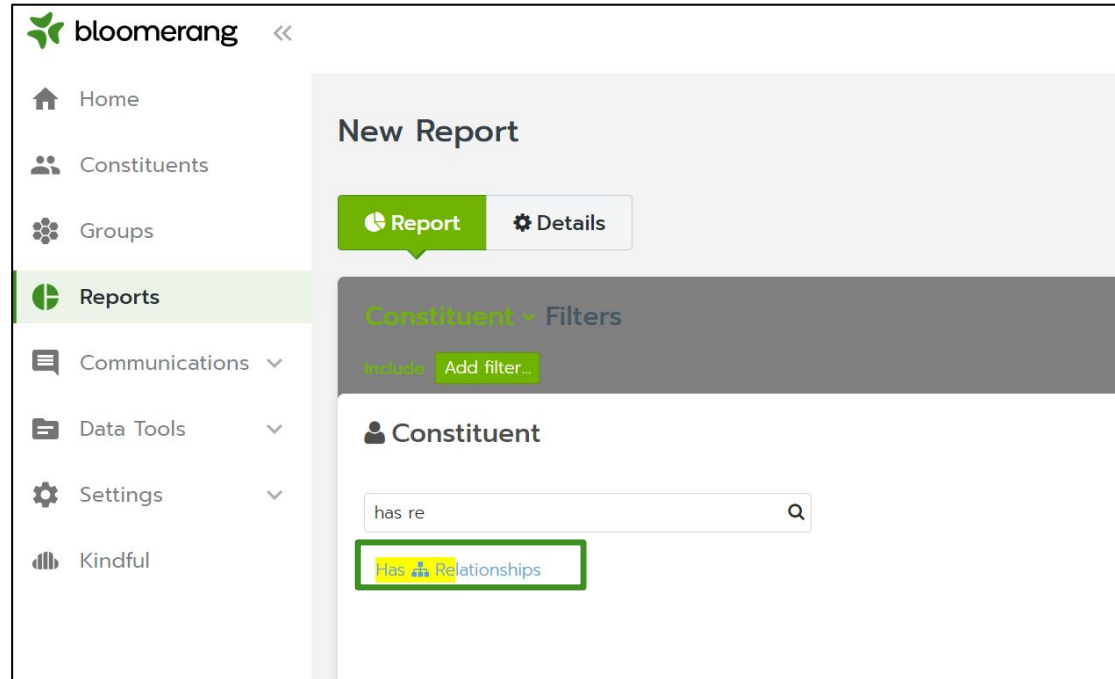
Reporting



Reporting on Relationships

Build a report about relationships to see how your constituents are connected. These reports can show you who can help you engage and cultivate a particular constituent. Of course, you can use these reports to send letters and emails.

Since relationships are all about people, relationship reports are based on constituents.

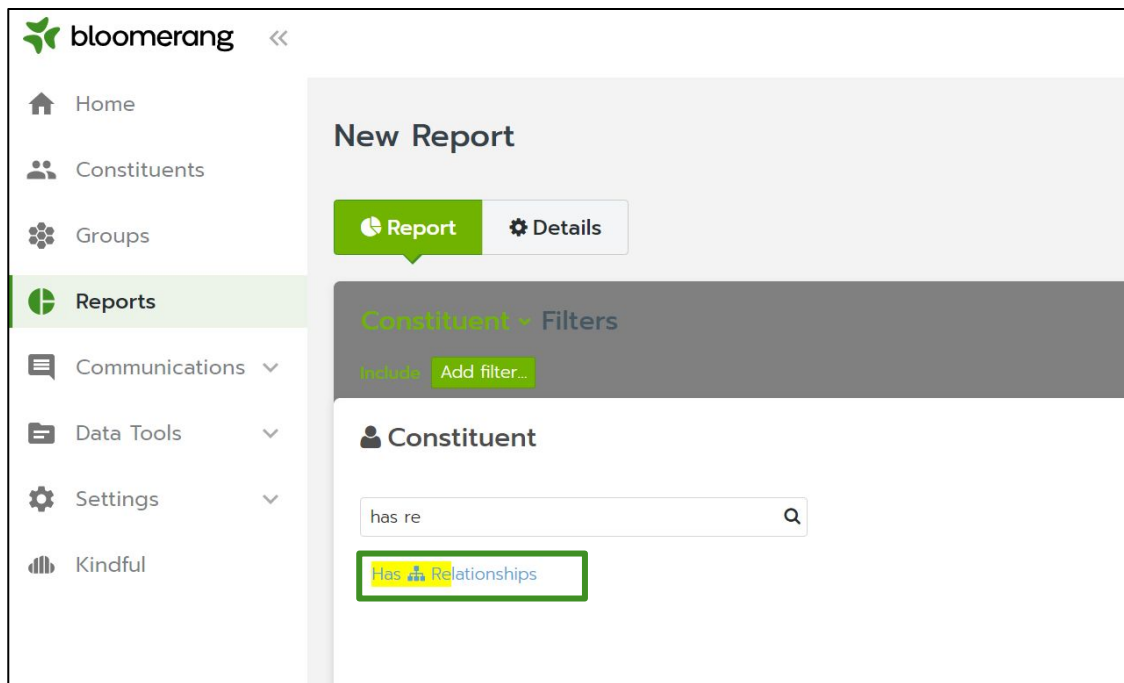


The screenshot shows the Bloomerang user interface for creating a new report. On the left is a navigation sidebar with the following items: Home, Constituents, Groups, Reports (highlighted in green), Communications, Data Tools, Settings, and Kindful. The main content area is titled 'New Report' and contains two buttons: 'Report' (highlighted in green) and 'Details'. Below these is a 'Constituent Filters' section with an 'include' label and an 'Add filter...' button. Underneath is a 'Constituent' section with a search input field containing the text 'has re' and a search icon. A button labeled 'Has Relationships' is highlighted with a green border.

Reporting on Households

You can run a report by Household or Constituent. When a report is run by Household:

- In a **constituent report**, household members are grouped together so that instead of listing each household member separately, their household is listed.
- In a **transaction, interaction, note, or task report**, Individuals who are in a household display the Household Name instead of the individual's names.
- ****Organizations and individuals not in a household are still listed.****

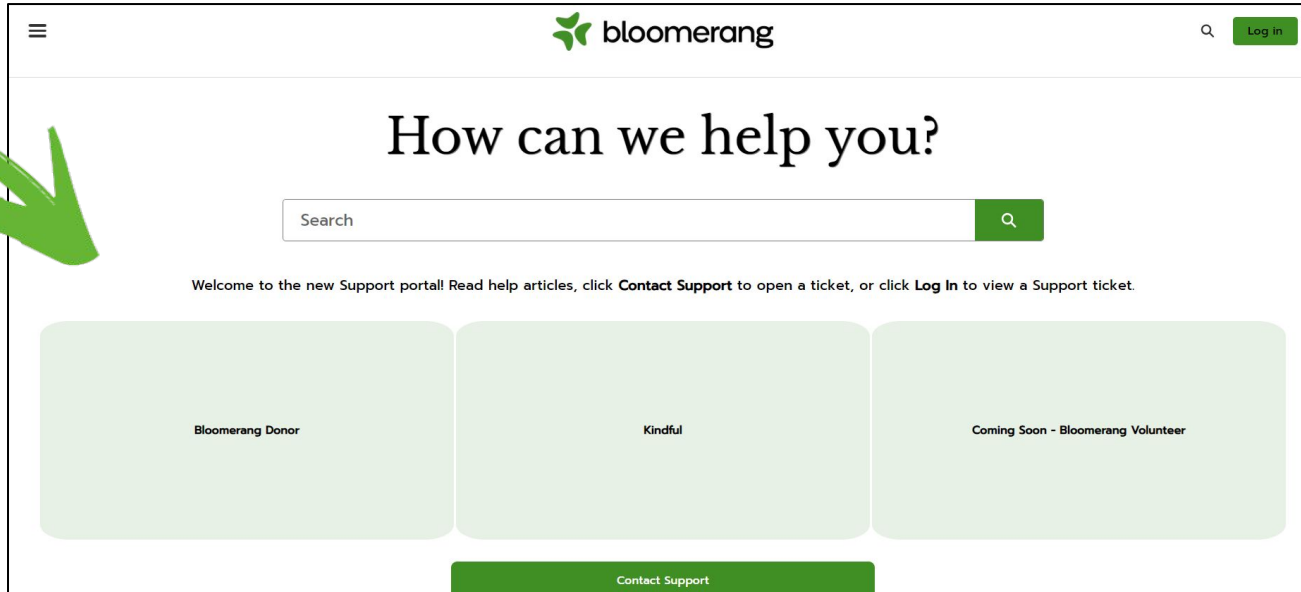
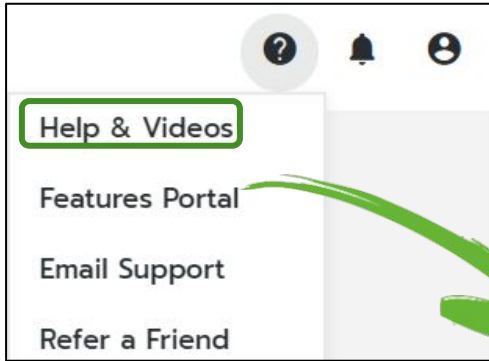










Note: Running a report by household doesn't mean the report only lists households. The results will include households, individuals not in households, and organizations.

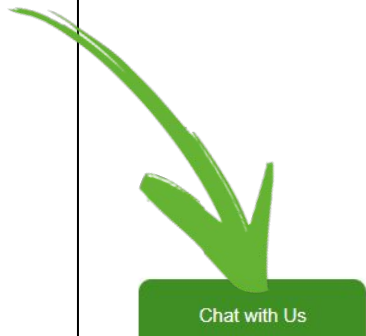
Into the database we go!

Resources

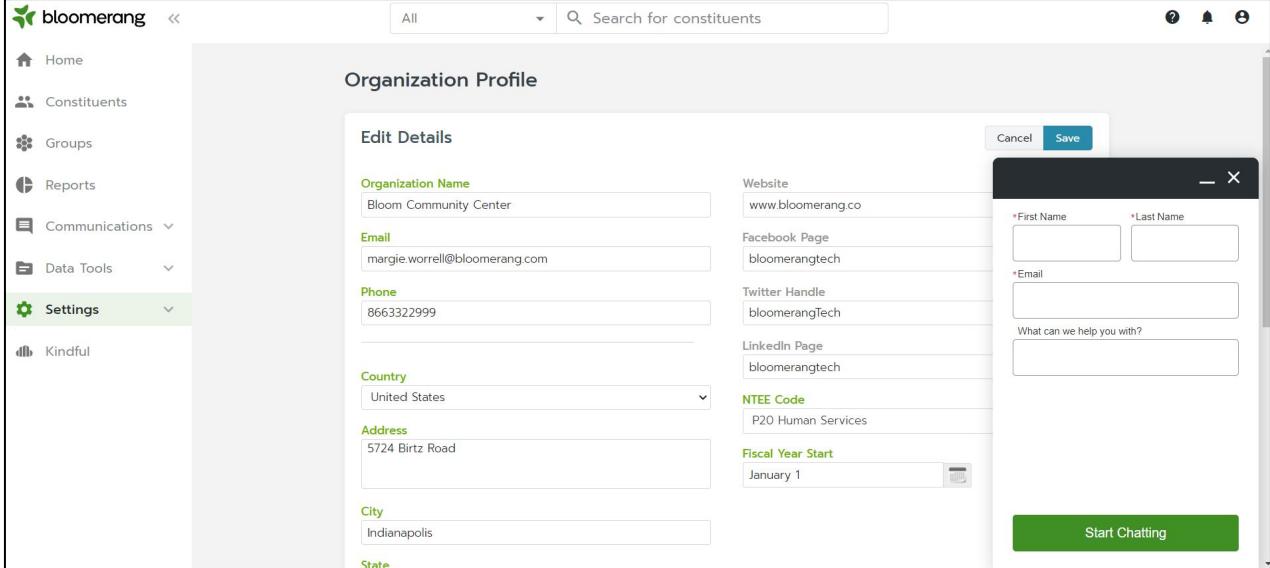
Bloomerang Knowledgebase and Support Portal



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



Live Chat has a new look and a new location!



The screenshot shows the Bloomerang interface with the 'Organization Profile' page open. The left sidebar is visible, and the 'Settings' menu item is highlighted. The main content area displays the 'Edit Details' form for an organization named 'Bloom Community Center'. The form includes fields for Organization Name, Email, Phone, Country, Address, City, State, Website, Facebook Page, Twitter Handle, LinkedIn Page, NTEE Code, and Fiscal Year Start. A 'Start Chatting' button is overlaid on the bottom right of the form, with a 'Cancel' and 'Save' button above it. A search bar at the top right of the main area contains the text 'Search for constituents'.

Resources

[Relationships and Households](#)

[How do I create a relationship role that is not listed?](#)

[How and Why Should I Create Households?](#)

[How do I add a donation to a household?](#)

[Report on Relationships](#)

[Run a Report by Household](#)

[How do I add a donation to a household?](#)

[How are the name fields auto-populated? - FAQ](#)




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 characteristic holes and vibrant green color, located in the bottom right corner of the slide.