



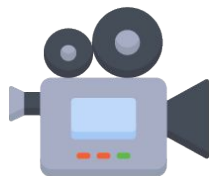
Donations and Pledges Part 1

Bloomerang Academy

Thank you for joining us today. We're glad you are here. Please tell us where you're joining from in the CHAT!



Housekeeping



We're recording this webinar! We'll send you a link to the recording and copy of the slides within 48 hours.

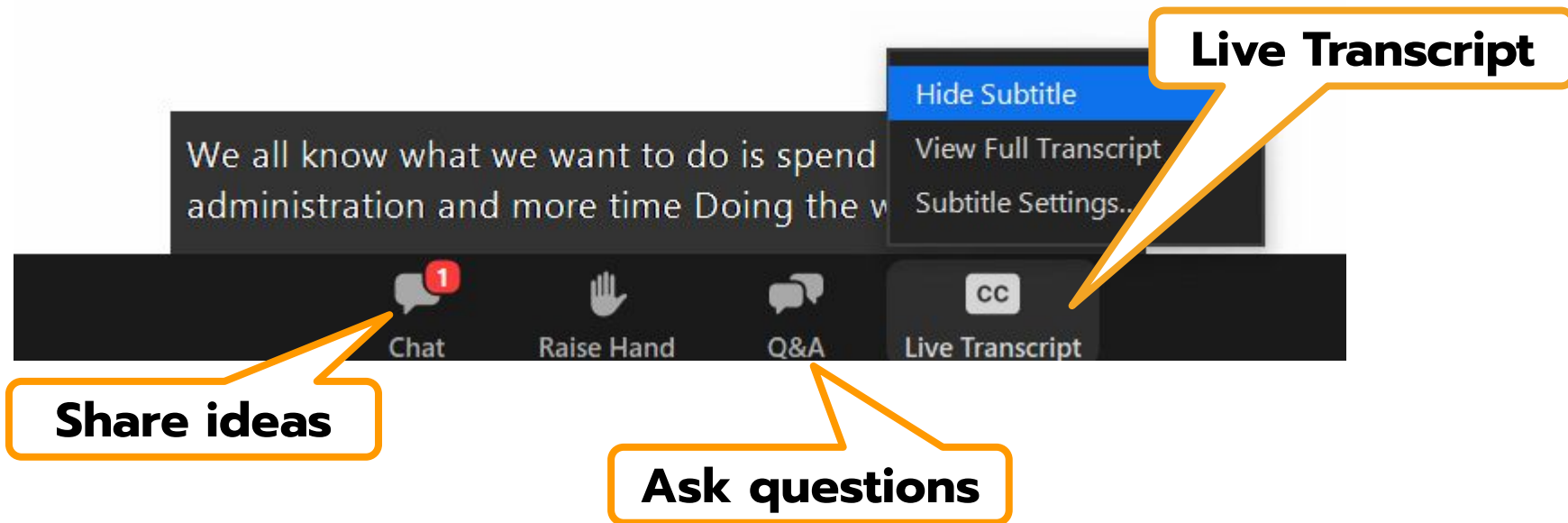


Feel free to ask questions! Use the Q&A option to ask questions and the chat option for general discussion. We'll answer questions at the end of the presentation.



Share your highlights and takeaways on your favorite social media channel and make sure to give us a follow!

Housekeeping



The image shows a video player interface with a dark background. At the top, there is a subtitle: "We all know what we want to do is spend administration and more time Doing the v". Below the subtitle is a control bar with four icons: a speech bubble with a red '1' (Chat), a hand (Raise Hand), two speech bubbles (Q&A), and a 'CC' icon (Live Transcript). A dropdown menu is open for the 'CC' icon, showing options: "Hide Subtitle", "View Full Transcript", and "Subtitle Settings..". Three orange callout boxes point to the interface: one to the Chat icon labeled "Share ideas", one to the Q&A icon labeled "Ask questions", and one to the Live Transcript icon labeled "Live Transcript".

Share ideas

Ask questions

Live Transcript

Our dial-in number in case you need it today: **+1 669 900 6833**

If you need more assistance, please reach out to support@bloomerang.com.

BLOOMERANG

Built for purpose

Giving platform designed to improve fundraising outcomes

Easy-to-use tech,
built for you

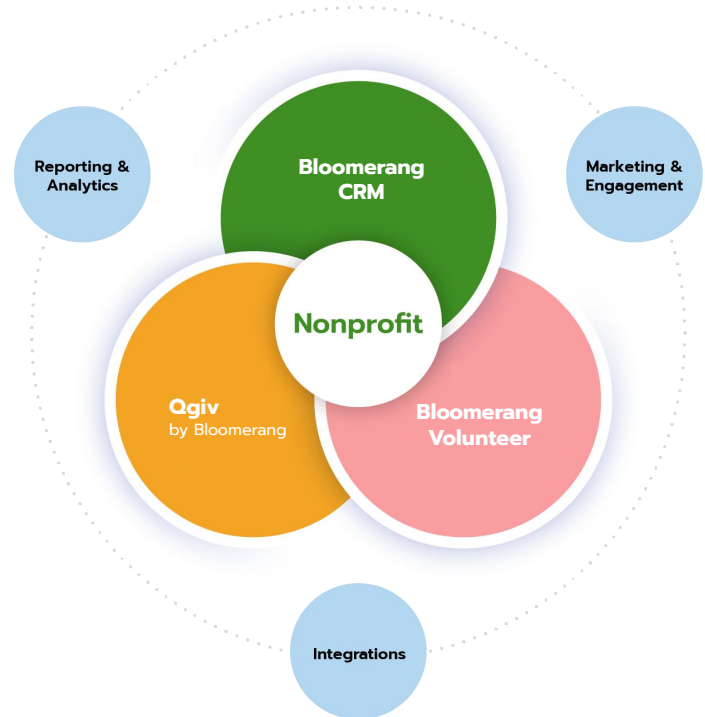
Industry leading
solutions

Insights that lead
to better results

Engagement that
inspires giving

Increase fundraising
revenue

Automate and simplify
day-to-day





VALUE

Raise more

Engagement quality increases, effort decreases, and giving soars!

30%

Higher overall donation page conversion rates.

\$108

Average recurring gift, 4x the industry average.

15%

Increase in donor base year-over-year.

\$180

Average one-time gift, 50% higher than the industry average.

25%

Increase in recurring donor conversion rate.

26%

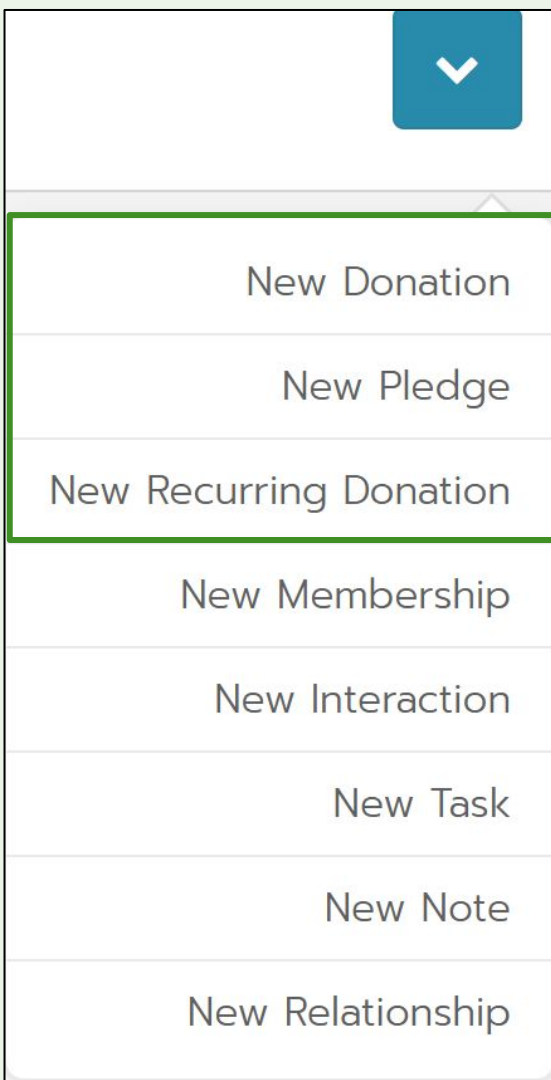
Increase in dollars raised year-over-year.

Donations and Pledges: What will we cover today?

- Terms
 - What is the difference between raised funds vs. revenue?
 - What is a donation vs. a recurring donation?
 - What's a pledge versus a pledge payment?
 - What is a soft credit and how is it used?
- Gift Entry–Setting it up
 - User Permissions
 - Custom fields
 - Payment Processor
 - Auto receipts
- Processes for adding and editing a donation
- Transaction Reporting Basics

Terms





Donation = one-time payment

Pledge = a promise to pay at some point in the future, either one-time or multiple payments

Recurring Donation = set up automatic payments on a schedule

*all donations and pledges are **raised funds until they are in hand**; **revenue** is dollars you have already received

Transaction Type	Raised	Revenue
Donation	✓	✓
Pledge	✓	
Pledge Payment		✓
Recurring Donation Schedule		
Recurring Donation Payment	✓	✓
Soft Credit/In-kind		

Handy chart:

Donations and Recurring Donation Payments can be either depending on where they are in the process.

A Pledge becomes a *Pledge Payment* once the donation is in hand. That is the moment it switches from Raised to Revenue.

A Recurring Donation Schedule is just the list of dates when the donation is to occur and is neither Raised nor Revenue.

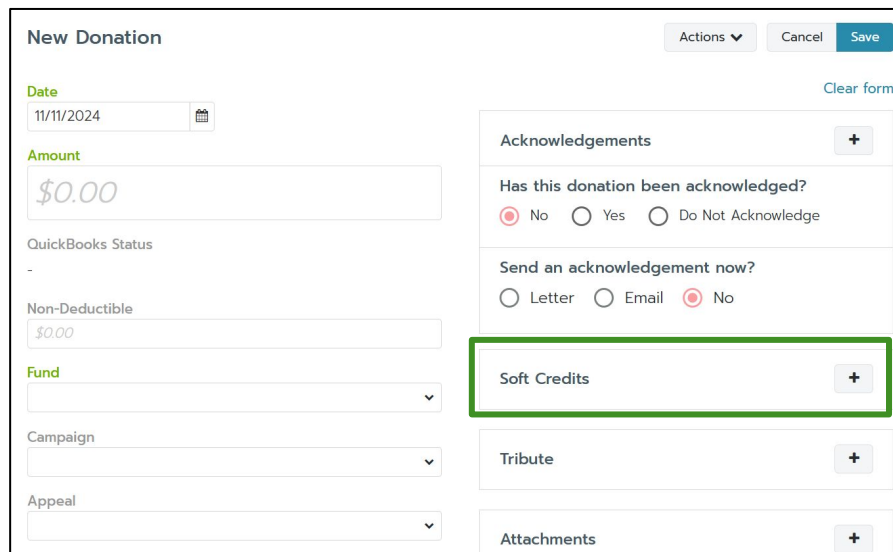
Soft Credit and In-kind will be examined on the next slide.

Soft Credit and In-kind

A different type of entry

Soft credits in Bloomerang are used to give a constituent credit for a donation, even though another constituent *actually* gave the money. For instance:

- When a donor's employer matches their gift
- When a donor recommends a grant from their Donor Advised Fund (DAF)
- When a donor gives through a third party (such as United Way, or family foundations)



New Donation Actions Cancel Save Clear form

Date
11/11/2024

Amount
\$0.00

QuickBooks Status
-

Non-Deductible
\$0.00

Fund
[Dropdown]

Campaign
[Dropdown]

Appeal
[Dropdown]

Acknowledgements +

Has this donation been acknowledged?
 No Yes Do Not Acknowledge

Send an acknowledgement now?
 Letter Email No

Soft Credits +

Tribute +

Attachments +

Soft credits and In-kind are not included in revenue or raised totals, nor do they appear in any of the dashboard metrics.

Soft Credit and In-kind

A different type of entry

Method

Select Payment Method

Saved Payment

Cash

Check

Credit Card

EFT


In Kind

Apple Pay


In-kind donations are gifts of goods or services. Some examples of in-kind gifts include:

- An IT company donates refurbished computers and peripherals to an organization (goods)
- An attorney provides her service to write a legal document (services)
- Businesses donate gift baskets to a silent auction (goods)

Soft credits and In-kind are not included in revenue or raised totals, nor do they appear in any of the dashboard metrics.

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

Gift Entry–Setting it up

A smaller portion of a Monstera leaf, showing the same green color and hole pattern, positioned in the bottom-right corner of the slide.

Edit Details

Actions ▾

Cancel

Save

Name

Board Member

Time Zone

(UTC-05:00) Indiana (East) ▾

Username

board.member

Phone

Email

margie.worrell+board@bloomerang.com

BCC Email Address

bcc145355868@bloomerang.me

Active?



Use this BCC email address to add emails to a constituent's timeline.

Permissions

Select the user type.

Admin User

Standard User

Select whether this user can view and edit transactions.

View and edit all View only View and edit only transactions created by this user No access

Select which areas this user can access.

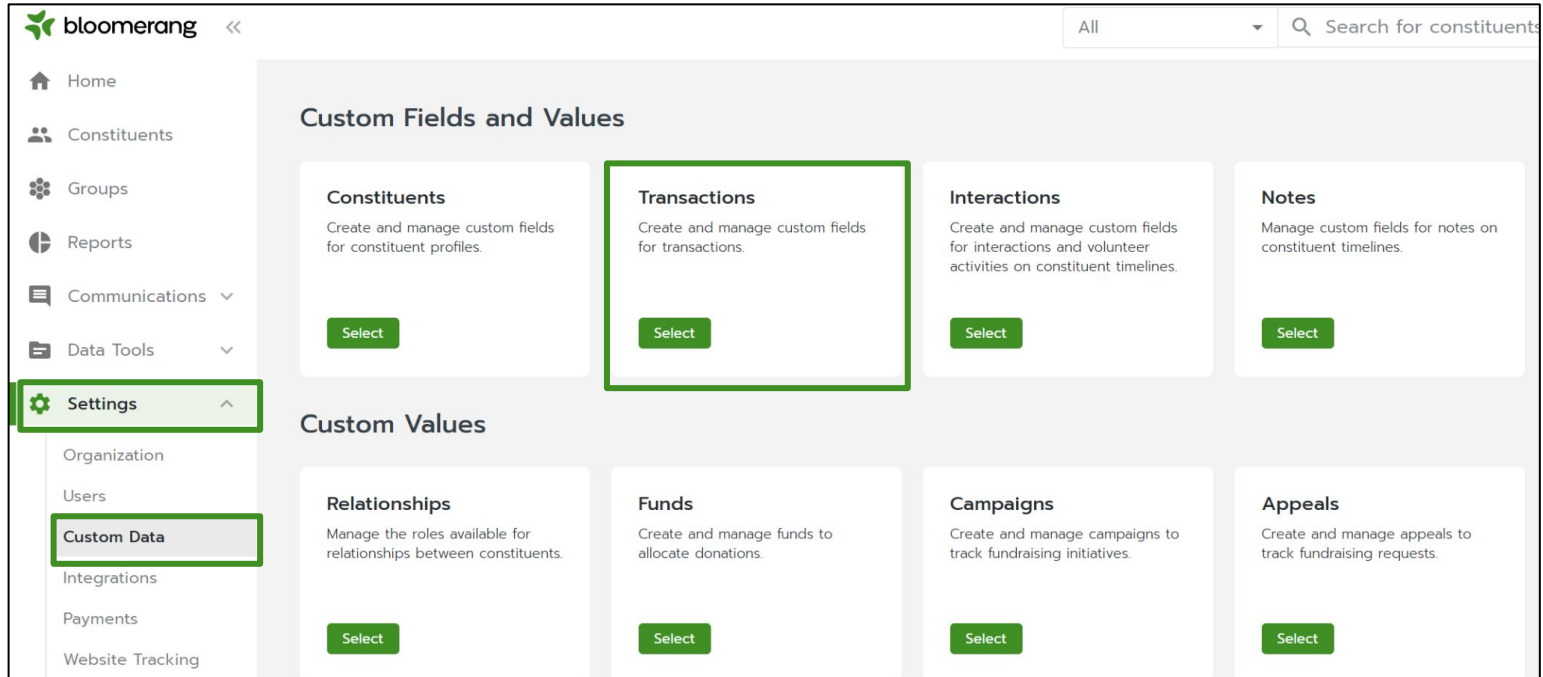
- Home
- Reports
- Data Tools
- Communications
 - Emails
 - Letters

Select which information this user can edit. Clear the checkbox to grant view-only permission.

- Constituents
- Reports

Who can enter gifts?

It is up to you! Your system administrator can set permissions which allow or do not allow access to transactions.



The screenshot shows the Bloomerang interface. On the left is a navigation sidebar with the following items: Home, Constituents, Groups, Reports, Communications, Data Tools, and Settings. The Settings item is highlighted with a green box. Under Settings, the following sub-items are listed: Organization, Users, Custom Data (highlighted with a green box), Integrations, Payments, and Website Tracking. The main content area is titled "Custom Fields and Values" and is divided into two sections: "Custom Fields and Values" and "Custom Values".

Custom Fields and Values

- Constituents**: Create and manage custom fields for constituent profiles. [Select](#)
- Transactions**: Create and manage custom fields for transactions. [Select](#)
- Interactions**: Create and manage custom fields for interactions and volunteer activities on constituent timelines. [Select](#)
- Notes**: Manage custom fields for notes on constituent timelines. [Select](#)

Custom Values

- Relationships**: Manage the roles available for relationships between constituents. [Select](#)
- Funds**: Create and manage funds to allocate donations. [Select](#)
- Campaigns**: Create and manage campaigns to track fundraising initiatives. [Select](#)
- Appeals**: Create and manage appeals to track fundraising requests. [Select](#)

Transaction Settings

You can create custom fields for your transaction entries or for use with Bloomerang Forms.

Custom Fields for Transactions New Category

Events	Custom	Edit	New Field
Registration Type	Pick One	Text	▼
Ticket Quantity	Freeform	Number	▼
Gala Transaction	Pick Multiple	Text	▼

Pledge info for form

Method	Custom	Edit	New Field
Method	Pick One	Text	▼
Pledge amount	Freeform	Currency	▼
Pledge frequency	Pick One	Text	▼

Make a Recurring Donation

Is this gift matched?	Custom	Edit	New Field
Is this gift matched?	Pick One	Text	▼
Employer Match?	Pick One	Text	▼
Recurring Donation Frequency	Pick One	Text	▼

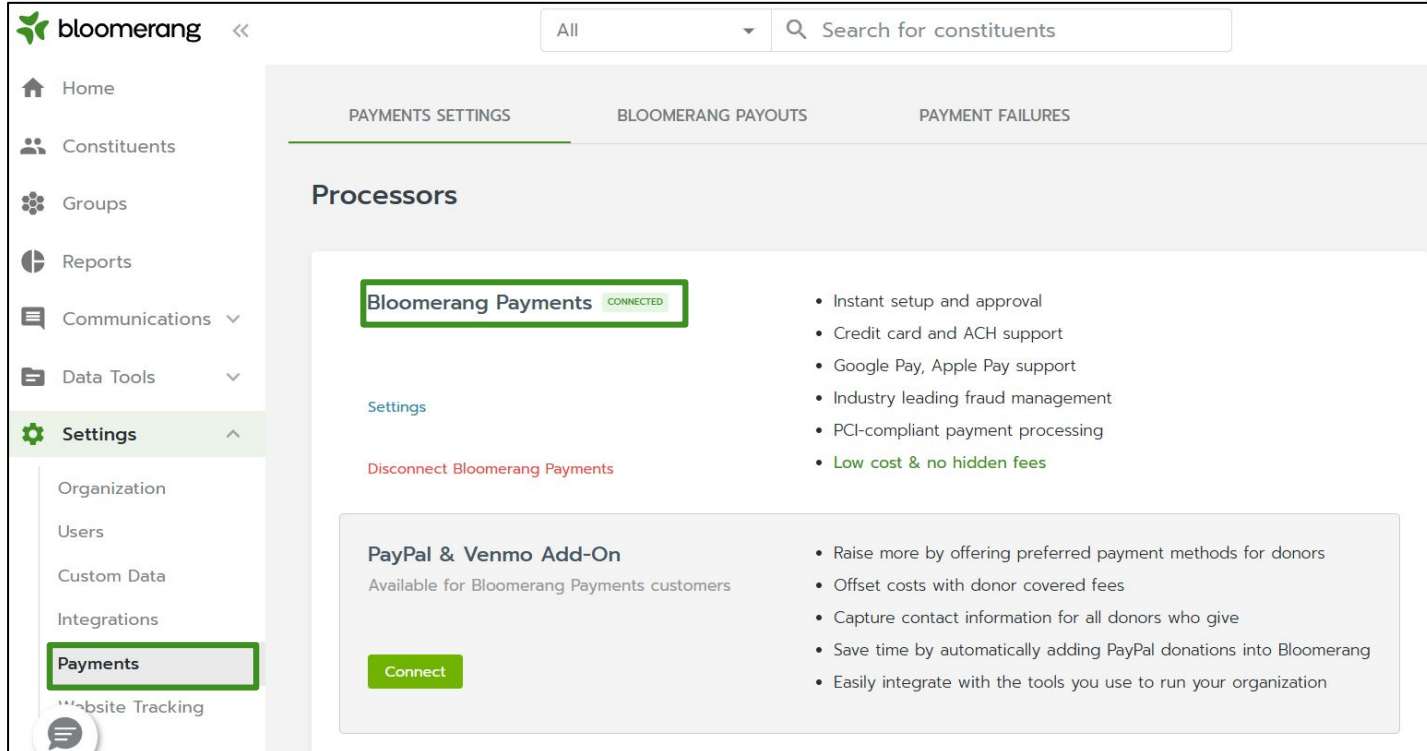
In Honor of

Tribute -- Name of Honoree	Custom	Edit	New Field
Tribute -- Name of Honoree	Freeform	Text	▼

Transaction Settings

Custom fields will depend on your use case.

How do you use custom fields for transactions currently?



The screenshot shows the Bloomerang web interface. On the left is a navigation sidebar with options: Home, Constituents, Groups, Reports, Communications, Data Tools, Settings (highlighted), Organization, Users, Custom Data, Integrations, Payments (highlighted), and Website Tracking. The main content area is titled 'Processors' and has three tabs: 'PAYMENTS SETTINGS' (selected), 'BLOOMERANG PAYOUTS', and 'PAYMENT FAILURES'. Under 'PAYMENTS SETTINGS', there is a card for 'Bloomerang Payments' with a 'CONNECTED' status. To its right is a list of features: Instant setup and approval, Credit card and ACH support, Google Pay, Apple Pay support, Industry leading fraud management, PCI-compliant payment processing, and Low cost & no hidden fees. Below this is a 'PayPal & Venmo Add-On' card, available for Bloomerang Payments customers, with a 'Connect' button and a list of benefits: Raise more by offering preferred payment methods for donors, Offset costs with donor covered fees, Capture contact information for all donors who give, Save time by automatically adding PayPal donations into Bloomerang, and Easily integrate with the tools you use to run your organization.

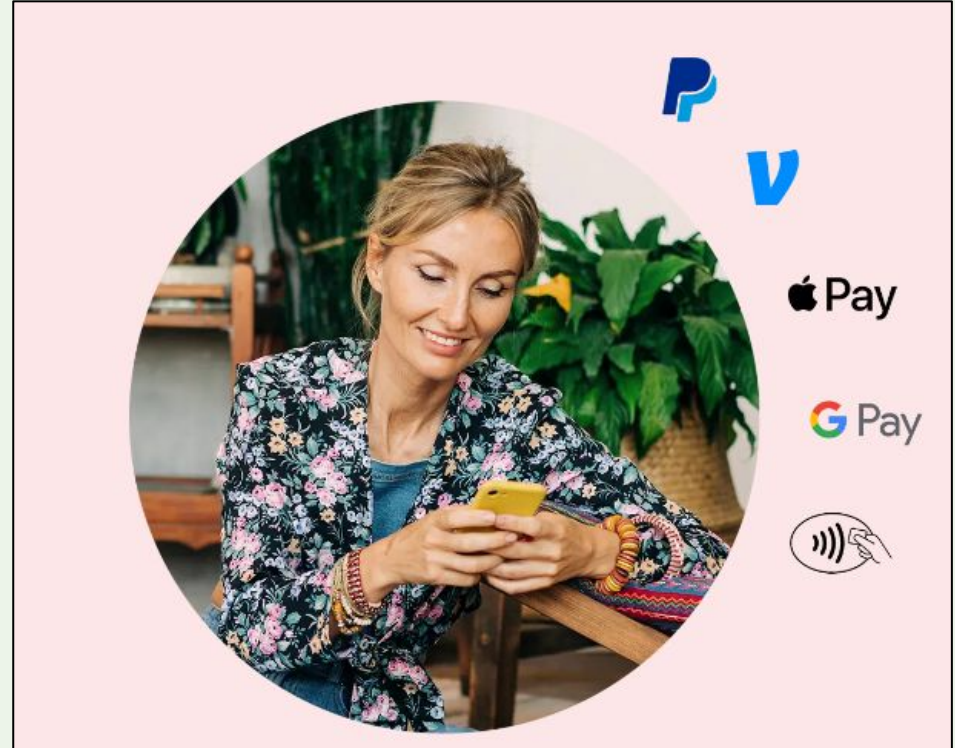
Transaction Settings

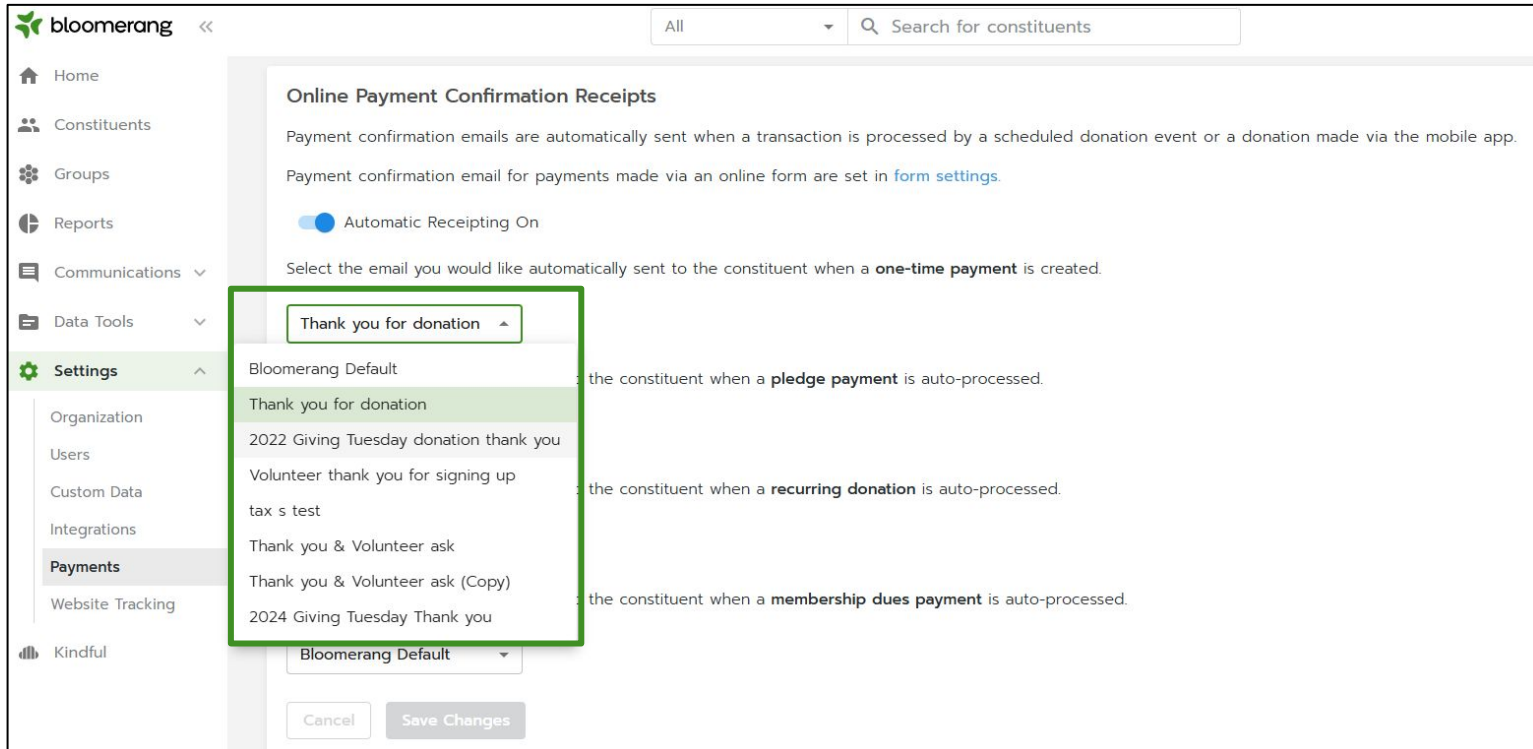
You need to set up payment processor if you would like to accept online payments. We recommend Bloomerang Payments for several reasons.

Not all Payment Processors Are the Same

Why Bloomerang Payments?

- Stop chasing down outdated cards
- Pay less on fees
- Feel confident in security
- Eliminate data entry
- Everything is linked together
 - Mobile app
 - Receipting
 - Acknowledgements
 - Reporting
- Award-winning support
- Offer digital wallet options to your donors
- Unlock Tap-to-pay for quick donation options





Online Payment Confirmation Receipts

Payment confirmation emails are automatically sent when a transaction is processed by a scheduled donation event or a donation made via the mobile app.

Payment confirmation email for payments made via an online form are set in [form settings](#).

Automatic Receipting On

Select the email you would like automatically sent to the constituent when a **one-time payment** is created.

- Thank you for donation
- Bloomerang Default
- Thank you for donation
- 2022 Giving Tuesday donation thank you
- Volunteer thank you for signing up
- tax s test
- Thank you & Volunteer ask
- Thank you & Volunteer ask (Copy)
- 2024 Giving Tuesday Thank you

Bloomerang Default

Cancel Save Changes

Transaction Settings

Set up your online payment confirmation receipts to save time. Use the default email or make your own transaction email and use that!

Funds

(only field of the three required in Bloomerang)

Funds are the big buckets of money

PRO TIP: Set up your funds to mimic your finance/accounting system. This makes record-keeping easier!

Money is going to that specific bucket.

This is usually going to be funding areas that span multiple years.

Examples:

- Unrestricted
- Program
- Scholarships

Campaigns

Campaigns are specific, overarching fundraising efforts

Campaigns are defined by the **financial goal and date range**. The date range could span an extended period of time depending on the type of campaign.

- Have a financial goal
- Have a specific date range
- Examples:
 - Annual Campaign
 - Capital Campaign
 - LARGE Events

Appeals

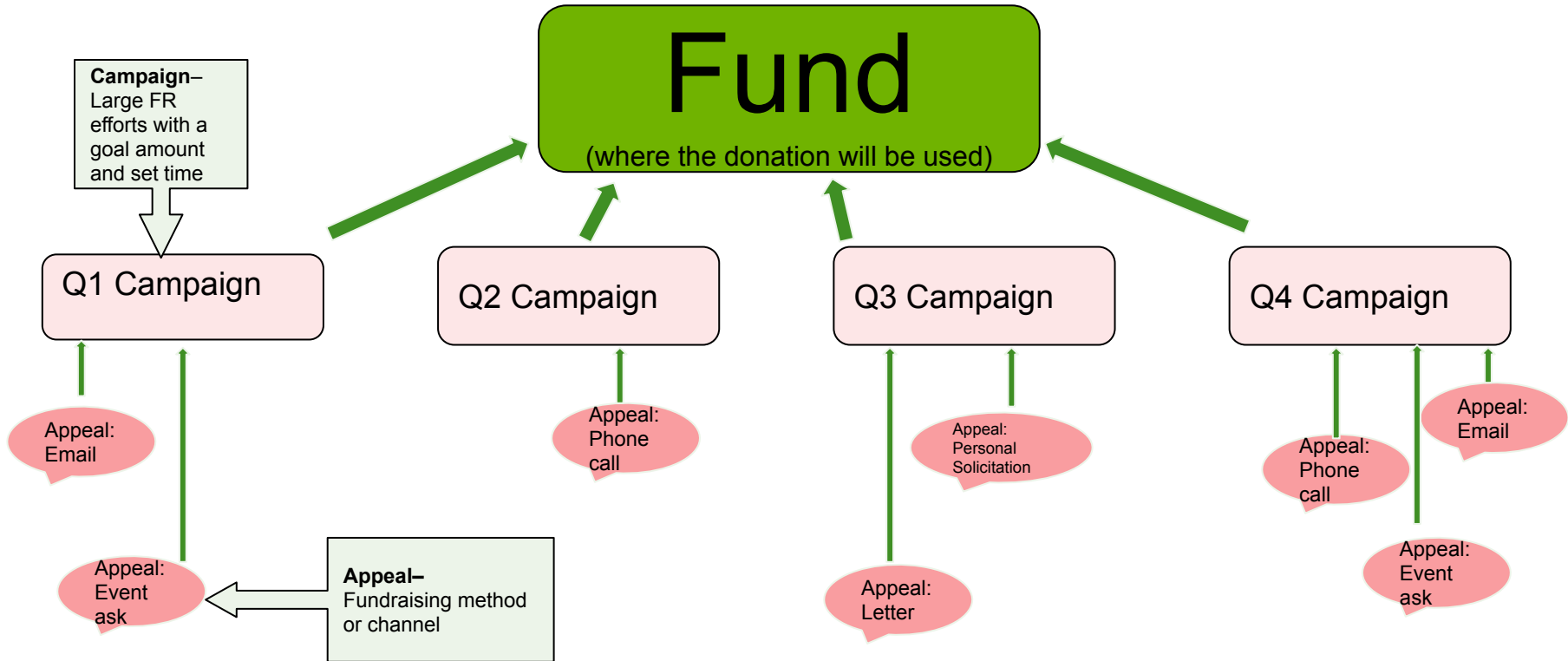
Appeals are a specific request for funds

WHY RECORD THIS? This info will help you see which types of funding requests have been most successful in the past.

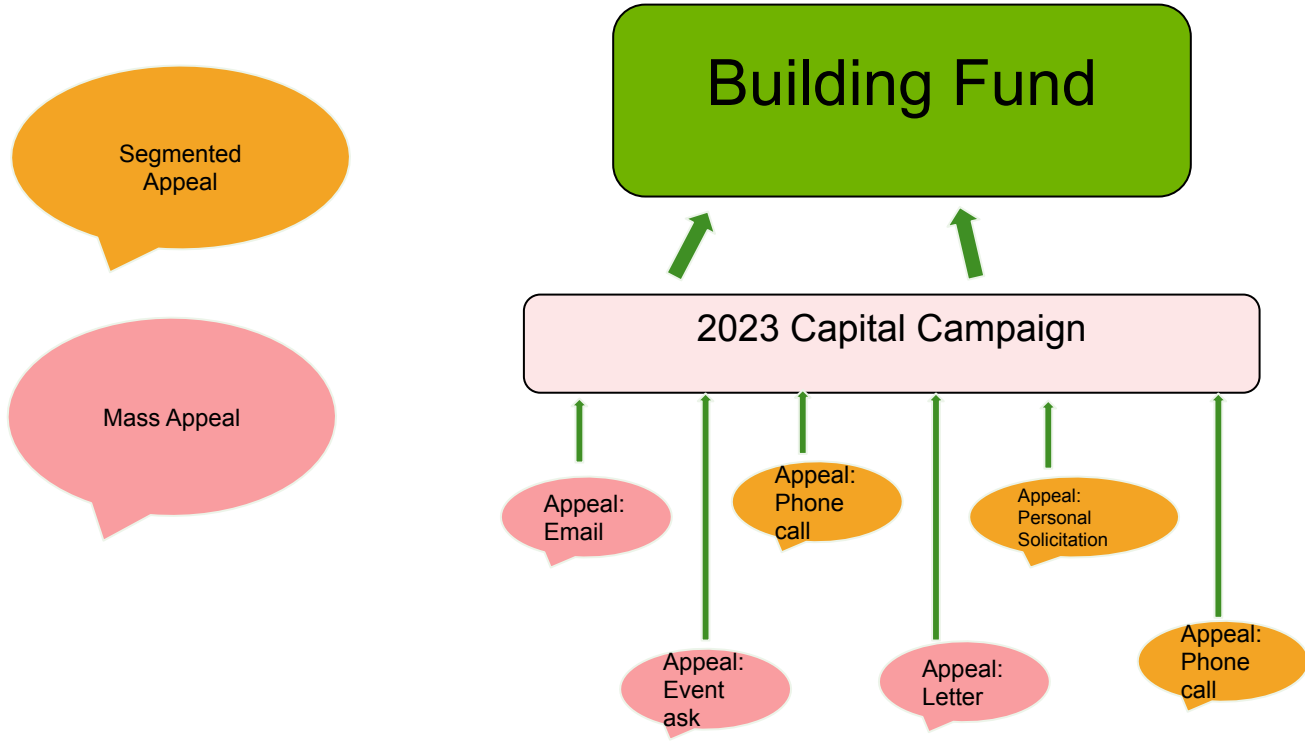
Examples:

- Spring Appeal
- Major Gift Ask
- Personal Solicitation
- Event Sponsorships

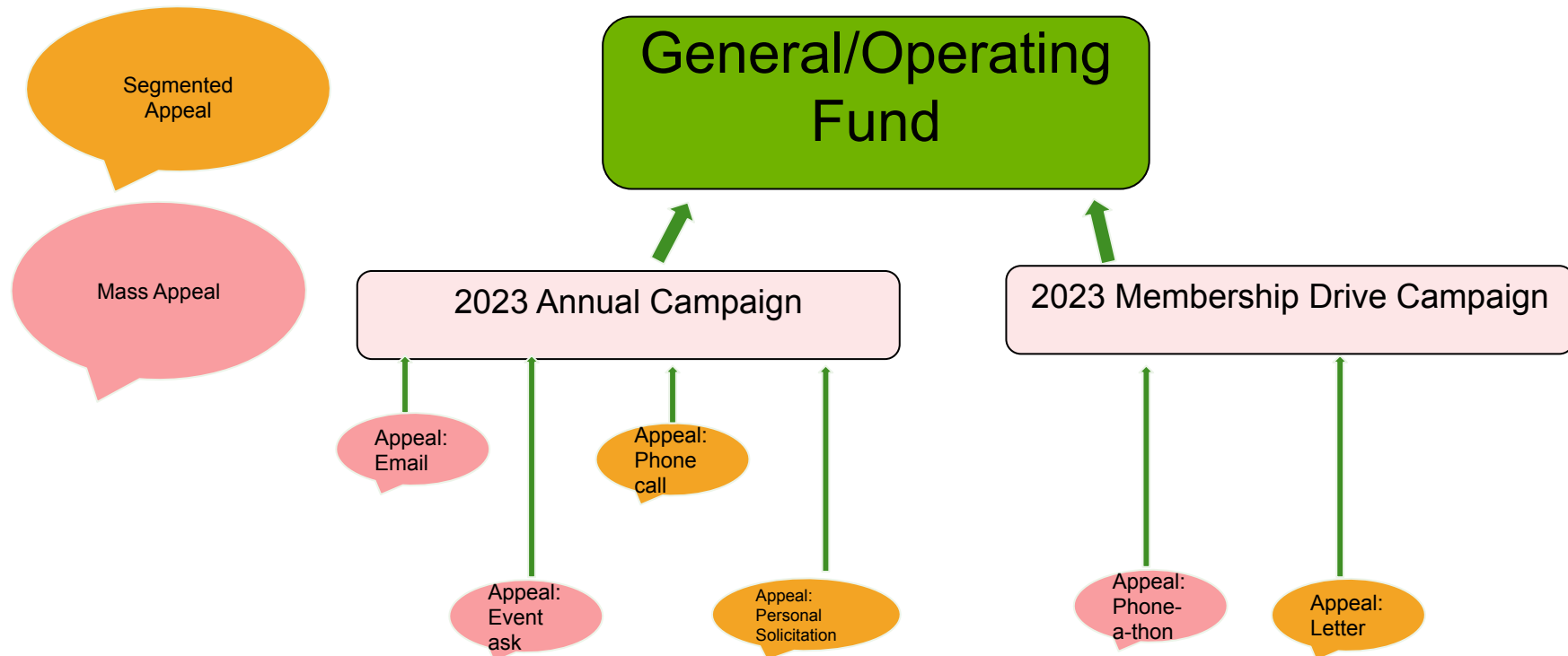
Visual of the typical relationship



Examples of this in action



Examples of this in action



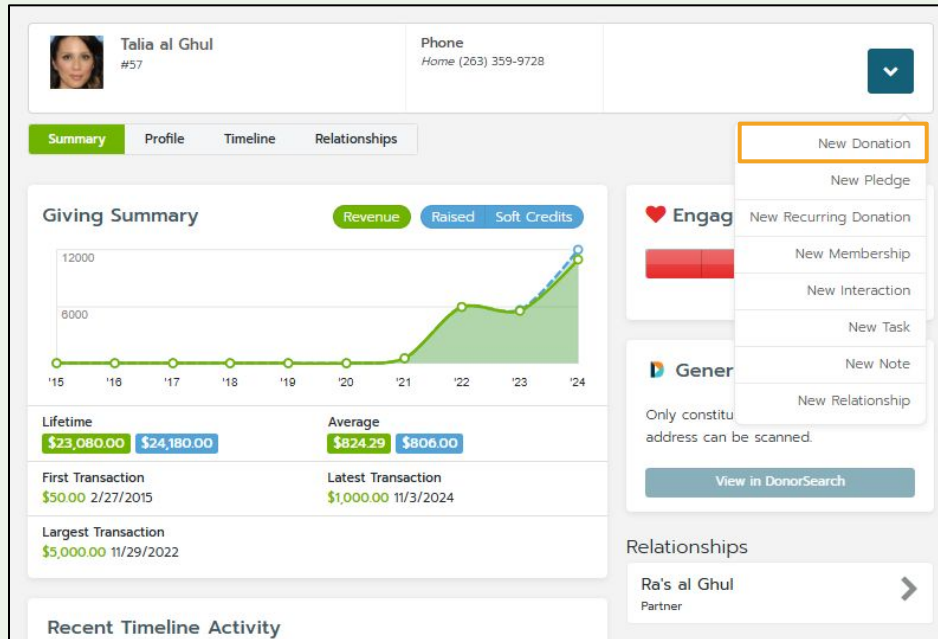
Large, vibrant green Monstera leaves with characteristic holes, positioned in the top-left corner of the slide.

Gift Entry–Entering gifts

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

Typical Donation Entry

Most of the time this is the process you will use for one-off donations.



Summary Profile Timeline Relationships

Engage

- New Donation
- New Pledge
- New Recurring Donation
- New Membership
- New Interaction
- New Task
- New Note
- New Relationship

Generators

Only constituent address can be scanned.

[View in DonorSearch](#)

Relationships

Ra's al Ghul
Partner

Giving Summary

Revenue Raised Soft Credits

Lifetime: \$23,080.00 \$24,180.00

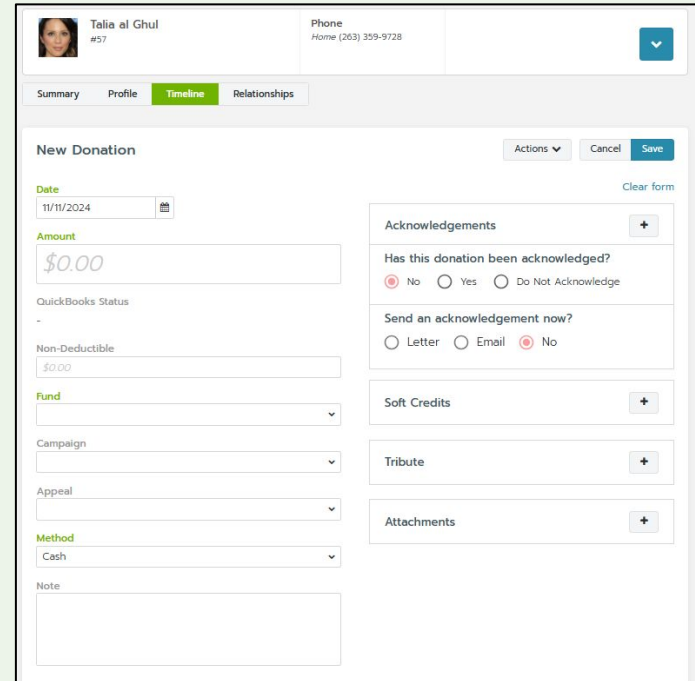
Average: \$824.29 \$806.00

First Transaction: \$50.00 2/27/2015

Latest Transaction: \$1,000.00 11/3/2024

Largest Transaction: \$5,000.00 11/29/2022

Recent Timeline Activity



Talia al Ghul #57 Phone Home (263) 359-9728

Summary Profile **Timeline** Relationships

New Donation Actions Cancel Save

Date: 11/11/2024

Amount: \$0.00

QuickBooks Status: -

Non-Deductible: \$0.00

Fund: [Dropdown]

Campaign: [Dropdown]

Appeal: [Dropdown]

Method: Cash

Note: [Text Area]

Acknowledgements

Has this donation been acknowledged?

No Yes Do Not Acknowledge

Send an acknowledgement now?

Letter Email No

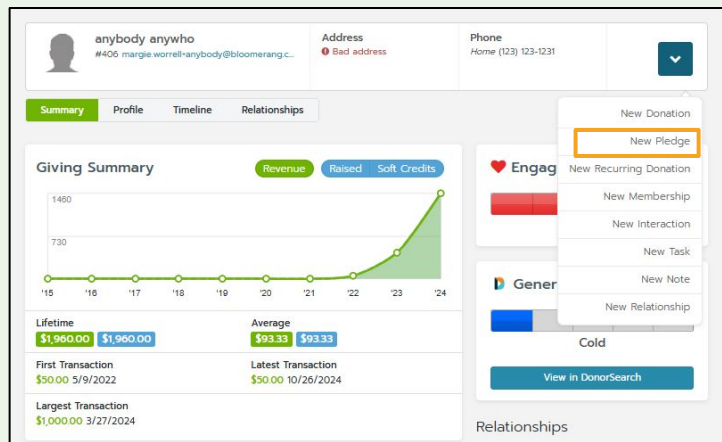
Soft Credits

Tribute

Attachments

Typical Pledge Entry

Most of the time this is the process you will use for setting up a pledge.



anybody anywho
#406 margie.worrell-anybody@bloomerang.c...

Address Bad address Phone Home (123) 123-1231

Summary Profile Timeline Relationships

Giving Summary Revenue Raised Soft Credits

1400
730

'15 '16 '17 '18 '19 '20 '21 '22 '23 '24

Lifetime **\$1,960.00** \$1,960.00 Average **\$93.33** \$93.33

First Transaction **\$50.00** 5/9/2022 Latest Transaction **\$50.00** 10/26/2024

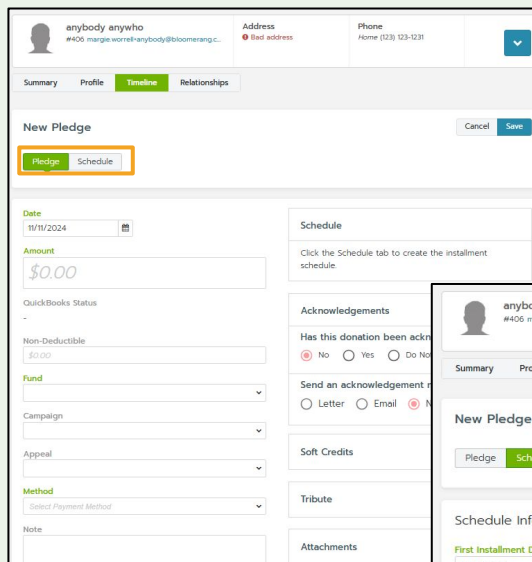
Largest Transaction **\$1,000.00** 3/27/2024

Engag New Donation
New Recurring Donation
New Membership
New Interaction
New Task
New Note
New Relationship

Gener Cold

View in DonorSearch

Relationships



anybody anywho
#406 margie.worrell-anybody@bloomerang.c... Address Bad address Phone Home (123) 123-1231

Summary Profile **Timeline** Relationships

New Pledge Cancel Save

Pledge Schedule

Date 11/11/2024

Amount \$0.00

QuickBooks Status -

Non-Deductible \$0.00

Fund

Campaign

Appeal

Method Select Payment Method

Note

Acknowledgements

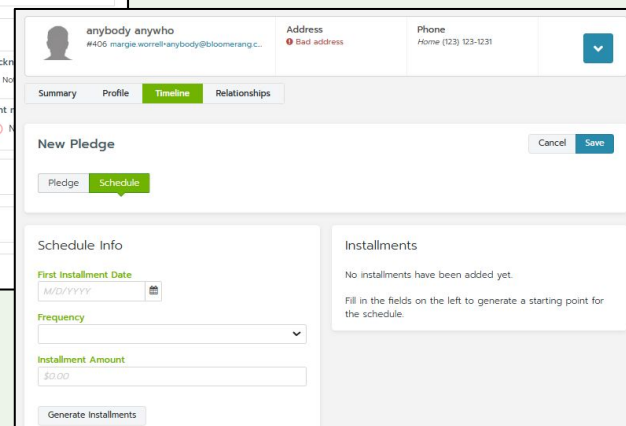
Has this donation been acknowledged? No Yes Do Not Know

Send an acknowledgement? Letter Email None

Soft Credits

Tribute

Attachments



anybody anywho
#406 margie.worrell-anybody@bloomerang.c... Address Bad address Phone Home (123) 123-1231

Summary Profile **Timeline** Relationships

New Pledge Cancel Save

Pledge Schedule

Schedule Info

First Installment Date M/D/YYYY

Frequency

Installment Amount \$0.00

Generate Installments

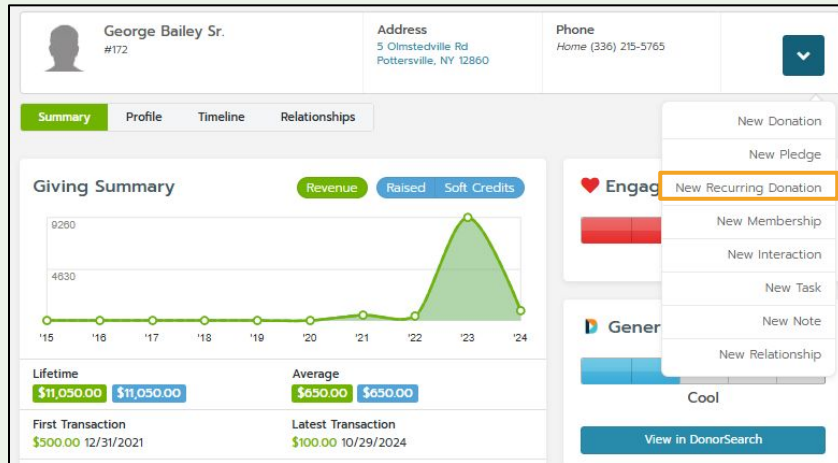
Installments

No installments have been added yet.

Fill in the fields on the left to generate a starting point for the schedule.

Typical Recurring Donation Entry

Most of the time this is the process you will use for setting up a recurring donation.



George Bailey Sr.
#172

Address
5 Olmstedville Rd
Pottersville, NY 12860

Phone
Home (336) 215-5765

Summary Profile **Timeline** Relationships

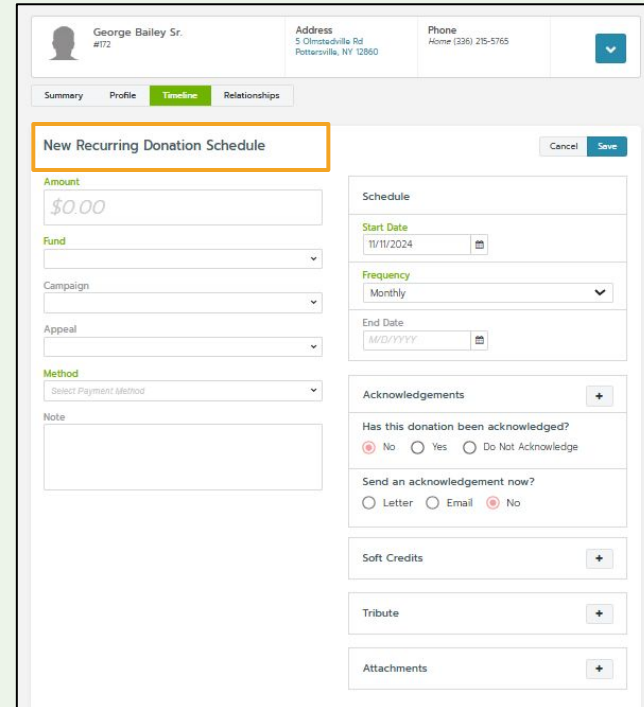
Giving Summary Revenue Raised Soft Credits

Lifetime: \$11,050.00 | Average: \$650.00

First Transaction: \$500.00 12/31/2021 | Latest Transaction: \$100.00 10/29/2024

Engagement: Cool

View in DonorSearch



George Bailey Sr.
#172

Address
5 Olmstedville Rd
Pottersville, NY 12860

Phone
Home (336) 215-5765

Summary Profile **Timeline** Relationships

New Recurring Donation Schedule Cancel Save

Amount
\$0.00

Fund

Campaign

Appeal

Method
Select Payment Method

Note

Schedule

Start Date
11/11/2024

Frequency
Monthly

End Date
MM/DD/YYYY

Acknowledgements +

Has this donation been acknowledged?
 No Yes Do Not Acknowledge

Send an acknowledgement now?
 Letter Email No


Soft Credits +

Tribute +

Attachments +

For Pledge & Recurring Donation Entry

Once you have a pledge/recurring schedule set, any donation you enter trigger this window.



Talia al Ghul
#57

Phone
Home (263) 359-9728

Summary Profile **Timeline** Relationships

Add a new donation or apply a payment to an existing pledge or recurring donation schedule.

Select One or More

Add a new donation

1/19/2024	Pledge Installment \$100.00 to Building Fund (\$1,000.00 in Arrears)
12/3/2024	Recurring Donation Installment \$1,000.00 to Building Fund

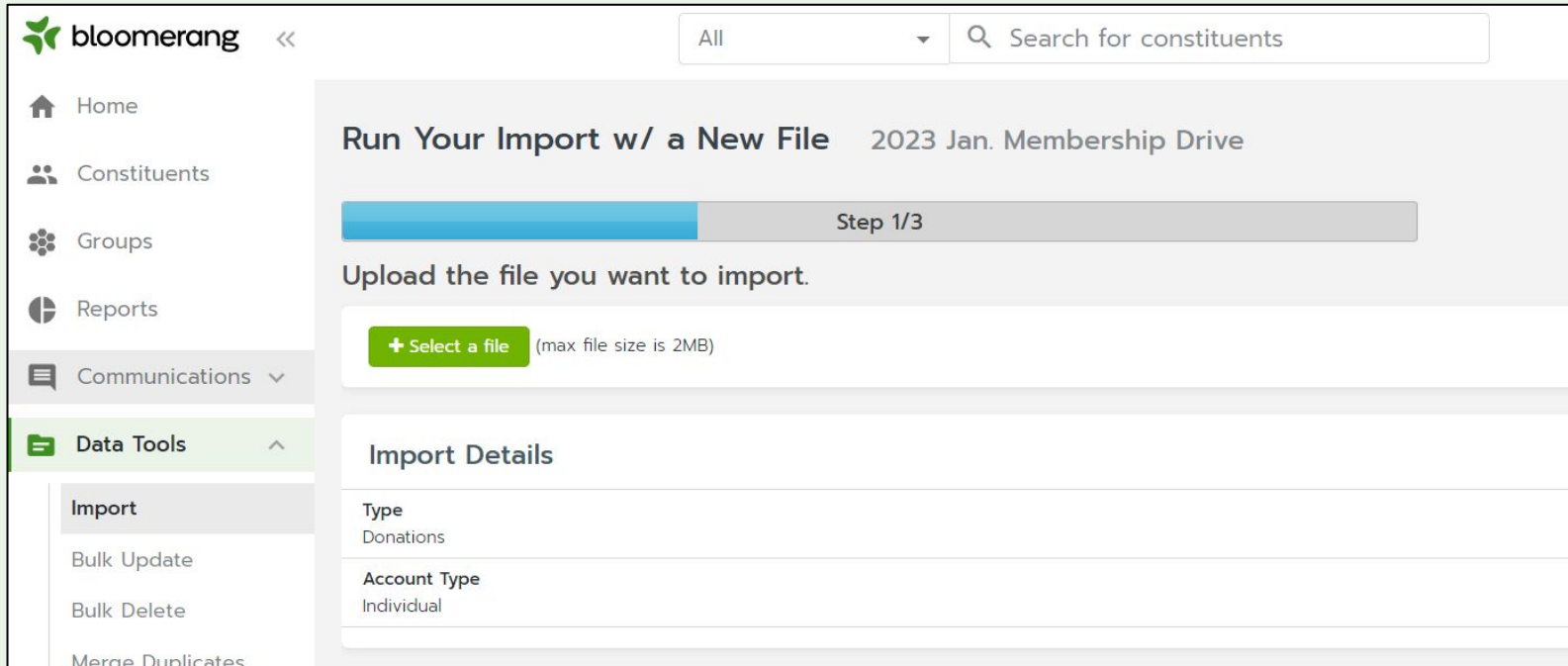
No thanks. I want to add it as a new donation

Click here to apply the donation to the pledge/recurring payment.

Click here to make this a one-off donation not connected to the pledge/recurring payment.

Typical Transaction Import

To import in bulk. Need first name, last name, date, amount and fund at the minimum.



The screenshot displays the Bloomerang web interface for a transaction import. On the left is a navigation sidebar with the following items: Home, Constituents, Groups, Reports, Communications (with a dropdown arrow), and Data Tools (with an upward arrow). Under 'Data Tools', the 'Import' option is selected, with sub-options for Bulk Update, Bulk Delete, and Merge Duplicates. The main content area at the top shows the Bloomerang logo, a search bar with the text 'Search for constituents', and a dropdown menu currently set to 'All'. Below this is a header for the import process: 'Run Your Import w/ a New File' followed by '2023 Jan. Membership Drive'. A progress bar indicates 'Step 1/3' is complete. The primary instruction is 'Upload the file you want to import.', accompanied by a green button labeled '+ Select a file' and a note '(max file size is 2MB)'. Below this is an 'Import Details' section with two rows: 'Type' set to 'Donations' and 'Account Type' set to 'Individual'.

Rapid Gift Entry

...the next donation will automatically fill in with the default fields (see next slide for details on fields).

George Weasley
The Weasleys #30

Address: The Burrow, Ottery St. Catchpole
Phone: Home (821) 802-2418

Summary Profile **Timeline** Relationships

New Donation Actions Cancel Save

Date: 8/8/2023
Amount: \$50.00
QuickBooks Status: Unsynced
Non-Deductible: \$0.00
Fund: Building Fund
Campaign:
Appeal:
Method: Credit Card
Processor:
Soft Credits: Anna Adams \$50.00
Tribute:
Acknowledgements:
Acknowledged?: No
Assign Letter:
 Generate letter on save
Email Receiving:
Clear form

When you click this after entering your donation info...

Fred Weasley
The Weasleys #29

Address: The Burrow, Ottery St. Catchpole
Phone: Work (698) 281-8209

Summary Profile **Timeline** Relationships

New Donation Defaults applied! Actions Cancel Save


Date: 8/8/2023
Amount: \$50.00
QuickBooks Status: Unsynced
Non-Deductible: \$0.00
Fund: Building Fund
Campaign:
Appeal:
Method: Credit Card
Processor:
Soft Credits: Anna Adams \$50.00
Tribute:
Acknowledgements:
Acknowledged?: No
Assign Letter:
 Generate letter on save
Email Receiving:
Clear form

Details on Rapid Gift Entry fields

Fill in the values that you'd like to store as default. The following donation fields may be stored as defaults:

- Date. If the date is left blank, it will default to the current date.
- Amount
- Non-Deductible
- Fund
- Campaign
- Appeal
- Method. Details on various payment methods (for example, Check Date) are not stored as defaults.
- Note
- Soft Credits
- Tribute
- Acknowledgements
- Custom Fields

Click Store as Default Values and then click Save.



New Donation Defaults applied!

Date: 8/10/2023

Amount

Soft Credits

Actions | Cancel | Save

Split Payment | Clear form

Remove Default Values

+

No longer want the default values? Just click Actions and Remove Default Values!

Unlinking a transaction from a payment processor

Allows you to make corrections to a payment that has already been processed.

Edit Donation

Actions

Date
6/1/2023

Amount
\$100.00

Non-Deductible
\$0.00

Fund
General/Operating

Campaign

Appeal

Soft Credits

Tribute

Acknowledgements

Acknowledged?
No

Assign Letter

Generate letter on save

Attachments

Credit Card Processed by Bloomerang Payments

Visa ending in 1111 exp. 11/2023 (Bloomerang Payments Processor)

Note

Enter a reason for unlinking the transaction.
Click **Unlink**.

Unlink from Processor?

Reason for unlinking transaction

Unlinking the processor cannot be undone. The transaction entry in your processor remains unchanged.





















Transaction Reporting

Transaction Report Basics

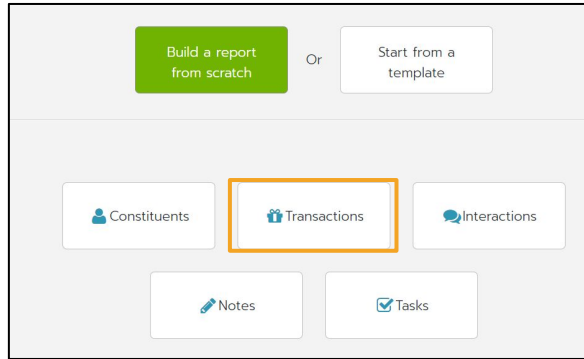


Anytime you create a report, you will select from building or using a template.

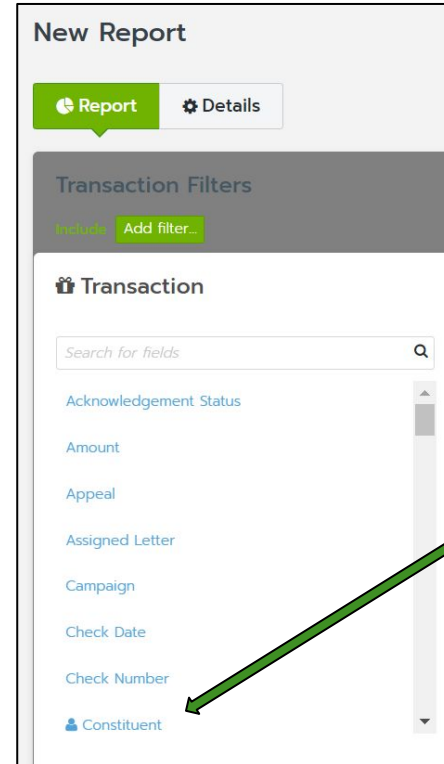
Many of the templates you see here could be a great starting point for transaction reports you would like to run.

 Loyal Donors Revenue from individual donors who have given every year from 2019 to 2023	 Top Donors Donors ranked by total revenue over the last 2 years	 Newest Donors First-time donors from the last 90 days
 Monthly Donors Donors with an active recurring gift schedule, or 12+ gifts in the last 365 days	 High Potential Donors Donors with both a high engagement score and a high generosity score	 Call List Template Default columns and filters to include in any call list. Just add your own criteria for who to call!
 LYBUNT Constituents who gave last fiscal year but not this fiscal year	 SYBUNT Constituents who gave some fiscal year but not this fiscal year	 Downgrades Constituents who gave less this fiscal year than last fiscal year
 Household Averages Average raised this fiscal year and last fiscal year by household	 Pledge Reminders Pledges with a payment due next month	 One-Time Donors Constituents who have only given once
 Pledge Details Outstanding pledges with pledge payments to date	 Online Donations Donations received from online forms	 Employer Relationships Employees grouped by their employer
 Projected Cash Flow Pledges and Recurring Donations with projected revenue this fiscal year	 Year-End Tax Report (Revenue) Prior-year revenue gifts from donors who gave at least \$250 total last year	 Year-End Tax Report (In Kind) All in kind gifts from the previous calendar year.

Transaction Report Basics



If you build from scratch, you will likely select a Transaction Report. This will give you access to the Transaction Filters.



You are still able to access Constituent Filters in this area as well. Create the filters that hone in on what you want to see.

Large, vibrant green Monstera leaves with characteristic holes are positioned in the top-left and bottom-left corners of the slide.

Let's go into Bloomerang!

A portion of a large, vibrant green Monstera leaf is visible in the bottom-right corner of the slide.

Thanks for joining!

More tools and resources to help you grow.

Connect with us!
support@bloomerang.com

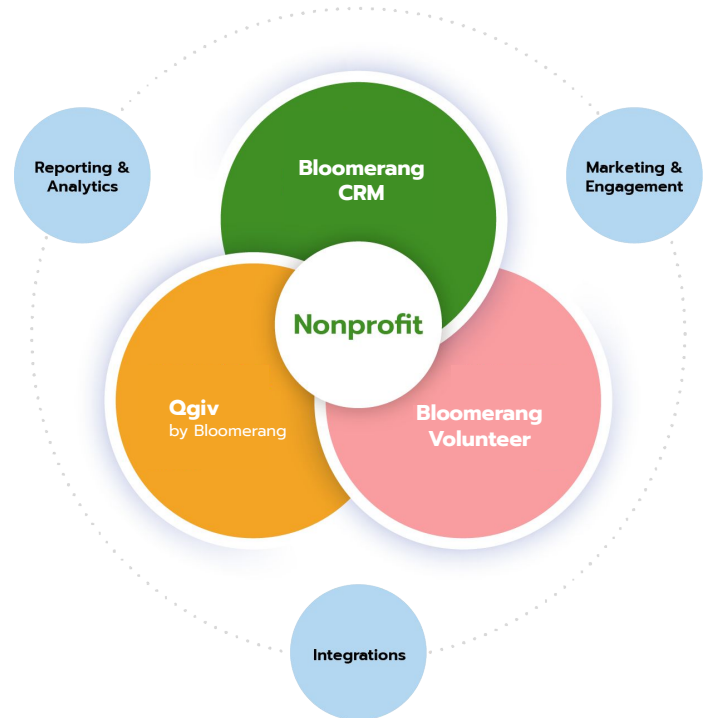
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We'd appreciate your feedback.

Fill out the post-session survey to let us know how we did.



Questions?





Thank you!

