


Welcome to Bloomerang Academy

Thank you for joining us!

Please drop into the chat and let us know where you are joining us from and what the weather is like where you are!



Housekeeping

Live Transcript

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

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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!

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.



Constituent Forms

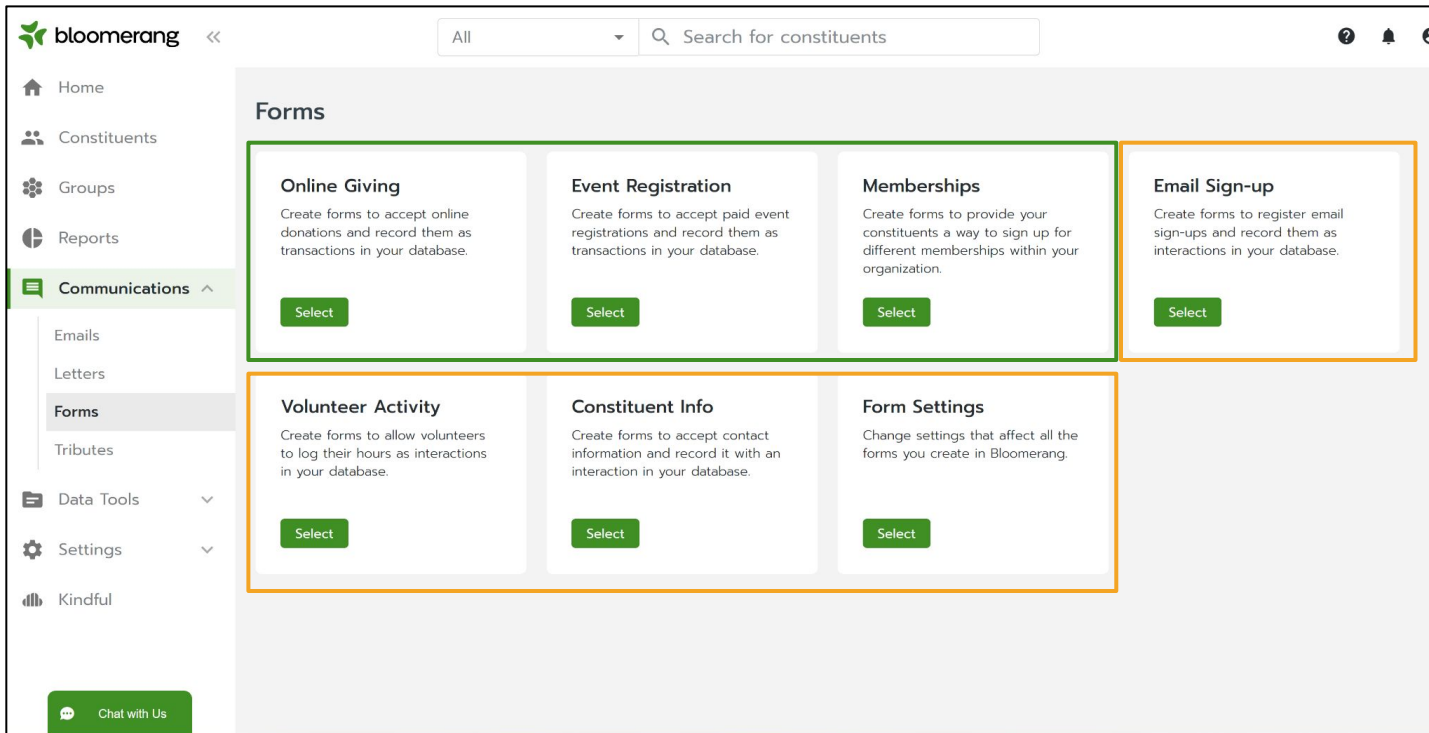


What will we cover today?



1. **The “Other” Bloomerang Forms – ones not connected with giving**
2. **Form Settings–quick overview**
3. **Why would I use a Constituent Form?**
4. **Design the form**
5. **Preview the form**
6. **Share the form**
7. **How to add a confirmation email to your form**

What forms does Bloomerang offer?



The screenshot shows the Bloomerang interface with a sidebar on the left containing navigation options: Home, Constituents, Groups, Reports, Communications (expanded), Emails, Letters, Forms (highlighted), Tributes, Data Tools, Settings, and Kindful. A 'Chat with Us' button is at the bottom left. The main content area is titled 'Forms' and features a search bar at the top with 'All' selected and a search input field. Below the search bar, there are six form options arranged in a 2x3 grid, each with a 'Select' button. The top row includes 'Online Giving', 'Event Registration', 'Memberships', and 'Email Sign-up'. The bottom row includes 'Volunteer Activity', 'Constituent Info', and 'Form Settings'. A green border highlights the 'Online Giving', 'Event Registration', and 'Memberships' cards, while an orange border highlights the 'Email Sign-up', 'Volunteer Activity', 'Constituent Info', and 'Form Settings' cards.

Online Giving, Event Registration and Membership are forms that are attached to transactions.

Email Sign-up, Volunteer Activity, Constituent Info and Form Settings are **not** attached to transactions.

Why use a Constituent Form?

**Share your
ideas in the
chat if you use
them!**

- Mass updating data in your database
- Volunteer sign-up for a specific event
- Free event registration
- Program sign ups
- Newsletter sign ups
- Other?

Form Settings

Completely Automated Public Turing Test to Tell Computers and Humans Apart



Form Settings

Fraud Prevention

CAPTCHAs reduce fraud by proving the user is human, rather than a computer. They are automatically included in Bloomerang-hosted forms. To enable CAPTCHAs for other forms, you must sign up for Google reCAPTCHA and type your keys below.

Use CAPTCHA for transaction forms?

Use CAPTCHA for interaction forms?

Site Key

Secret Key

You can limit all online giving and event registration forms from a single Internet connection (external IP address). We recommend turning on IP rate limiting. Only turn it off if you expect multiple transactions from the same location, like a school or office, within a 24-hour period.

Rate Limit Transaction Forms?

[Increase Form Security with reCAPTCHA](#)

Form Settings

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.

Note: Bloomerang only hosts standard forms.



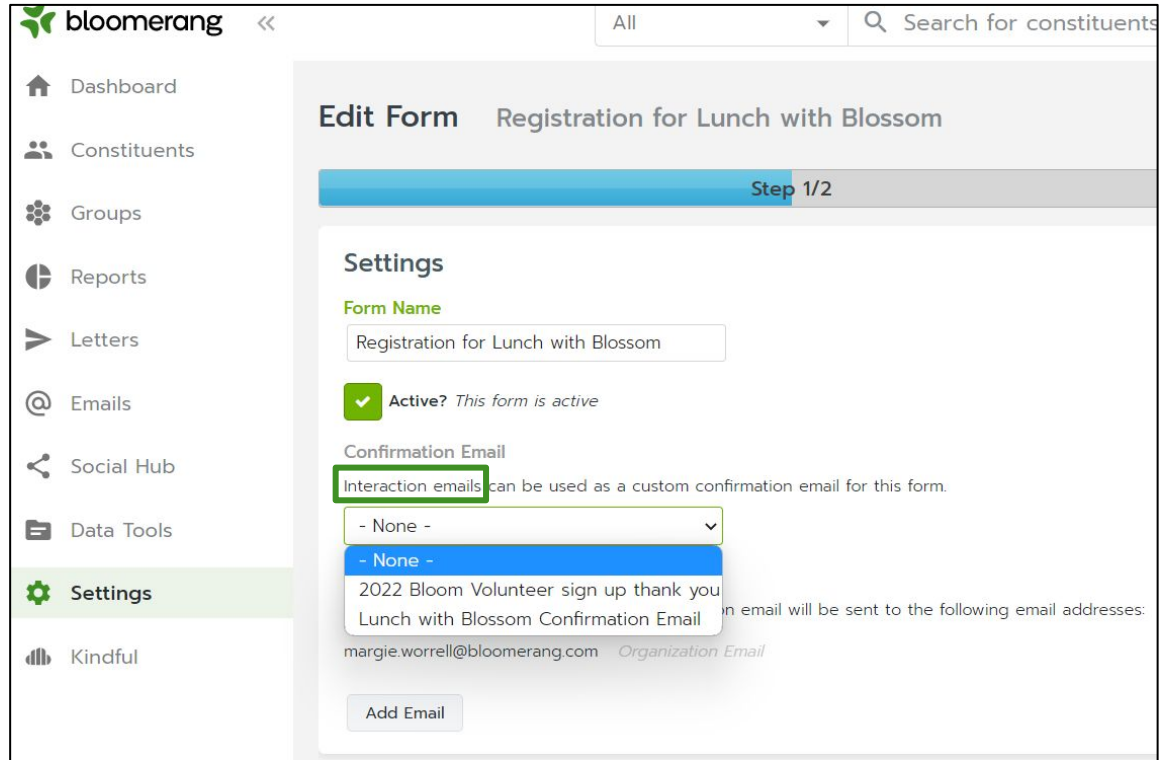
How to design a Constituent Form

**Very much the same
as the Email Sign Up
and Volunteer
Activity Forms**

1. Click Constituent Information Form
2. Click **NEW** or click on the blue drop down of an existing form to copy that form
3. Fill out the form
 - a. Settings
 - b. Subject and Purpose
 - c. Custom Fields
4. Design the Success Page
 - a. Create in Bloomerang
 - b. Redirect to your own page via URL
5. Preview your form
6. Share your form—publish

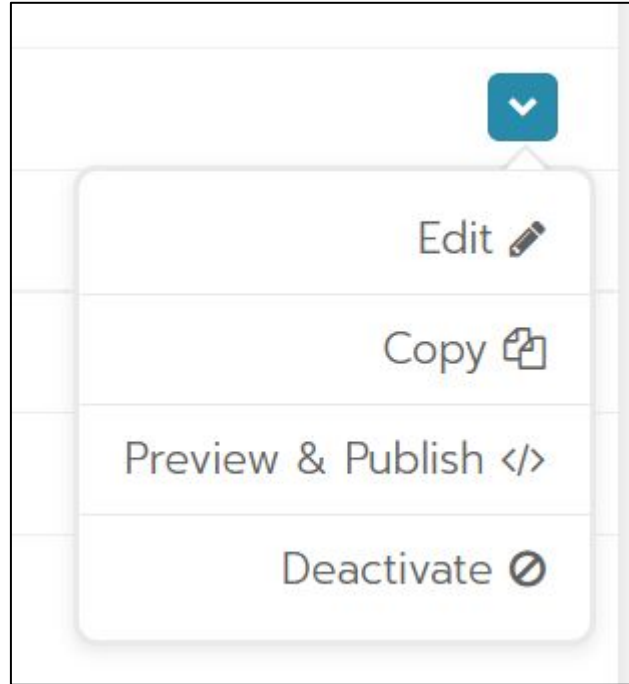
Add confirmation email to form

Take the
opportunity to
personalize the
confirmation



The screenshot shows the Bloomerang interface for editing a form titled "Registration for Lunch with Blossom". The left sidebar contains navigation options: Dashboard, Constituents, Groups, Reports, Letters, Emails, Social Hub, Data Tools, Settings (highlighted), and Kindful. The main content area is titled "Edit Form" and "Registration for Lunch with Blossom". A progress bar indicates "Step 1/2". Under the "Settings" section, the "Form Name" is "Registration for Lunch with Blossom". The "Active?" checkbox is checked, with the text "This form is active". The "Confirmation Email" section is highlighted with a green box. It contains the text "Interaction emails can be used as a custom confirmation email for this form." Below this is a dropdown menu with "None" selected. A blue dropdown menu is open, showing "None" and "2022 Bloom Volunteer sign up thank you Lunch with Blossom Confirmation Email". Below the dropdown is the text "An email will be sent to the following email addresses:" followed by "margie.worrell@bloomerang.com" and "Organization Email". An "Add Email" button is at the bottom.

Options from the blue dropdown arrow



Success page

Set up your message and give your constituents options to share with their networks!

Edit Form Pledge info from constituent

Step 2/2

Back to list Previous **Save and Preview**


Success Page

Build in Bloomerang Redirect to URL


Title
Pledge info confirmed

Message Body
sample message

Sharing

Twitter
bloomerangTech 

Tweet Button Follow Button

Facebook
facebook.com/bloomerangtech 

Share Button Like Button

Preview Form

This will show you the basic structure of your form.

Option to Self-Host Form is at the bottom of the page.

Still Not Right?

If you're a web developer and feel comfortable editing HTML, CSS, and JavaScript, click the button below. You can host the form yourself by pasting the code into your website and making any changes there. By doing this, changes you make to the form in Bloomerang will not be reflected on your website.

Self-Host Form



Preview Form Pledge info from constituent

Form Details

Contact Information

First Name *

Last Name *

Email *

Phone

Address

Country

Address

City

State

ZIP Code

Additional Information

Pledge amount

Pledge frequency

Method

Start date

Comments

Submit

Into the database we go!

Resources

Knowledgebase

[Create Constituent Information Forms](#)

[Create Volunteer Activity Forms](#)

[Create an Email Sign-up Form](#)

[Customize Confirmation Emails for Forms](#)

[Add Bloomerang Forms to Your Website](#)

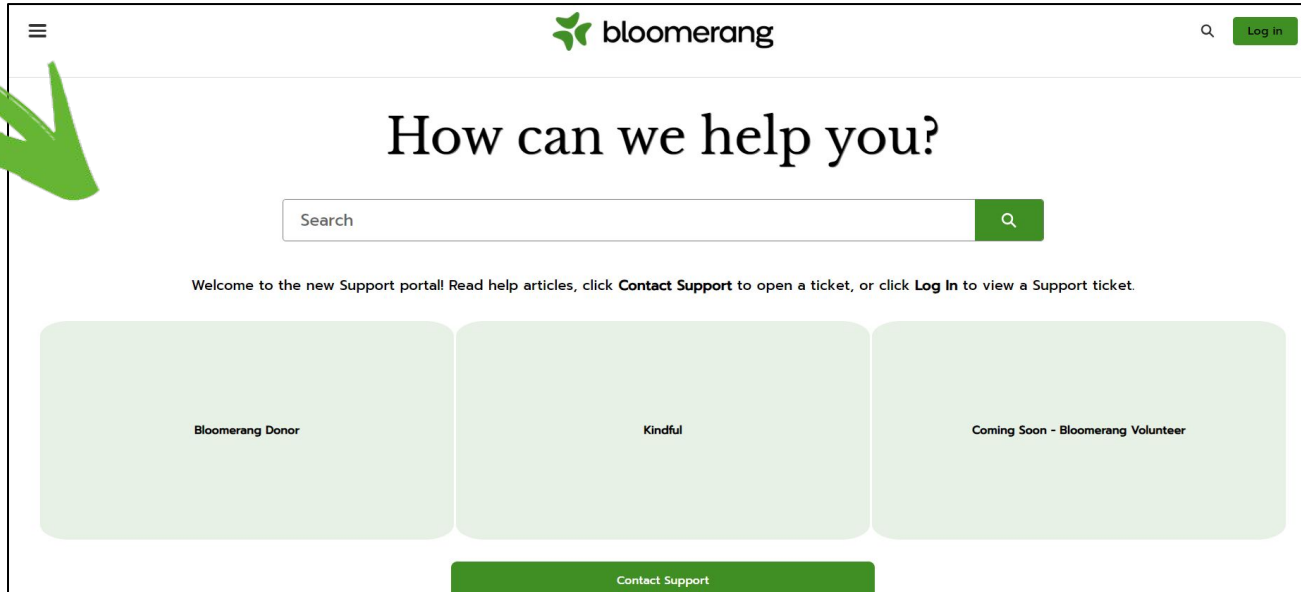
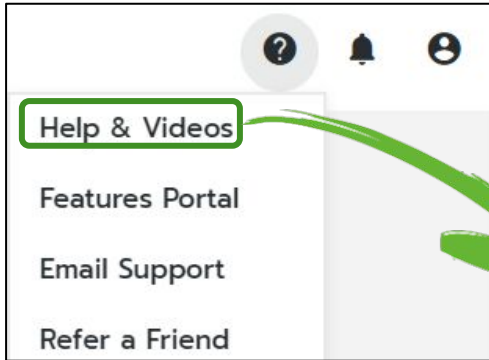
[Host Forms Securely](#)









[Create, Edit, and Revert Self-Hosted Forms](#)

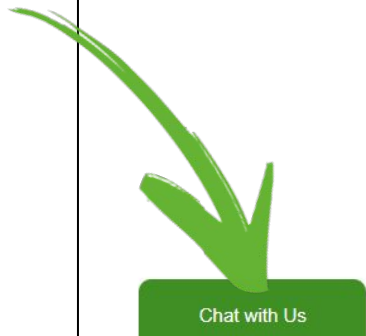


Resources

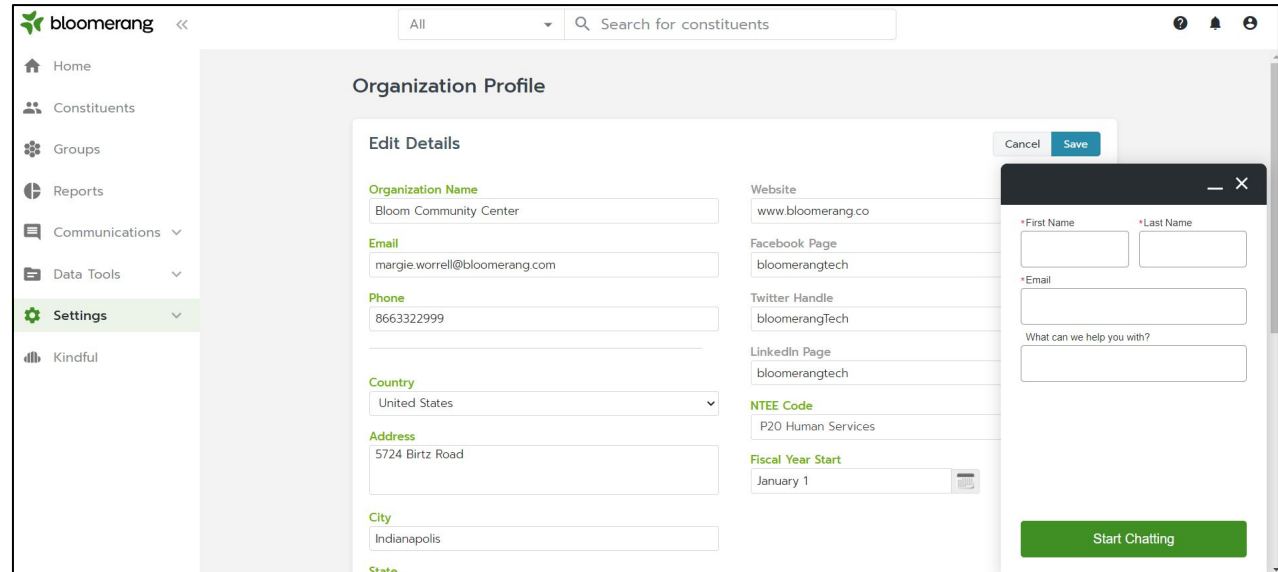
Bloomerang Knowledgebase and Support Portal



-  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 has 'Settings' highlighted. The main content area shows the 'Edit Details' form for an organization named 'Bloom Community Center'. The form includes fields for Organization Name, Email (margie.worrell@bloomerang.com), Phone (8663322999), Country (United States), Address (5724 Birtz Road), City (Indianapolis), Website (www.bloomerang.co), Facebook Page (bloomerangtech), Twitter Handle (bloomerangTech), LinkedIn Page (bloomerangtech), NTEE Code (P20 Human Services), and Fiscal Year Start (January 1). A 'Start Chatting' button is located at the bottom right of the form. A small chat window is also visible on the right side of the form.



Thank you for attending!

Visit our website to see more upcoming
Bloomerang Academy webinars!

