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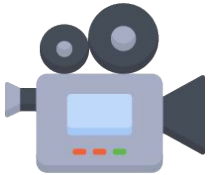
Intermediate Reports & Filters Part 1

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

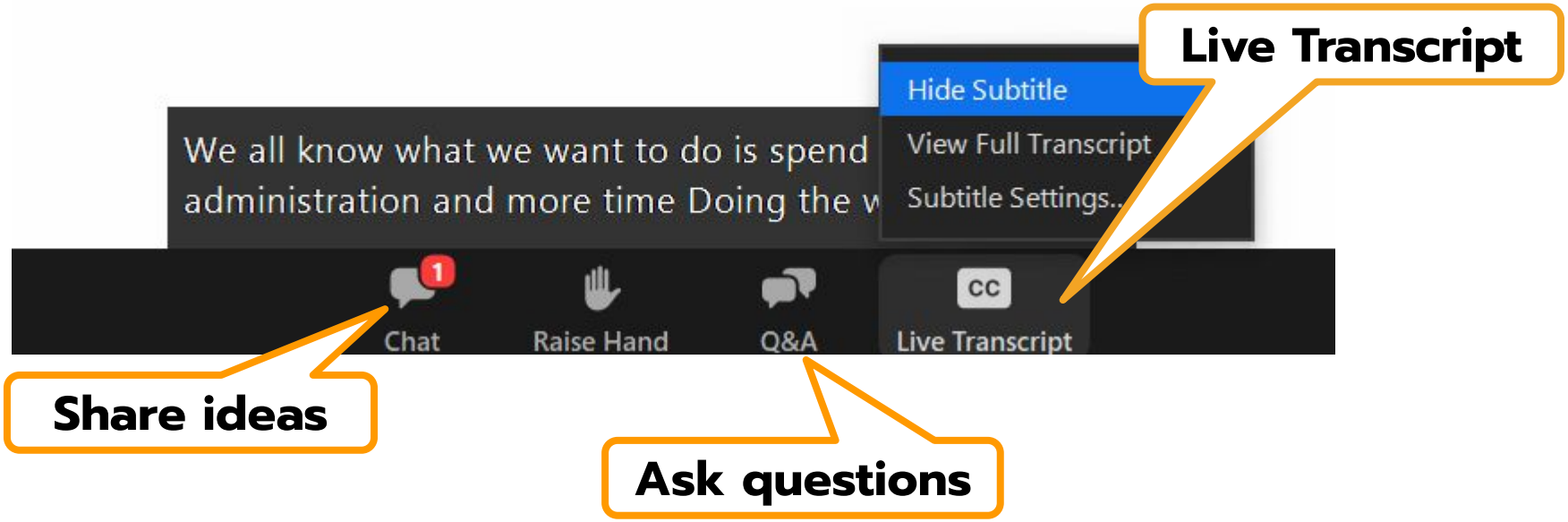


We're recording this webinar! We'll send you a link to the recording and copy of the slides within 48 hours.

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



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

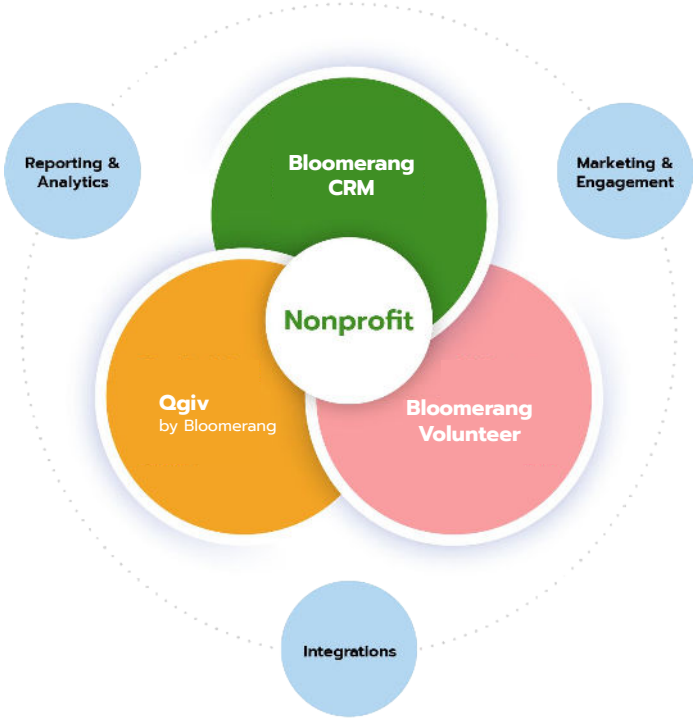
Industry leading solutions

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.

Megan Collins

Data Migration Associate

Megan has been with Bloomerang since early 2020 and spent over two years in the Customer Support Department. She now works in the Implementations Department as a Data Migration Associate. Before joining Bloomerang, Megan gained customer service, administrative, and event management skills in the hospitality industry through various roles at world-class hotels and theme parks.

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HAPPY GIVING TUESDAY!!!

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In the Beginning Class, you...

1. Learned how to copy & rename reports
2. Took a look at Report Templates
3. Learned about different report types
4. Saw some simple column work
5. Saw some simple filter work

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Today, you will...

1. Learn how to work with nested filters
2. Explore cross-data reporting capabilities

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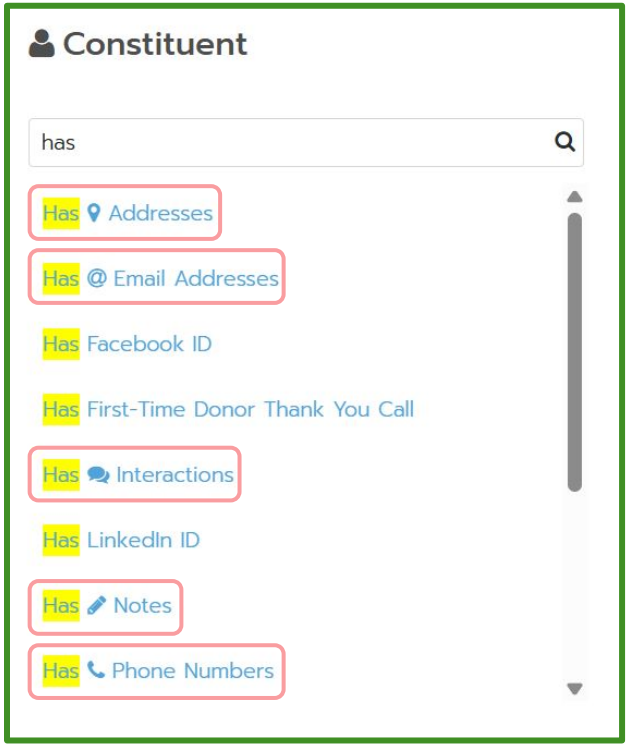
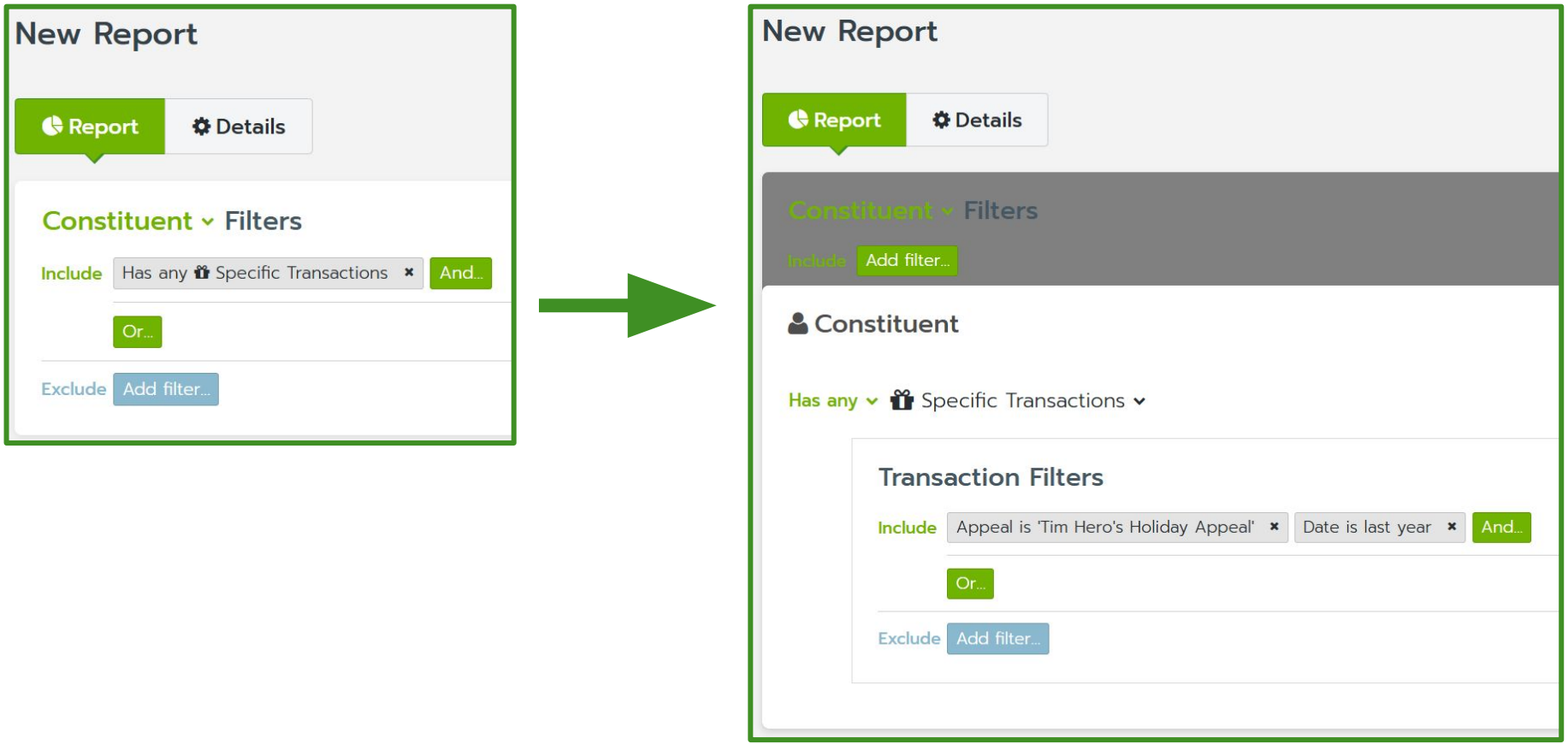
Nested Filters

What is a nested filter?

A filter with more filters inside of it!

Any filter option that begins with "Has" followed by an icon is an indicator of a nested filter that can be added.




New Report
Report
Details
Constituent Filters
Include
Has any Specific Transactions
And...
Or...
Exclude
Add filter...
New Report
Report
Details
Constituent Filters
Include
Add filter...
Constituent
Has any
Specific Transactions
Transaction Filters
Include
Appeal is 'Tim Hero's Holiday Appeal'
Date is last year
And...
Or...
Exclude
Add filter...

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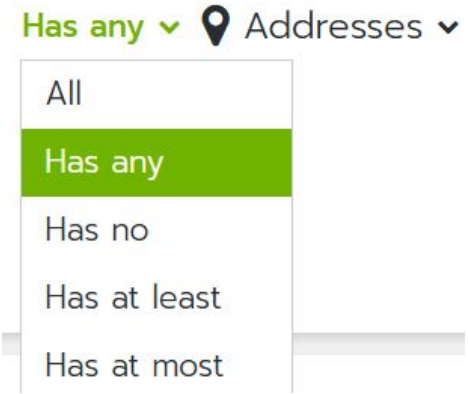
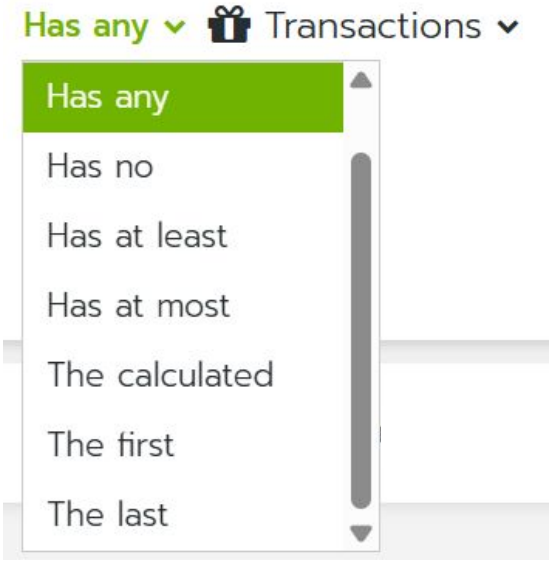
Customize your filter





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Filter for Contact Information

Has Addresses

Has @ Email Addresses

Has Phone Numbers

Filter for Specific Timeline Items

Has Transactions

Has Interactions

Has Notes

Filter for Other Information

Has Relationships

Has Tasks

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With Contact Info Filters, you can filter by people who...

- Live in certain areas
- Have bad addresses
- Do not have email addresses
- Prefer to be contacted at work
- And more!

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With Timeline Entry Filters, you can filter by people who...

- Opened mass emails
- Were sent holiday cards last year
- Made their first gift during a certain time frame
- Have done specific volunteer tasks
- And more!

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Let’s try it out!

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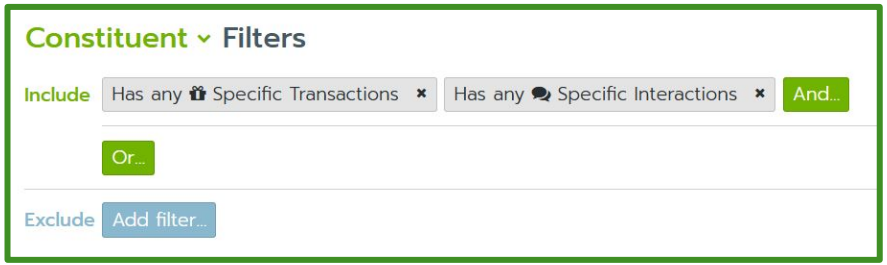
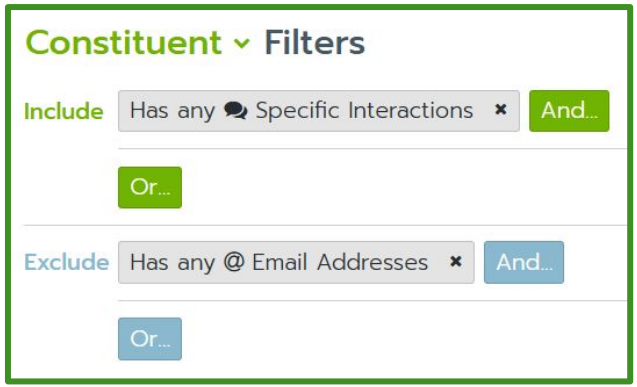
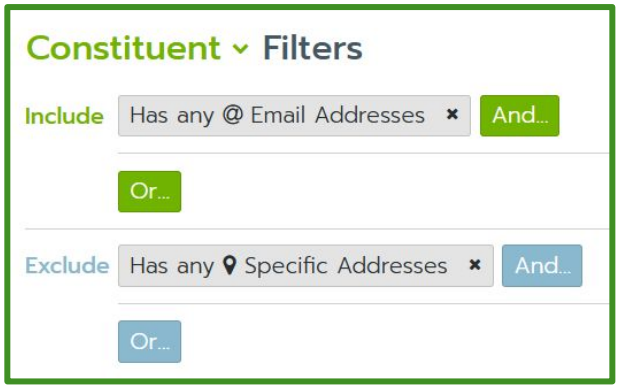
Cross-Data Reporting

Combine nested filters







You can report on people who...

- Have engaged with your organization, but never given
- Have one contact info type that is bad or missing, but have another contact info type that is valid
- Gave last holiday season, but has not been sent this year's holiday mail appeal
- And more!

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Let’s try it out!

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And there's one thing I want you to remember...

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NEVER put an Exclude inside of an Exclude!*

This creates a double negative!

*unless support or a coach tells you to

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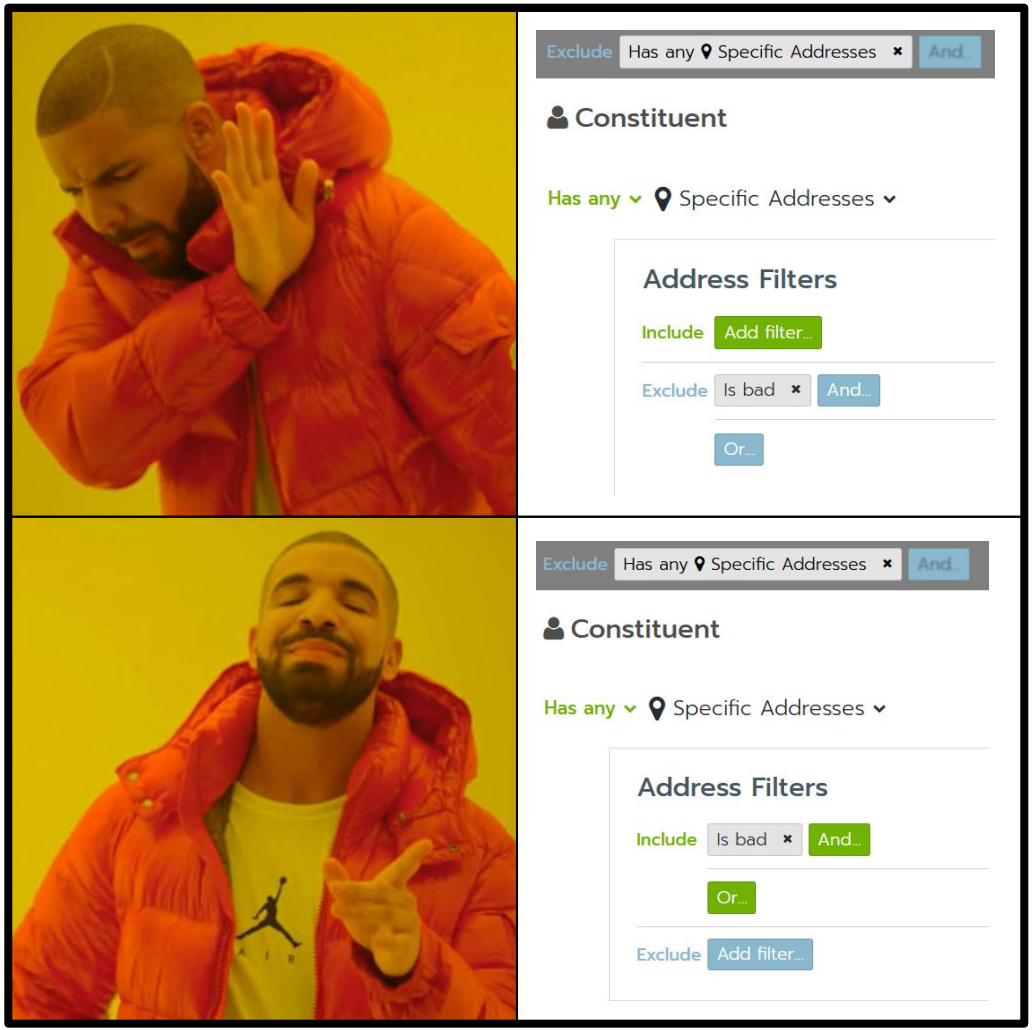
Exclude
Has any Specific Addresses
And...
Constituent
Has any
Specific Addresses
Address Filters
Include
Add filter...
Exclude
Is bad
And...
Or...
Exclude
Has any Specific Addresses
And...
Constituent
Has any
Specific Addresses
Address Filters
Include
Is bad
And...
Or...
Exclude
Add filter...

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Q&A

Resources

Knowledgebase

Create Reports

Report Columns and Filters

Use Filters from Another Report

Scheduled Reports Best Practices

Filter for Multiple Criteria

Other Resources

Love At First Sight: Getting To The Heart Of Fundraising With Effective Reporting

Bloomerang 2024 Update: Advanced Reporting to Revolutionize Volunteer Impact Analysis

Transform Your Nonprofit Annual Report Into A Powerful Fundraising Tool

Thanks for joining!

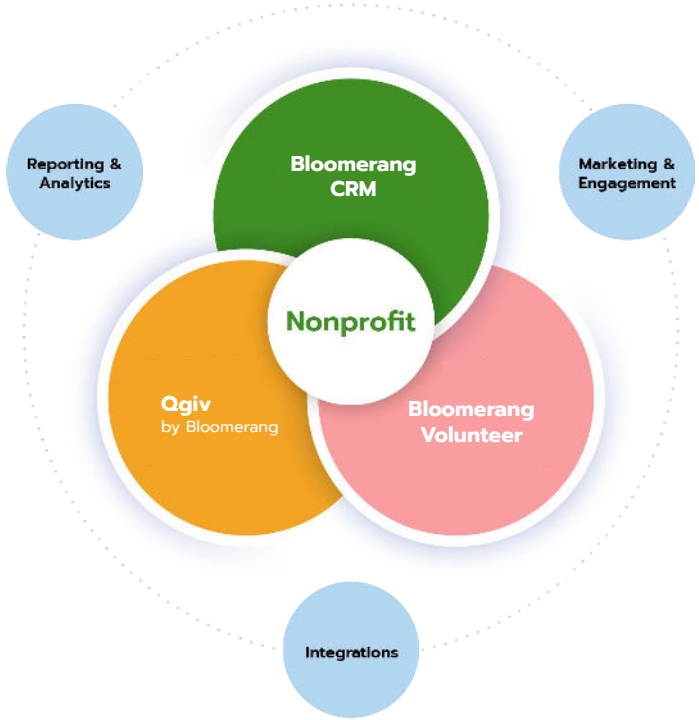
More tools and resources to help you grow.

Connect with us!
support@bloomerang.com

Request a demo
Bloomerang.co/demo

New! Bloomerang Learning on-demand training

Visit the Knowledge Base for more "how-to" articles.



We'd appreciate your feedback.

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

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Thank you!