



Welcome to Bloomerang Academy

Thank you for joining us!



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

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

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

Cancel Save

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

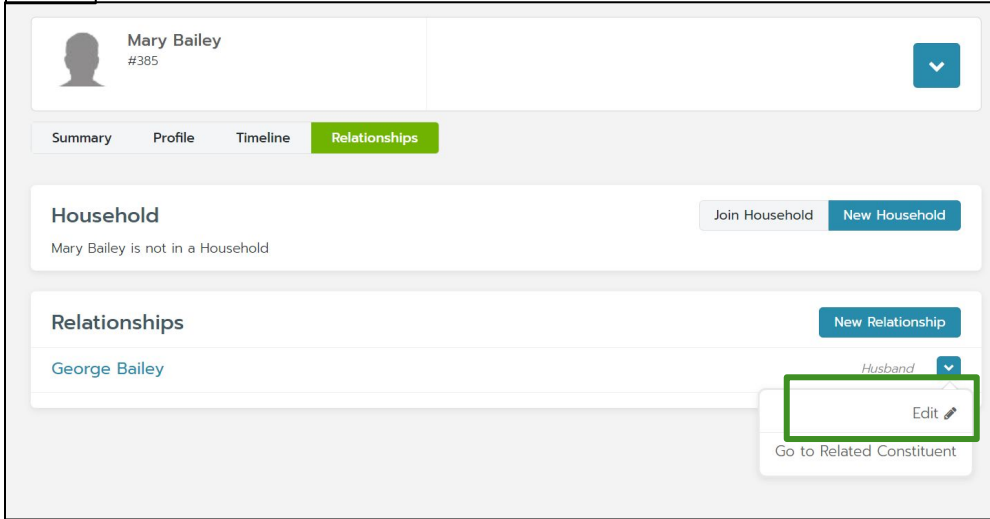
George Bailey

Husband



Edit or remove a relationship

1.



Mary Bailey
#385

Summary Profile Timeline **Relationships**

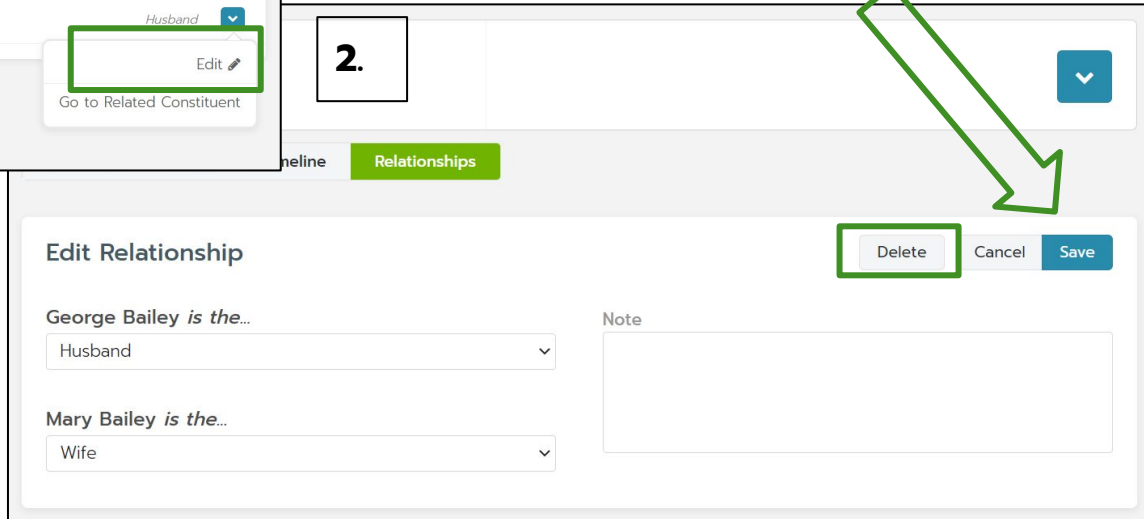
Household Join Household New Household
Mary Bailey is not in a Household

Relationships New Relationship

George Bailey Husband Edit
Go to Related Constituent

Don't forget to click save!

2.



Timeline **Relationships**

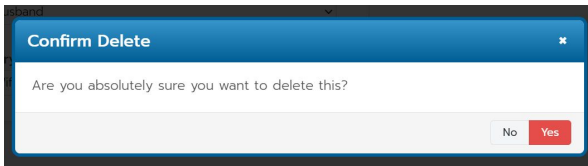
Edit Relationship Delete Cancel Save

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.


- Dashboard
- Constituents
- Reports
- Letters
- Emails
- Social Hub
- Data Tools
- Settings**
- Kindful

Settings

My Organization 


Edit your organization's name, contact info, and preferences.

[Edit](#)

Users 


Add/edit user accounts.

[Edit](#)

Transactions 


Manage Funds, Campaigns, Appeals, Tributes, Transaction Processors and Custom Fields for Transactions.

[Edit](#)

Interactions 


Manage your Custom Fields for Interactions.

[Edit](#)

Relationships 


Manage the roles available for relationships between Constituents.

[Edit](#)

Email 

Manage your Email Interests, anti-spam information, and Mailchimp integration.

[Edit](#)

QuickBooks Online 

















Manage your QuickBooks Online settings.

[Edit](#)

2.

Relationship Roles

Displaying 1 - 16 of 16

Brother	
Business	
Co-Worker	
Daughter	
Employee	
Employer	
Father	
Friend	
Husband	
Mother	
Owner	
Parent	
Partner	
Sister	
Son	
Wife	

Displaying 1 - 16 of 16

[New](#)

[All](#) [Active](#)

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.

Household profiles components

Summary

Shows all combined data from all members of the household. Household Members are 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	~100	~100	~100
'15	~100	~100	~100
'16	~100	~100	~100
'17	~100	~100	~100
'18	~100	~100	~100
'19	~100	~100	~100
'20	~100	~100	~100
'21	~100	~100	~100
'22	6260	~100	~100
'23	~100	~100	~100

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

Engagement Level

On Fire!

Generosity Update

Cool

[View in DonorSearch](#)

Recent Timeline Activity

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

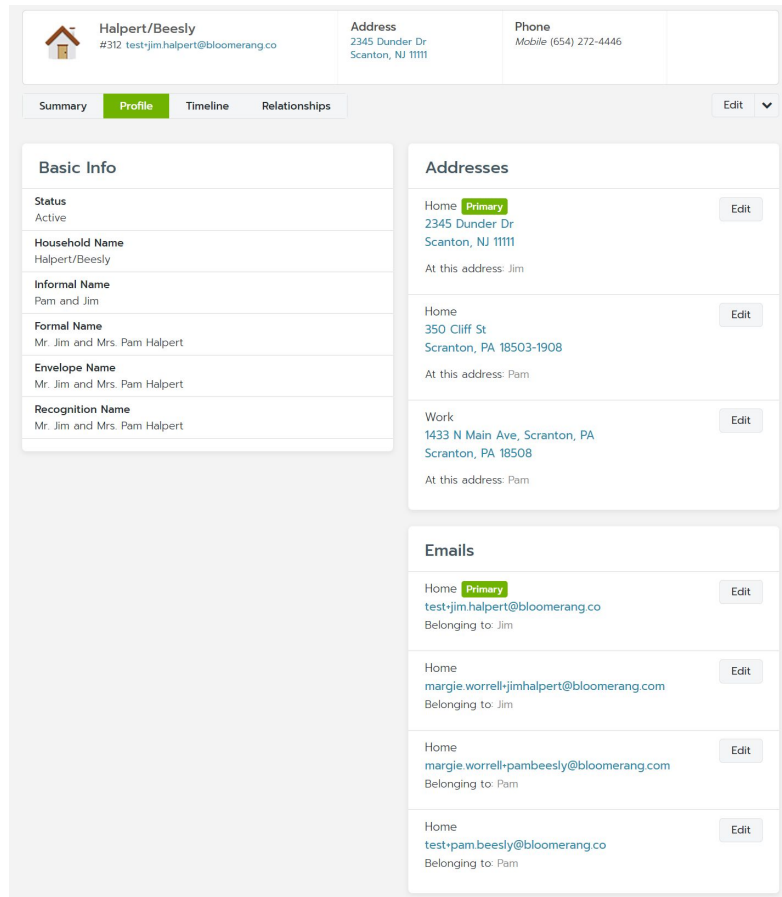
Household Members

- 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.



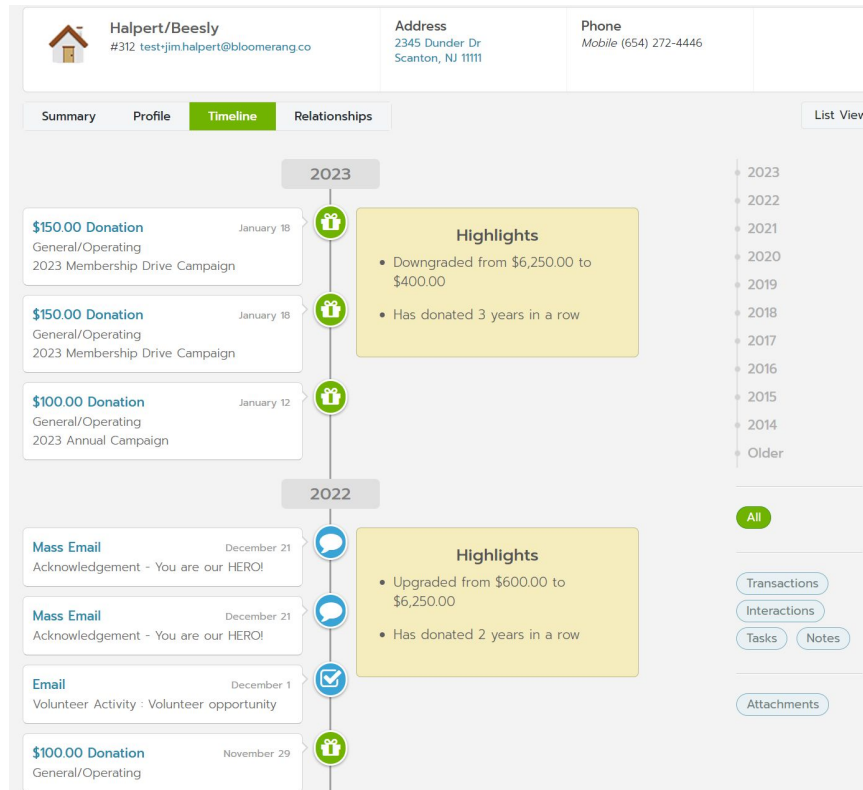
The screenshot displays the 'Profile' tab for a household named 'Halpert/Beesly'. The page is organized into several sections:

- 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:**
 - 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:**
 - 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:**
 - 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.



The screenshot displays the Bloomerang interface for a household profile. At the top, the household name is "Halpert/Beesly" with the email address "#312_test-jim.halpert@bloomerang.co". Contact information includes the address "2345 Dunder Dr Scanton, NJ 11111" and a mobile phone number "(654) 272-4446".

The main content area is a timeline view, with tabs for "Summary", "Profile", "Timeline" (selected), and "Relationships". A "List View" button is located in the top right corner. The timeline is organized by year, with 2023 and 2022 visible.

2023 Timeline:

- \$150.00 Donation** (January 18): General/Operating, 2023 Membership Drive Campaign. Highlight: Downgraded from \$6,250.00 to \$400.00.
- \$150.00 Donation** (January 18): General/Operating, 2023 Membership Drive Campaign. Highlight: Has donated 3 years in a row.
- \$100.00 Donation** (January 12): General/Operating, 2023 Annual Campaign.

2022 Timeline:


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

On the right side, there is a vertical year selector from 2023 to Older, and a filter menu with "All" selected, and buttons for "Transactions", "Interactions", "Tasks", "Notes", and "Attachments".

Household profiles components

Relationships


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

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

Address
2345 Dunder Dr
Scanton, NJ 11111

Phone
Mobile (654) 272-4446

Summary Profile Timeline Relationships

 Halpert/Beesly

Jim Halpert	Head of Household	▼
Pam Beesly	Member	▼

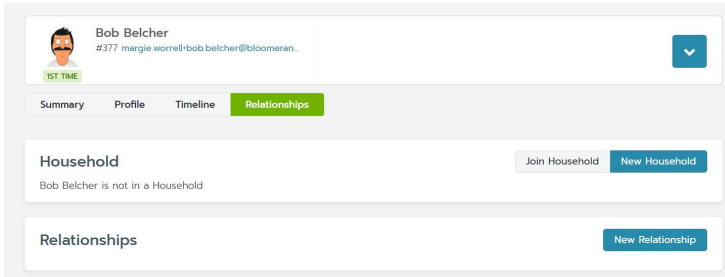
Relationships

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.



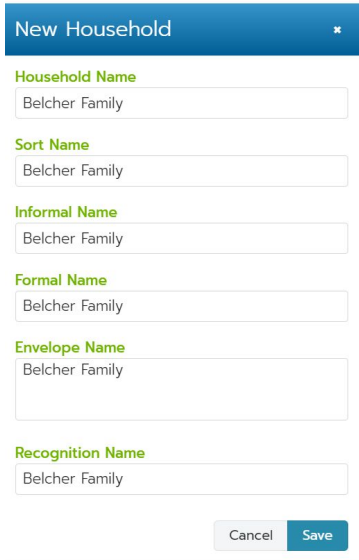
Bob Belcher
#377 margie.worrell+bob.belcher@bloomeran...
1ST TIME

Summary Profile Timeline Relationships

Household Join Household New Household
Bob Belcher is not in a 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.

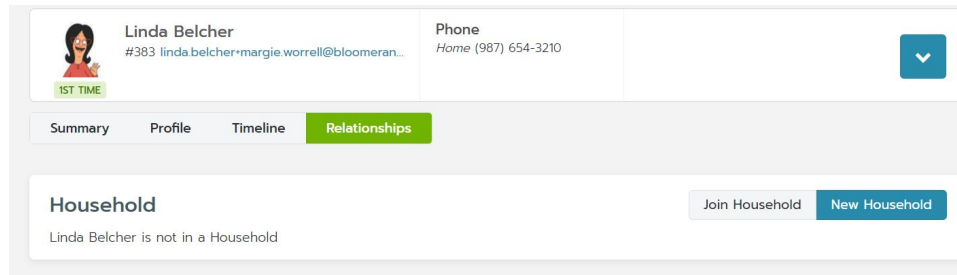


Bob Belcher
🏠 Belcher Family
#377 margie.worrell+bob.belcher@bloomeran...
1ST TIME

Adding a new Household member

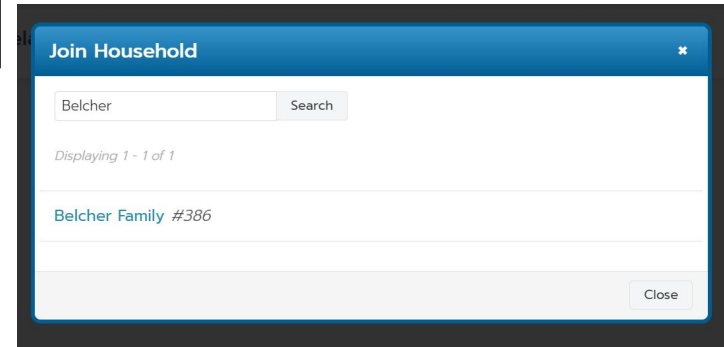
- Search for member to add
- Click on Relationships tab
- Click on Join Household
- Search for the correct household

1.



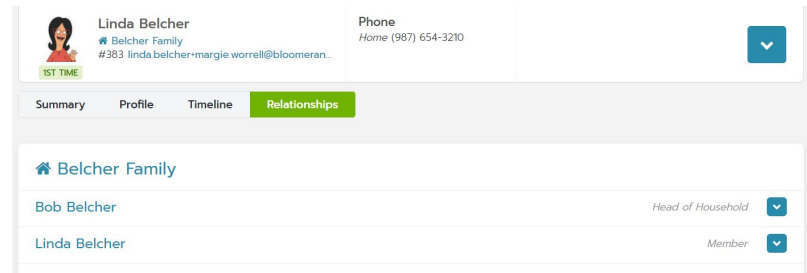
User profile card for Linda Belcher. The card shows her name, phone number, and email address. Below the profile information are tabs for Summary, Profile, Timeline, and Relationships. The Relationships tab is selected. At the bottom, there is a 'Household' section with the text 'Linda Belcher is not in a Household' and two buttons: 'Join Household' and 'New Household'.

2.



A 'Join Household' dialog box with a search bar containing 'Belcher' and a 'Search' button. Below the search bar, it says 'Displaying 1 - 1 of 1'. A search result is shown: 'Belcher Family #386'. There is a 'Close' button at the bottom right.

3.




User profile card for Linda Belcher, showing the 'Relationships' tab. The 'Belcher Family' household is listed with members: 'Belcher Family' (Head of Household), 'Bob Belcher' (Head of Household), and 'Linda Belcher' (Member).

Head of the Household

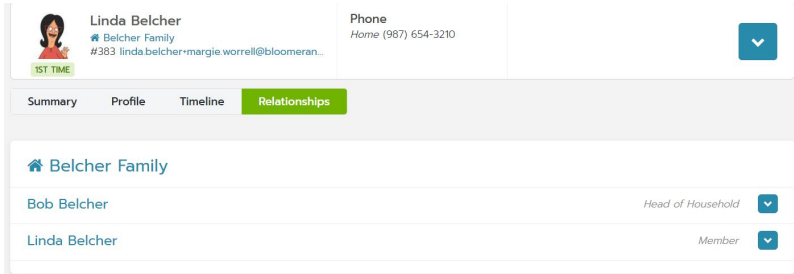
Simply means that this is the info to be used when communicating with all members.

- 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 'Relationships' tab for Linda Belcher. At the top, there is a header for 'Linda Belcher' with a dropdown arrow. Below this, there are tabs for 'Summary', 'Profile', 'Timeline', and 'Relationships'. The 'Relationships' tab is active. Underneath, there is a section for 'Belcher Family' with two members listed: 'Bob Belcher' (Head of Household) and 'Linda Belcher' (Member). Each member has a dropdown arrow next to their name.


2.



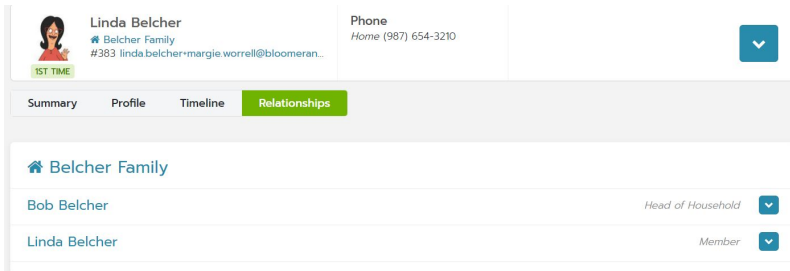
The screenshot shows a dropdown menu for a household member. It contains three options: 'Edit' with a pencil icon, 'Make Head of Household' with a magnifying glass icon, and 'Leave Household' with an 'X' icon.

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 for the household, titled 'Belcher Family'. It lists two members: Bob Belcher, who is the Head of Household, and Linda Belcher, who is a Member. Each member has a dropdown arrow next to their name, indicating that the head of household can be changed.

2.

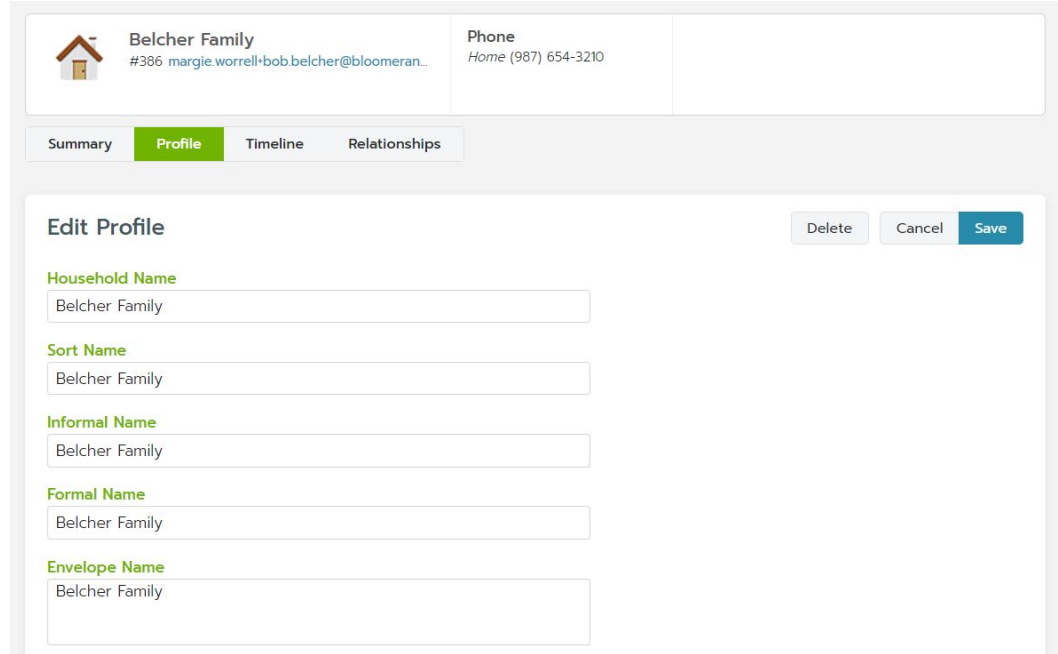


The modal dialog shows three options for changing the head of household. At the top right is an 'Edit' button with a pencil icon. Below it are two buttons: 'Make Head of Household' with a key icon, and 'Leave Household' with an 'X' icon.

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.



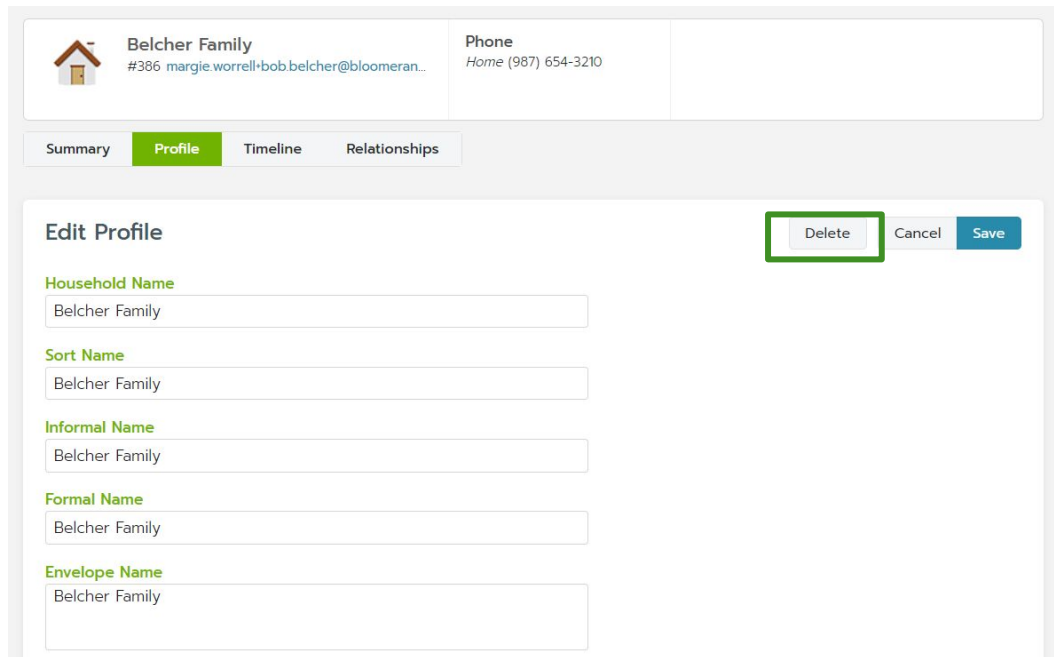
The screenshot displays the Bloomerang interface for editing household profile data. At the top, a header bar shows a house icon, the household name 'Belcher Family', a contact email '#386 margie.worrell+bob.belcher@bloomeran...', and a phone number 'Home (987) 654-3210'. Below this is a navigation bar 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 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 displays the Bloomerang interface for a household named "Belcher Family". At the top, there is a header section 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 the value "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".

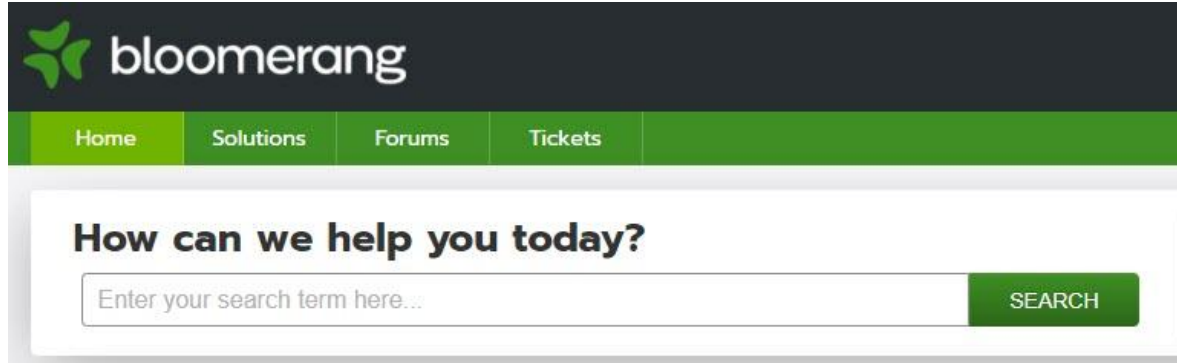
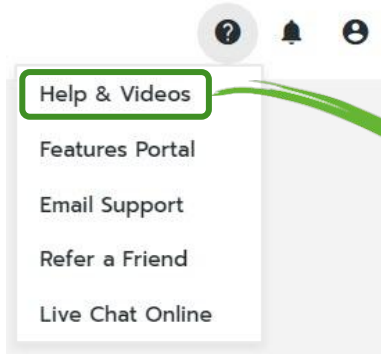
Large, vibrant green monstera leaves with characteristic holes are positioned in the top-left and bottom-left corners of the slide.

**Let's get into the
database!**

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

Resources

Bloomerang Knowledgebase and Support Portal



Resources

Knowledgebase

[Constituents](#)

[Relationships and Households](#)

[Creating a new relationship role](#)

[Report on Relationships](#)

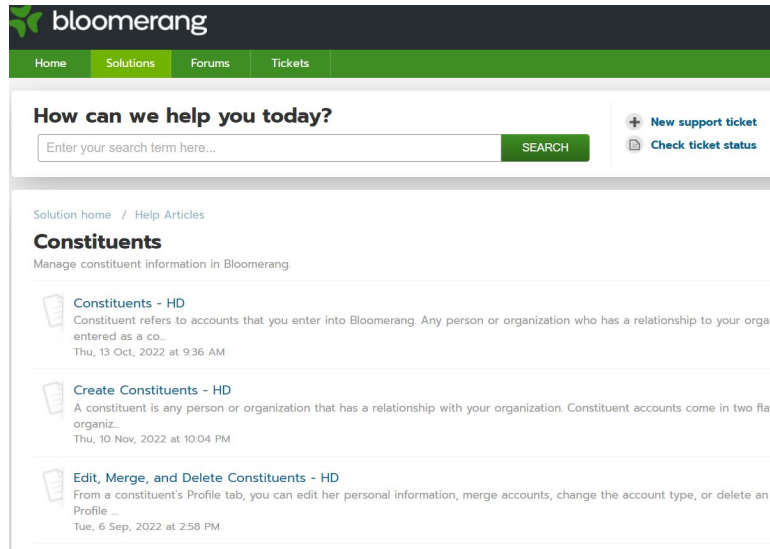
[How and Why Should I Create Households?](#)



Bloomerang Academy

[Bloomerang Constituents and Households](#)

[Working with Constituents Part 1](#)



The screenshot displays the Bloomerang Knowledgebase interface. At the top, there is a navigation bar with the Bloomerang logo and menu items: Home, Solutions, Forums, and Tickets. Below the navigation bar is a search section with the heading "How can we help you today?". It features a search input field with the placeholder text "Enter your search term here...", a green "SEARCH" button, and two links: "+ New support ticket" and "Check ticket status".


The main content area shows the breadcrumb "Solution home / Help Articles" followed by the heading "Constituents" and the sub-heading "Manage constituent information in Bloomerang." Below this, there are three search results, each with a document icon, a title, a description, and a timestamp:

- Constituents - HD**
Constituent refers to accounts that you enter into Bloomerang. Any person or organization who has a relationship to your organization entered as a co...
Thu, 13 Oct, 2022 at 9:36 AM
- Create Constituents - HD**
A constituent is any person or organization that has a relationship with your organization. Constituent accounts come in two flavors...
Thu, 10 Nov, 2022 at 10:04 PM
- Edit, Merge, and Delete Constituents - HD**
From a constituent's Profile tab, you can edit her personal information, merge accounts, change the account type, or delete an account...
Tue, 6 Sep, 2022 at 2:58 PM

A large, vibrant green Monstera leaf with characteristic holes, positioned in the top-left corner of the slide.

Thank you for attending!

Visit our website to see more upcoming
Bloomerang Academy webinars!

A smaller, vibrant green Monstera leaf with characteristic holes, positioned in the bottom-right corner of the slide.