




Welcome to Bloomerang Academy

Thank you for joining us!

Please tell us where you are joining us from and what the weather is like where you are...drop it in the CHAT!



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

Our dial in number in case you need it today: **+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!

Email Templates in Bloomerang



Evan Johnson

Instructional Delivery & Design Specialist

Evan Johnson is an Instructional Delivery & Design Specialist at Bloomerang. He has worked as a Database Coach and on the Support team before coming over to the Customer Education team.

He currently lives in Cincinnati, OH with his wife and their two cats. He loves improv and is a big Philadelphia and Alabama sports fan.



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.



Agenda

1. Template Background Info
2. Creating and Accessing Your Templates
3. Locking Sent Emails–what does this mean?
4. Demo in Bloomerang
5. Resources and Q&A



What is an Email Template?

An email template is a pre-designed layout for an email that can be used as a starting point for creating new emails.

Templates can include a variety of elements, such as:

- Headers, footers, and body sections
- Text, images, and videos
- Formatting options for colors, fonts, and backgrounds
- Placeholders for personalized information, like the recipient's name or a specific date
- Organization logos

Why would I use an Email Template?

Email templates can be used to save time and resources, especially for emails that are sent frequently:

- Newsletters
- Donation requests
- Responses to stakeholders

They can also help ensure that email designs follow brand guidelines.

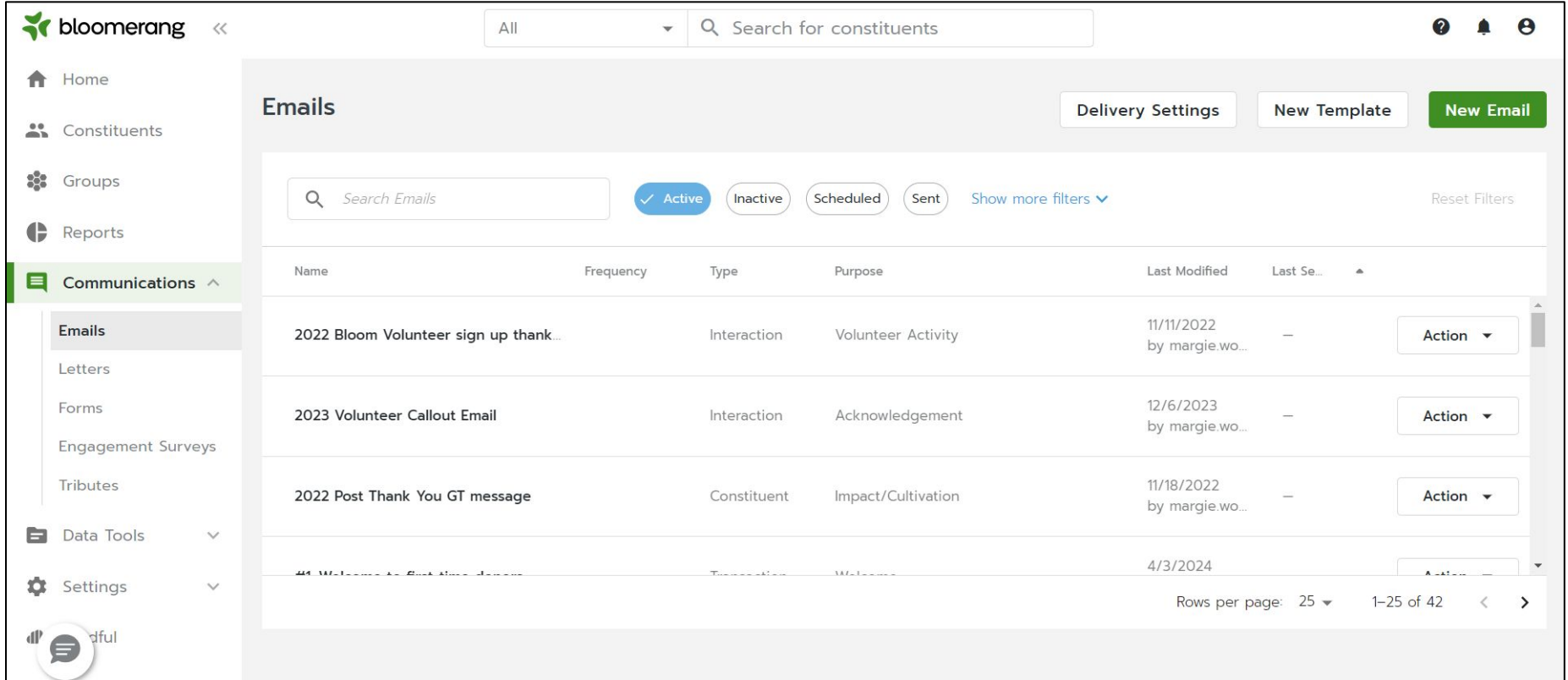
Template Tips

1. Personalize
2. Show gratitude
3. Impact messaging
4. Graphics that grab attention
5. Include a CTA

Templates in Bloomerang



New User-created Email Templates



The screenshot displays the Bloomerang web interface. On the left is a navigation sidebar with icons and labels for Home, Constituents, Groups, Reports, Communications, Emails, Letters, Forms, Engagement Surveys, Tributes, Data Tools, and Settings. The main content area is titled "Emails" and includes a search bar, filter buttons for Active, Inactive, Scheduled, and Sent, and a "New Email" button. Below these is a table of email templates with columns for Name, Frequency, Type, Purpose, Last Modified, and Last Seen. The table lists three templates: "2022 Bloom Volunteer sign up thank...", "2023 Volunteer Callout Email", and "2022 Post Thank You GT message". At the bottom right, it shows "Rows per page: 25" and "1-25 of 42".

Navigation Sidebar:

- Home
- Constituents
- Groups
- Reports
- Communications**
 - Emails**
 - Letters
 - Forms
 - Engagement Surveys
 - Tributes
- Data Tools
- Settings

Main Content Area:

Emails [Delivery Settings] [New Template] [New Email]

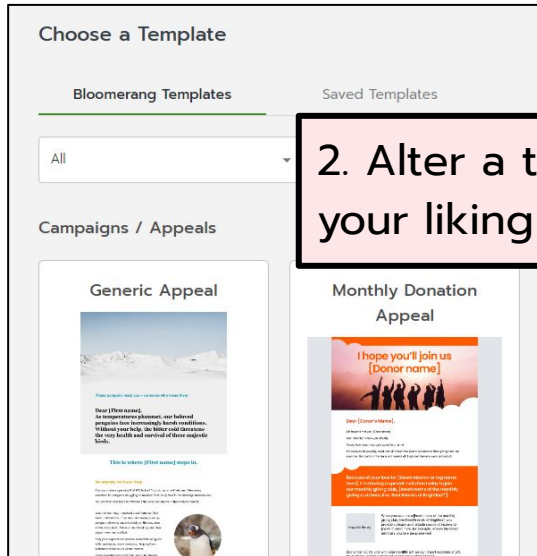
Search Emails [Active] [Inactive] [Scheduled] [Sent] Show more filters [Reset Filters]

Name	Frequency	Type	Purpose	Last Modified	Last Se...	
2022 Bloom Volunteer sign up thank...		Interaction	Volunteer Activity	11/11/2022 by margie.wo...	-	Action
2023 Volunteer Callout Email		Interaction	Acknowledgement	12/6/2023 by margie.wo...	-	Action
2022 Post Thank You GT message		Constituent	Impact/Cultivation	11/18/2022 by margie.wo...	-	Action
41 Welcome to First Time donors		Transaction	Welcome	4/3/2024		Action

Rows per page: 25 1-25 of 42

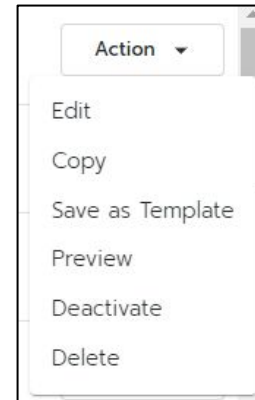
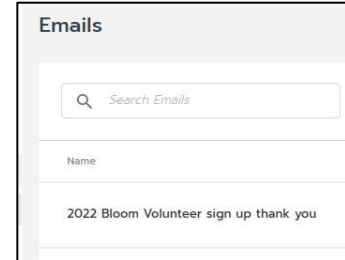
Creating Your Own Template—two ways

1. Click New Template



2. Alter a template to your liking

1. Use an existing email



2. Click Action and then Save as a Template.

Accessing Your Templates

1. Click New Email

Delivery Settings

New Template

New Email

Choose a Template

2. Click on Saved Templates

Bloomerang Templates

Saved Templates



Search Templates

Types




Purposes



Sent Emails

View Email
View the details of this sent email. To edit the content and recipients, make a copy of this email.

^ Volunteer thank you for signing up

Purpose: Acknowledgement Type: Transaction 

Tracking Header Design Recipients

Launched:
74 messages at 8:38 AM 10/27/2022

Launched Queued Sent Opened

Deliverability
74 Emails

100% Delivered

Open Stats
74 Emails

85% Opened

Recipient Engagement

- 2 Clicked a link
- 0 Unsubscribed
- 0 Marked as Spam

Most Clicked Links

- 1 <http://www.bloomerang.co>
- 1 <https://crm.bloomerang.co/Mailing/Email/Reci...>

Delivered Opened Unopened

Sent emails are  locked and cannot be edited.

View Email

View the details of this sent email. To edit the content and recipients, make a copy of this email.

2023 Giving Tuesday Donation Request2

Purpose *
Solicitation

Type
Constituent



Tracking Header Design Recipients

Email Interests

Newsletter


Event

Volunteer Information

Expanded Filters View

Collapse All Expand All

Include

▶ Has any  Specific Transactions
AND Cause interests is 'Animal welfare'

Exclude

Status is 'Inactive' or 'Deceased'
AND Communication Restrictions is 'Do Not Solicit'

You can view the Design and Recipient criteria through *Expanded Filters View*.

View Email
View the details of this sent email. To edit the content and recipients, make a copy of this email.

Monthly Email Scheduled for Thursday, October 3, 2024 9:00 AM
in change when the email sends with the schedule.

Education Newsletter

From: Impact/Cultivation To: Constituent

Tracking Header Design Recipients

Launched:
21 messages at 09:04 AM 10/03/24

Launched Queued Sent

Deliverability
23 Emails

57% Delivered

Delivered Dropped

Open Stats
13 Emails

0% Opened

Unopened

Recipient Engagement

- 0 Clicked a link
- 0 Unsubscribed
- 0 Marked as Spam

Most Clicked Links
No links have been clicked.

Launched:
22 messages at 09:07 AM 10/03/24

Launched Queued Sent

Deliverability
23 Emails

55% Delivered

Delivered Dropped

Open Stats
12 Emails

0% Opened

Unopened

Recipient Engagement

- 0 Clicked a link
- 0 Unsubscribed
- 0 Marked as Spam

Most Clicked Links
No links have been clicked.

So what do you need to do?

If you have been “reusing” emails, they will be **locked** for editing starting September 19th.

What can you do about it?

1. Copy the email and edit it for reuse.
2. Make it into a template! Then you can use it over and over.

Into Bloomerang we go!

Resources

Knowledgebase

[Edit Email Content](#)

[Create and Preview Emails](#)

[Handle Skipped Recipients when
Generating Emails](#)

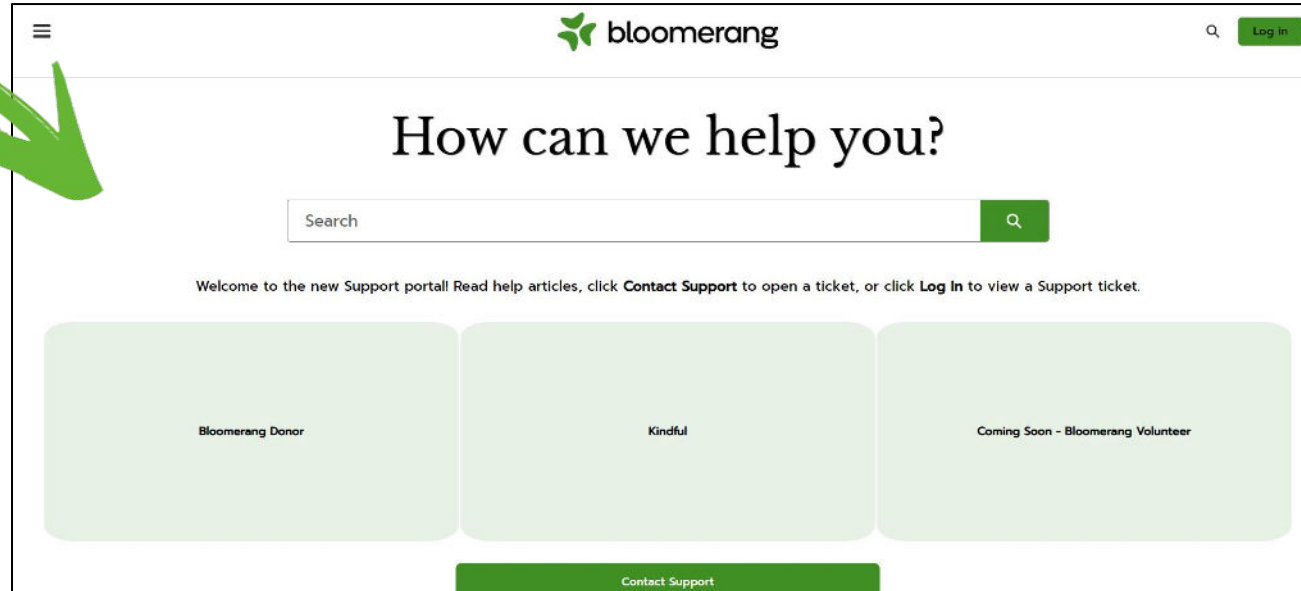
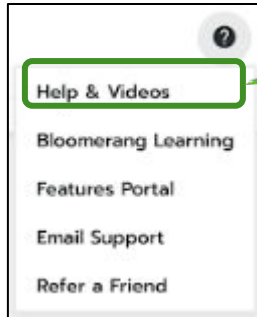
[Best Practices for Email Templates](#)

[Tour of our Email Features](#)



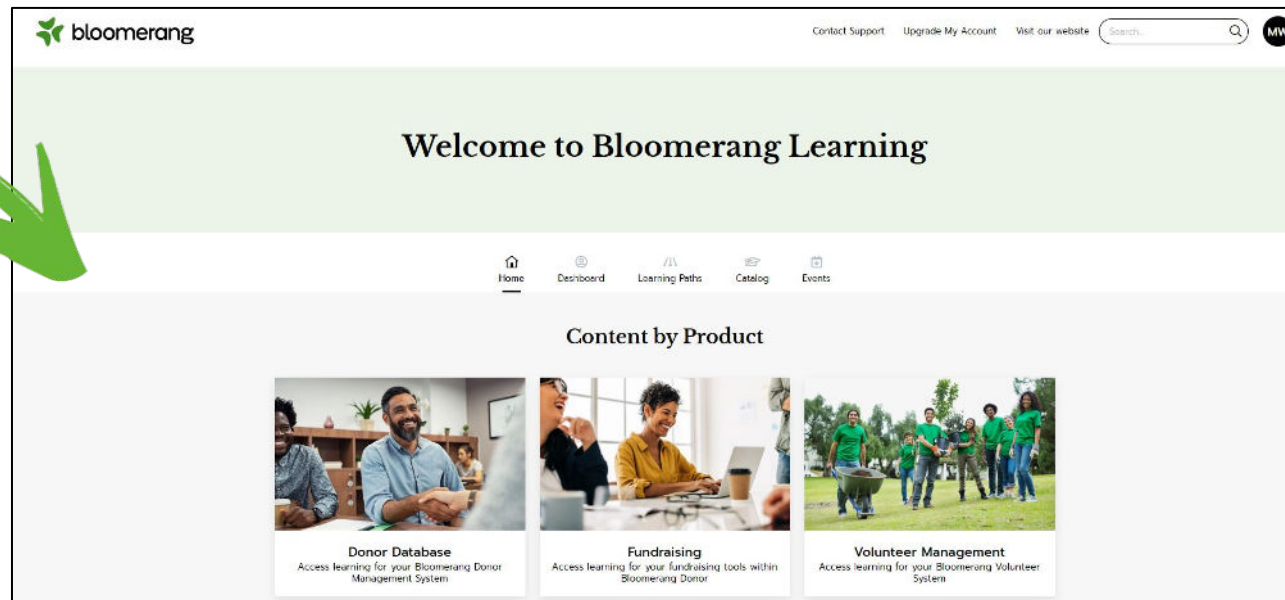
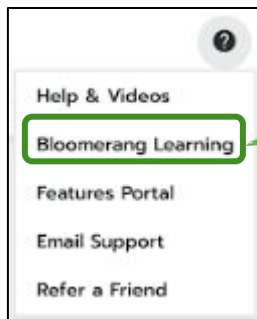
Resources

Bloomerang Knowledgebase and Support Portal



Resources

Bloomerang Learning – our new on-demand learning platform



bloomerang Contact Support Upgrade My Account Visit our website MW


Welcome to Bloomerang Learning

[Home](#) [Dashboard](#) [Learning Paths](#) [Catalog](#) [Events](#)


Content by Product



Donor Database
Access learning for your Bloomerang Donor Management System



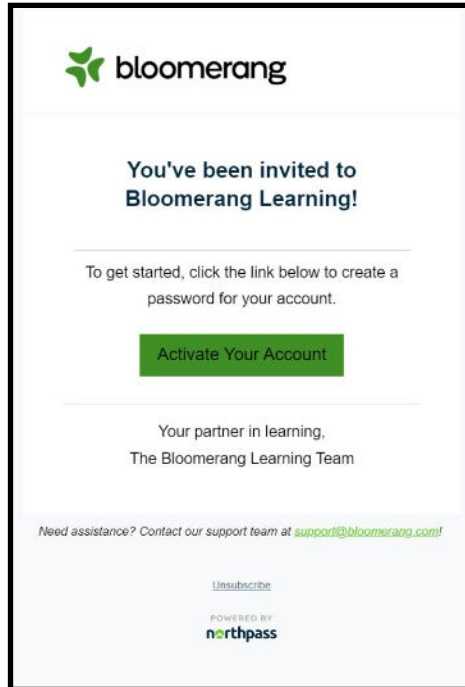
Fundraising
Access learning for your fundraising tools within Bloomerang Donor



Volunteer Management
Access learning for your Bloomerang Volunteer System

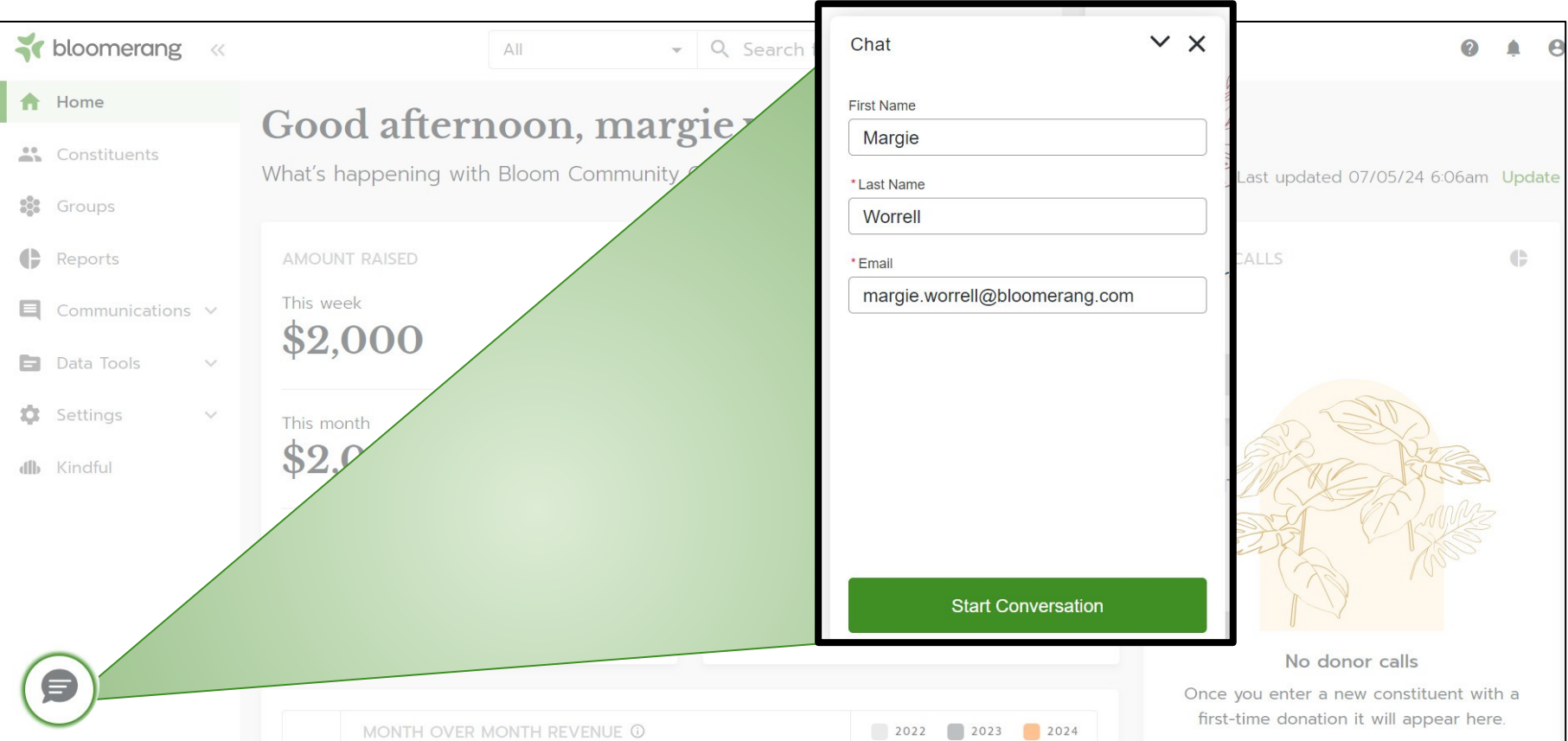
Resources

Bloomerang Learning – our new on-demand learning platform



If you did not receive this email to activate your Bloomerang Learning account, please reach out to support!

Live Chat to get online assistance immediately



The image shows a screenshot of the Bloomerang dashboard with a chat window overlay. The dashboard includes a sidebar with navigation options: Home, Constituents, Groups, Reports, Communications, Data Tools, Settings, and Kindful. The main content area displays a greeting "Good afternoon, margie" and a section for "AMOUNT RAISED" showing "This week \$2,000" and "This month \$2,000". A search bar and a dropdown menu are visible at the top. The chat window, titled "Chat", contains a form with the following fields:

- First Name:
- *Last Name:
- *Email:

At the bottom of the chat window is a green button labeled "Start Conversation". The background of the dashboard shows a "No donor calls" message with a plant illustration and the text: "Once you enter a new constituent with a first-time donation it will appear here." A green triangle points from the chat icon in the bottom left corner of the dashboard to the chat window.


Poll



Large, vibrant green Monstera leaves with characteristic holes, positioned on the left side of the slide.

Thank you for attending!

Visit our website to see more upcoming
Bloomerang Academy webinars!

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