

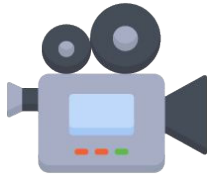
Working with Constituents: Relationships and Households

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.

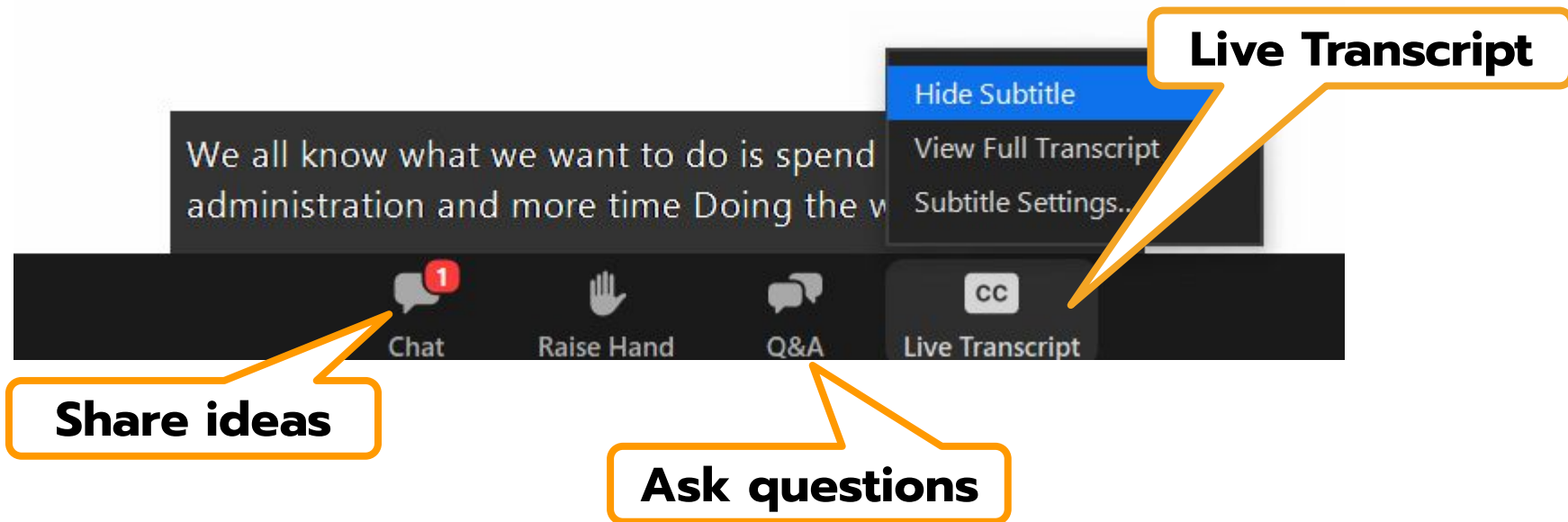


Feel free to ask questions! Use the Q&A option to ask questions and the chat option for general discussion. We'll answer questions at the end of the presentation.



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

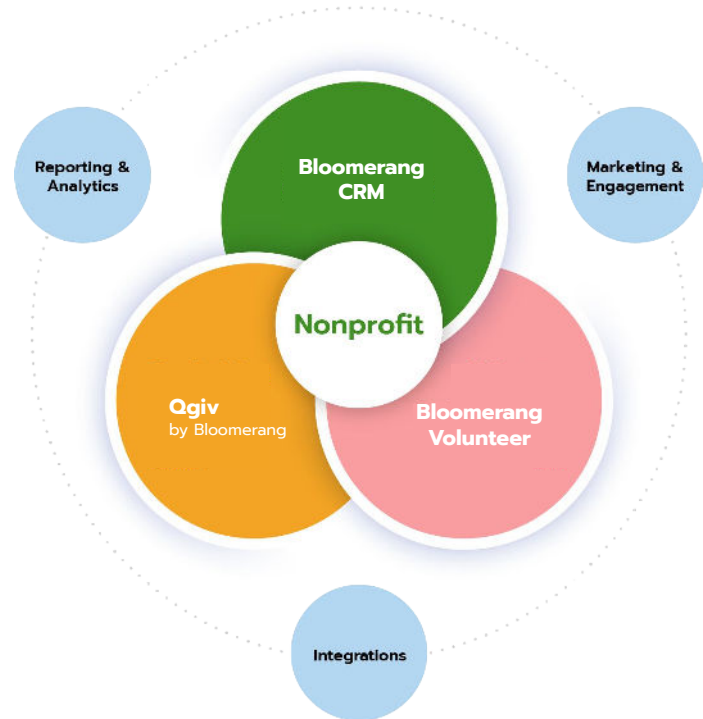
Industry leading
solutions

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.

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.



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
- Primary contact information
- Head of Household
- Create a Household
- Add and Remove Household Members
- Change Head of Household
- Edit Household Name Data
- Delete a Household

Relationship Managers

- How to assign them
- How to edit or remove them

Reporting on Relationships, Households and Relationship Managers


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**
Bailey Family #385

Address
5 Olmstedville Rd
Pottersville, NY 12860


Phone
Home (336) 215-5765






Summary Profile Timeline **Relationships**


Relationship Manager 

No Relationship Manager Assigned

 **Bailey Family**

George Bailey Sr.	Head of Household	
Mary Bailey	Member	

Relationships 

George Bailey Sr.	Husband	
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Add a relationship

Summary Profile Timeline **Relationships**

New Relationship

Cancel Save

Find Constituent *is the...*

Mary Bailey *is the...*

Note

Find Constituent

George Search

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 12852
George Louis Costanza M.D. #B3 784 4609 Lobortis Rd New G	

Summary Profile Timeline **Relationships**

New Relationship

Cancel Save

George Bailey *is the...*

Husband

Mary Bailey *is the...*

Wife

Note

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

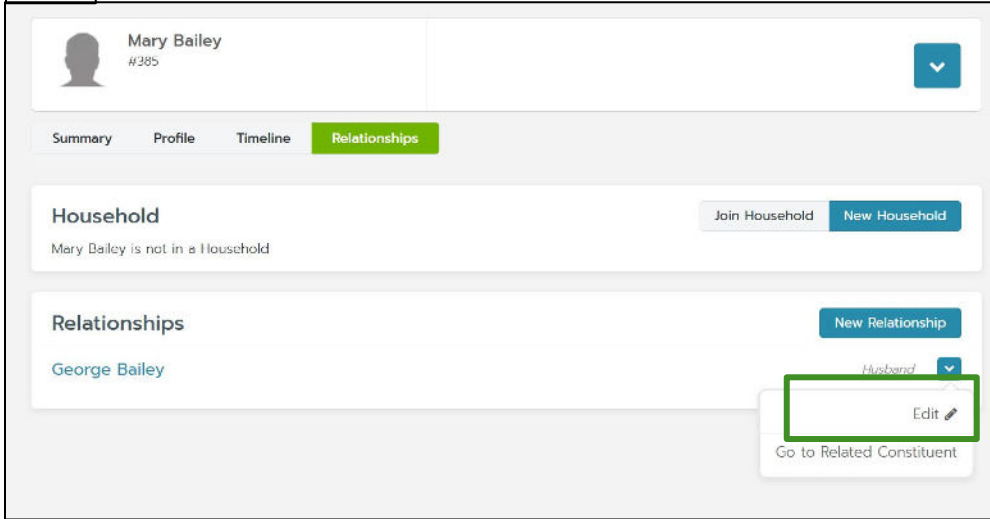
George Bailey

Husband



Edit or remove a relationship

1.



Mary Bailey
#385

Summary Profile Timeline **Relationships**

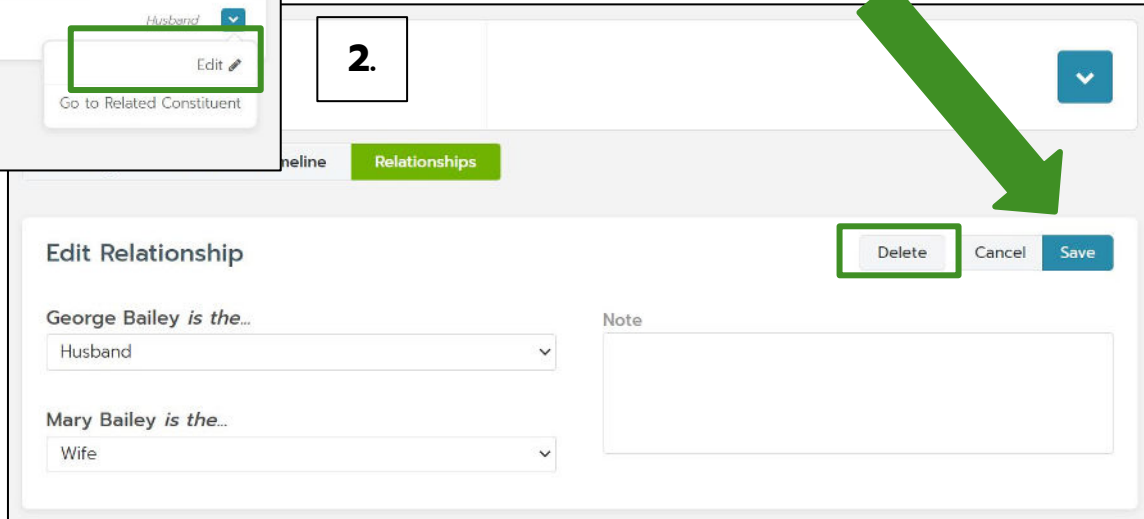
Household Join Household New Household
Mary Bailey is not in a Household

Relationships New Relationship

George Bailey Husband Edit Go to Related Constituent

Don't forget to click save!

2.



Timeline **Relationships**

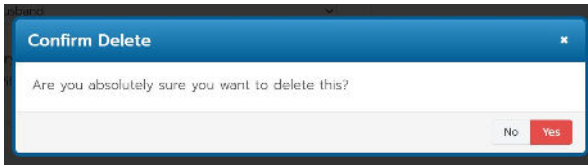
Edit Relationship Delete Cancel Save

George Bailey *is the...*
Husband

Mary Bailey *is the...*
Wife

Note

3.



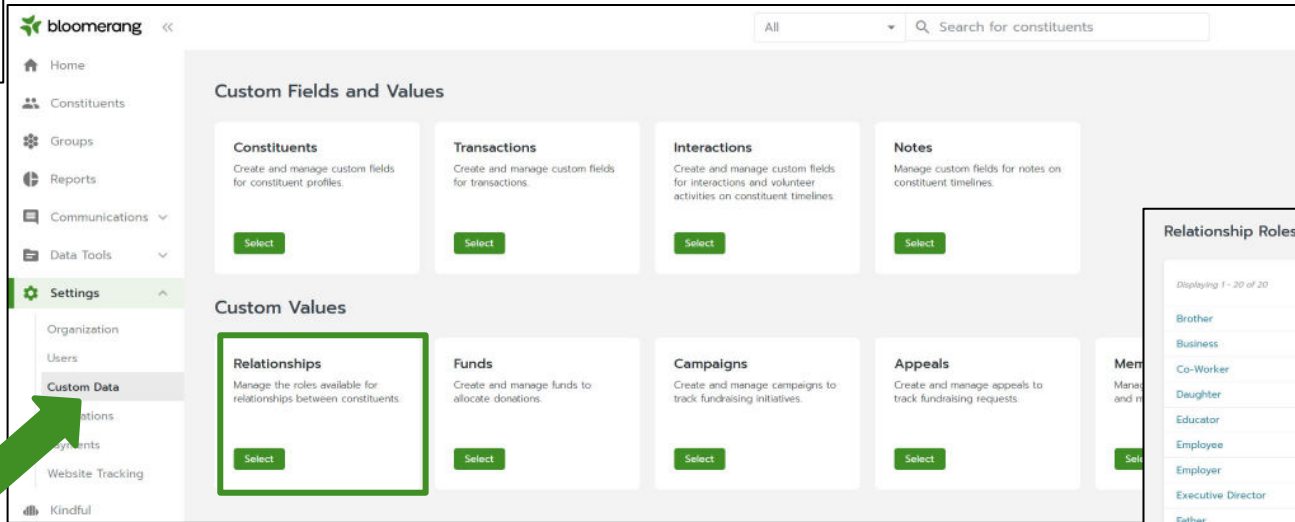
Confirm Delete

Are you absolutely sure you want to delete this?

No Yes

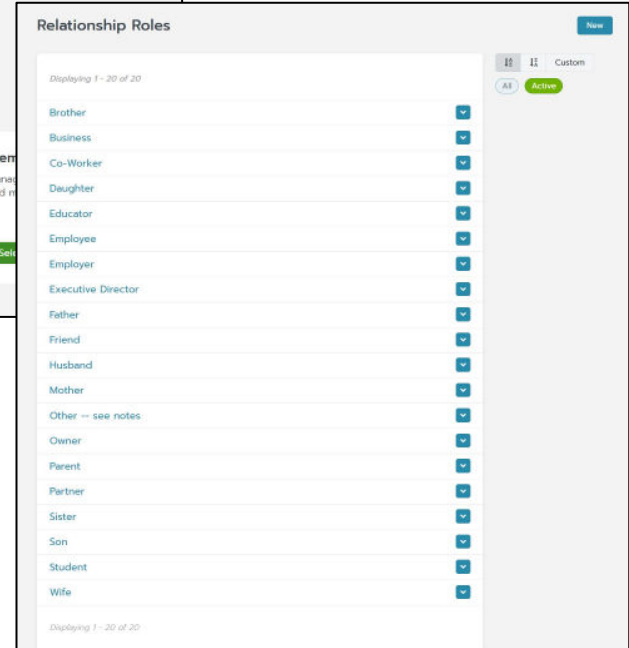
Edit relationship roles

1.



The screenshot shows the Bloomerang settings interface. On the left is a navigation sidebar with the following items: Home, Constituents, Groups, Reports, Communications, Data Tools, Settings (expanded), Organization, Users, Custom Data (highlighted with a green arrow), Campaigns, Website Tracking, and Kindful. The main content area is titled 'Custom Fields and Values' and contains two sections: 'Custom Fields and Values' and 'Custom Values'. The 'Custom Values' section has a green box around the 'Relationships' card, which is described as 'Manage the roles available for relationships between constituents' and has a 'Select' button. Other cards in this section include Constituents, Transactions, Interactions, Notes, Funds, Campaigns, and Appeals, each with a 'Select' button.

2.



The screenshot shows the 'Relationship Roles' configuration page. It features a list of relationship roles, each with a dropdown arrow on the right side. The roles listed are: Brother, Business, Co-Worker, Daughter, Educator, Employee, Employer, Executive Director, Father, Friend, Husband, Mother, Other -- see notes, Owner, Parent, Partner, Sister, Son, Student, and Wife. At the top right, there is a 'New' button and a status indicator showing 'All' and 'Active'. At the bottom, it says 'Displaying 1 - 20 of 20'.

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

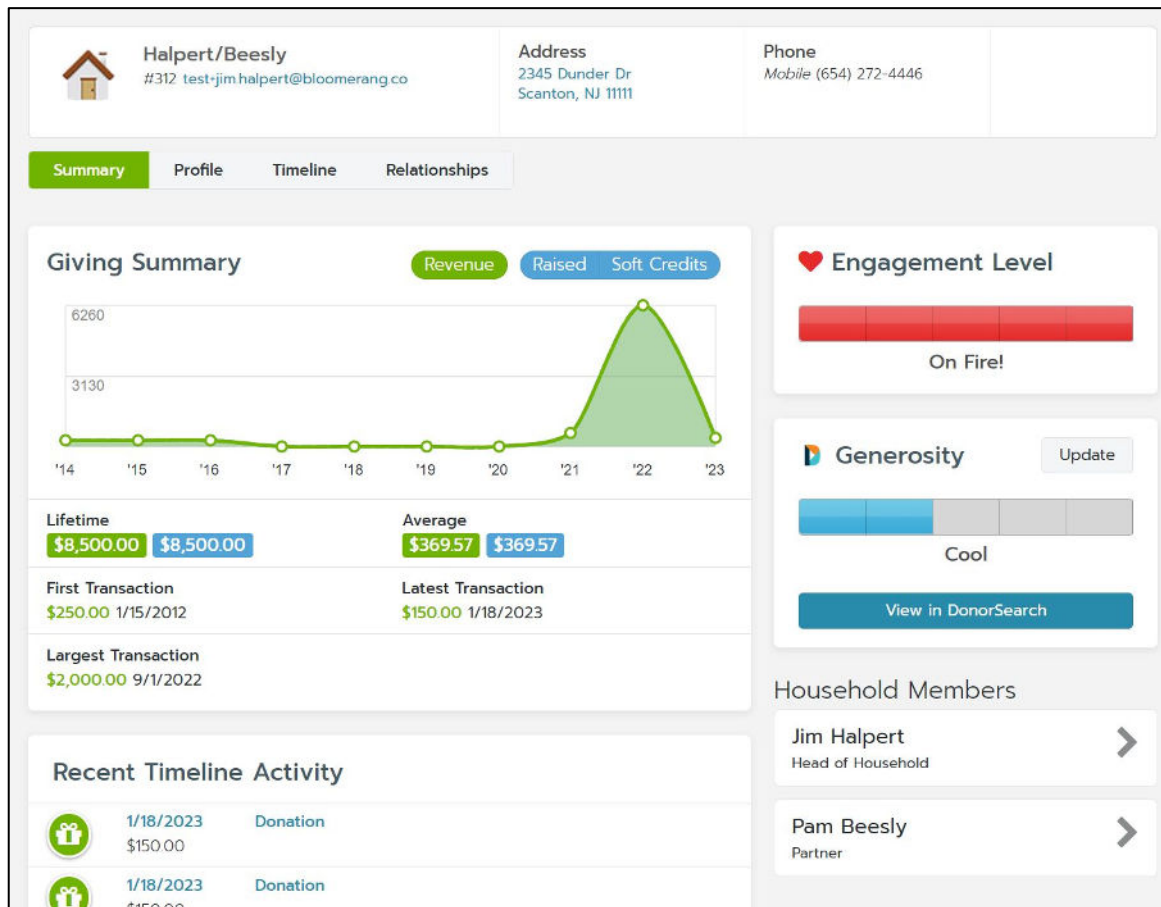
	Halpert/Beesly #312 test+jim.halpert@bloomerang.co	Address 2345 Dunder Dr Scanton, NJ 11111	Phone <i>Mobile (654) 272-4446</i>	
---	--	---	--	--

- 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.
- **Head of Household** should be the member who has the strongest relationship with your organization and has contact information in the system.

Household profiles components

Summary

- Shows all combined data from all members of the household.
- **Household Members** area is linked to individual constituent profiles.



The screenshot displays the 'Summary' tab of a household profile for Halpert/Beesly. The header includes contact information: a house icon, name 'Halpert/Beesly', email '#312 test-jim.halpert@bloomerang.co', address '2345 Dunder Dr, Scanton, NJ 11111', and phone 'Mobile (654) 272-4446'. Below the header are tabs for 'Summary', 'Profile', 'Timeline', and 'Relationships'. The main content area features a 'Giving Summary' chart showing revenue from 2014 to 2023, with a significant peak in 2022. Below the chart are summary statistics for Lifetime, Average, First Transaction, Latest Transaction, and Largest Transaction. To the right, there are three engagement metrics: 'Engagement Level' (On Fire!), 'Generosity' (Cool), and 'View in DonorSearch'. At the bottom, the 'Recent Timeline Activity' shows two donation transactions on 1/18/2023.

Category	Value
Lifetime	\$8,500.00
Average	\$369.57
First Transaction	\$250.00 1/15/2012
Latest Transaction	\$150.00 1/18/2023
Largest Transaction	\$2,000.00 9/1/2022

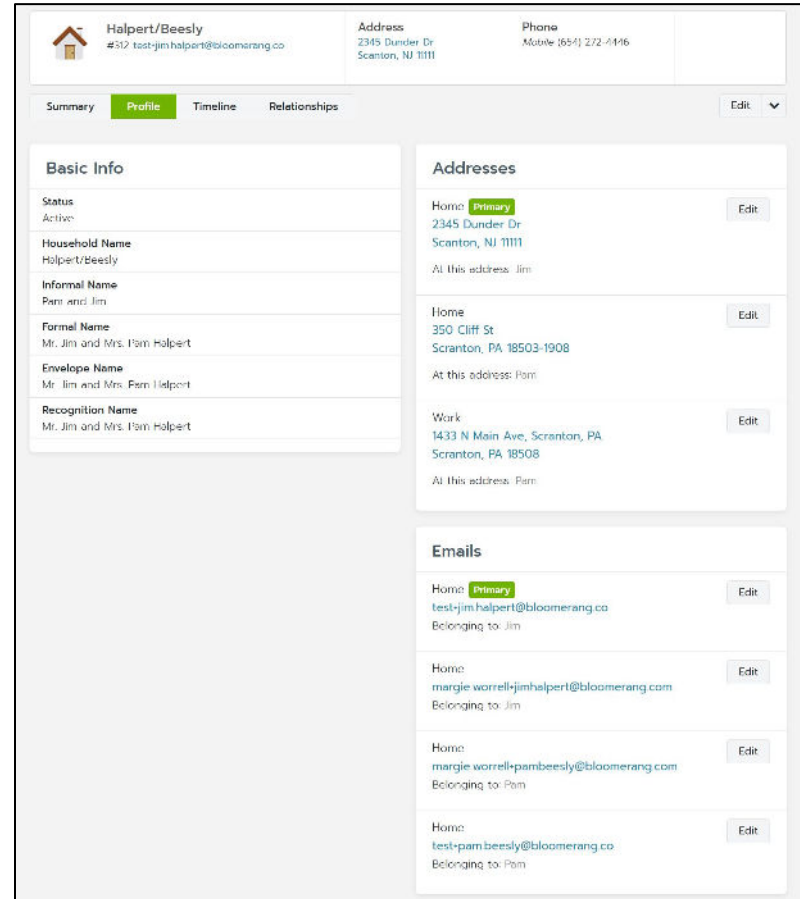
Member Name	Role
Jim Halpert	Head of Household
Pam Beesly	Partner

Date	Amount	Type
1/18/2023	\$150.00	Donation
1/18/2023	\$150.00	Donation

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 Bloomerang interface for a household profile. At the top, the household name "Halpert/Beesly" is shown with a house icon and a unique ID "#512 test-jim.halpert@bloomerang.co". To the right, contact information is listed: "Address: 2345 Dunder Dr, Scanton, NJ 11111" and "Phone: Mobile (654) 272-4146". Below this is a navigation bar with tabs for "Summary", "Profile" (which is selected and highlighted in green), "Timeline", and "Relationships". An "Edit" button with a dropdown arrow is located on the right side of the navigation bar.

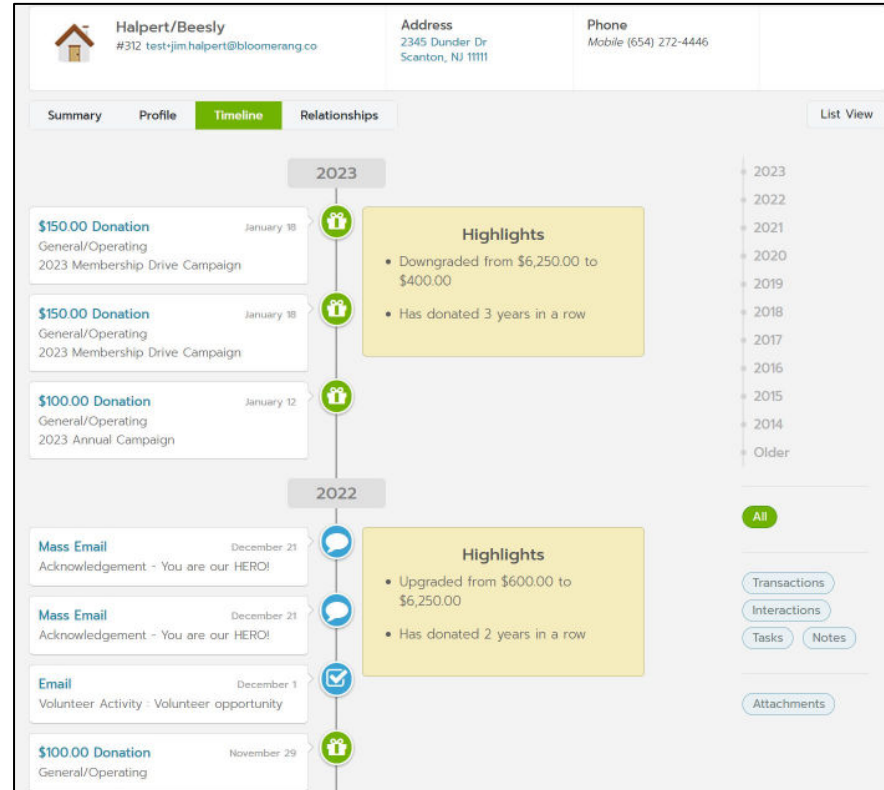
The main content area is divided into three sections:

- Basic Info:** A list of fields for household information:
 - 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:** A list of addresses with "Home" as the primary address:
 - Home (Primary):** 2345 Dunder Dr, Scanton, NJ 11111. Includes "At this address: Jim" and an "Edit" button.
 - Home:** 350 Cliff St, Scanton, PA 18503-1908. Includes "At this address: Pam" and an "Edit" button.
 - Work:** 1433 N Main Ave., Scanton, PA 18508. Includes "At this address: Pam" and an "Edit" button.
- Emails:** A list of email addresses:
 - Home (Primary):** test-jim.halpert@bloomerang.co. Includes "Belonging to: Jim" and an "Edit" button.
 - Home:** margie.worrelljimhalpert@bloomerang.com. Includes "Belonging to: Jim" and an "Edit" button.
 - Home:** margie.worrell-pambeesly@bloomerang.com. Includes "Belonging to: Pam" and an "Edit" button.
 - Home:** test-pam.beesly@bloomerang.co. Includes "Belonging to: Pam" and an "Edit" button.

Household profiles components

Timeline

- Combined entries from **ALL** members of the household.
- When you click into the interaction it will show the member that engaged in the activity.



The screenshot displays the Bloomerang interface for a household profile. At the top, the household name is "Halpert/Beesly" with contact information: #312 test-jim.halpert@bloomerang.co, Address: 2345 Dunder Dr, Scanton, NJ 11111, and Phone: Mobile (654) 272-4446. Below this, there are tabs for "Summary", "Profile", "Timeline" (which is selected), and "Relationships". A "List View" button is also present.

The timeline is organized by year, with 2023 and 2022 visible. For 2023, there are three donation entries:

- \$150.00 Donation** (January 18): General/Operating, 2023 Membership Drive Campaign.
- \$150.00 Donation** (January 18): General/Operating, 2023 Membership Drive Campaign.
- \$100.00 Donation** (January 12): General/Operating, 2023 Annual Campaign.

For 2022, there are four entries:

- 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.

Yellow highlight boxes are present for each year, containing the following information:

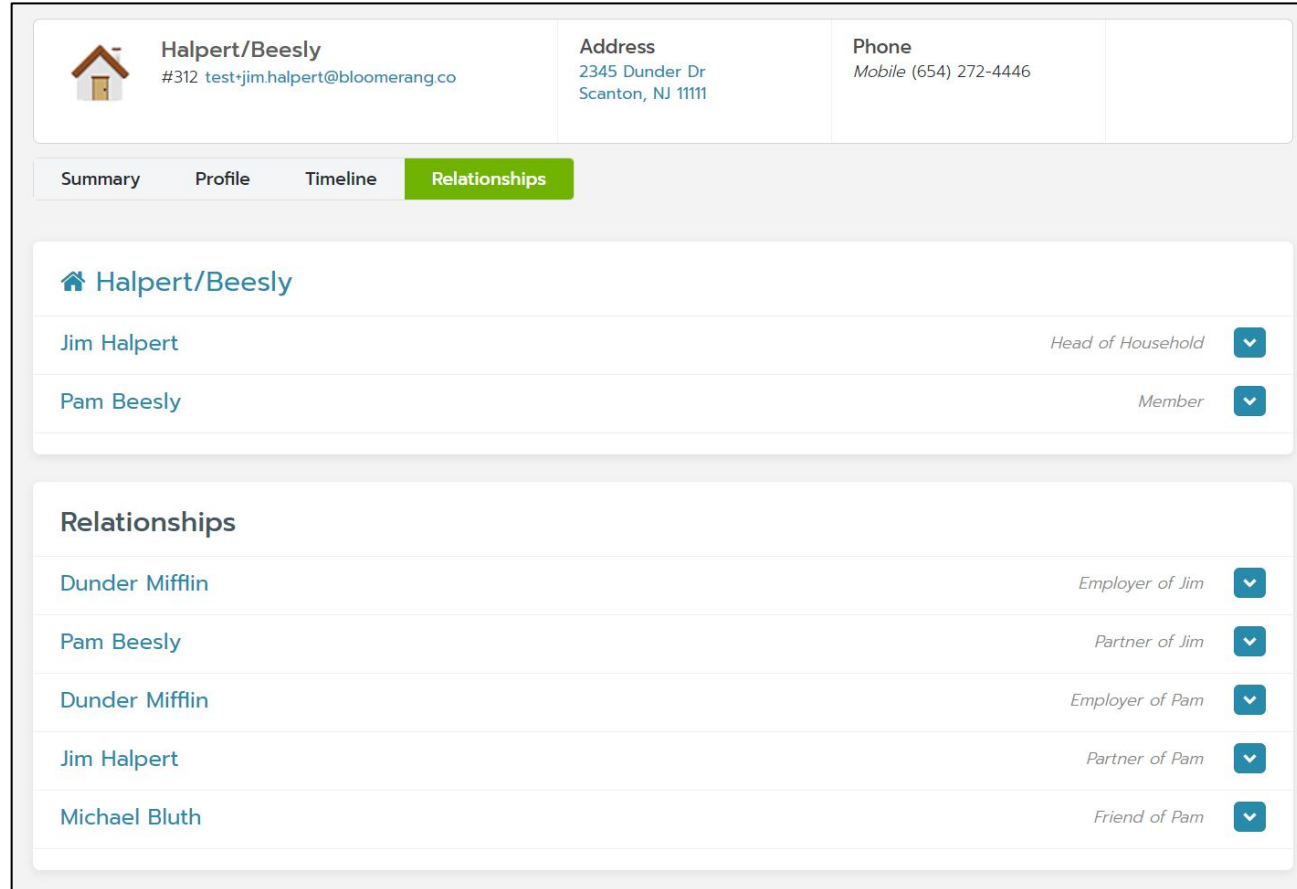
- 2023 Highlights:**
 - Downgraded from \$6,250.00 to \$400.00
 - Has donated 3 years in a row
- 2022 Highlights:**
 - Upgraded from \$600.00 to \$6,250.00
 - Has donated 2 years in a row

On the right side of the timeline, there is a vertical scroll bar with years from 2023 down to "Older". Below the scroll bar are several filter buttons: "All" (selected), "Transactions", "Interactions", "Tasks", "Notes", and "Attachments".

Household profiles components

Relationships

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



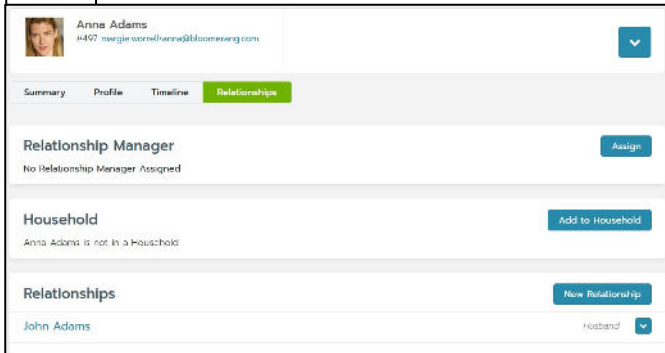
The screenshot displays a user interface for a household profile. At the top, there is a header section with a house icon, the name 'Halpert/Beesly', and the email address '#312 test+jim.halpert@bloomerang.co'. To the right, there are fields for 'Address' (2345 Dunder Dr, Scanton, NJ 11111) and 'Phone' (Mobile (654) 272-4446). Below the header is a navigation bar with tabs for 'Summary', 'Profile', 'Timeline', and 'Relationships', with 'Relationships' being the active tab. The main content area is divided into two sections. The first section, titled 'Halpert/Beesly', lists household members: 'Jim Halpert' (Head of Household) and 'Pam Beesly' (Member). The second section, titled 'Relationships', lists external relationships: 'Dunder Mifflin' (Employer of Jim), 'Pam Beesly' (Partner of Jim), 'Dunder Mifflin' (Employer of Pam), 'Jim Halpert' (Partner of Pam), and 'Michael Bluth' (Friend of Pam). Each relationship entry includes a dropdown arrow for further options.

Relationship	Role
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 Add to Household and then Create 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.



Anna Adams
#497_margie.worrell@anna@bloomerang.com

Summary Profile Timeline **Relationships**

Relationship Manager Assign
No Relationship Manager Assigned

Household Add to Household
Anna Adams is not in a Household

Relationships New Relationship
John Adams Husband

2.



Add to Household

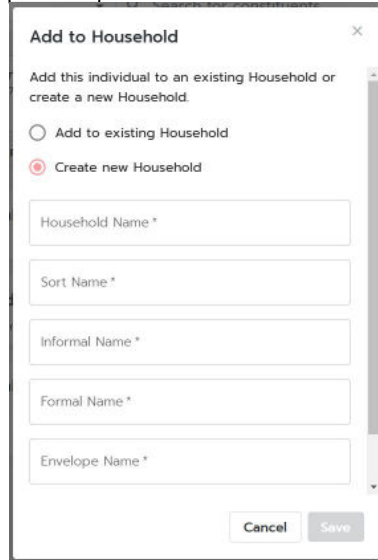
Add this individual to an existing Household or create a new Household.

Add to existing Household

Create new Household

Cancel Save

3.



Add to Household

Add this individual to an existing Household or create a new Household.

Add to existing Household

Create new Household

Household Name *

Sort Name *

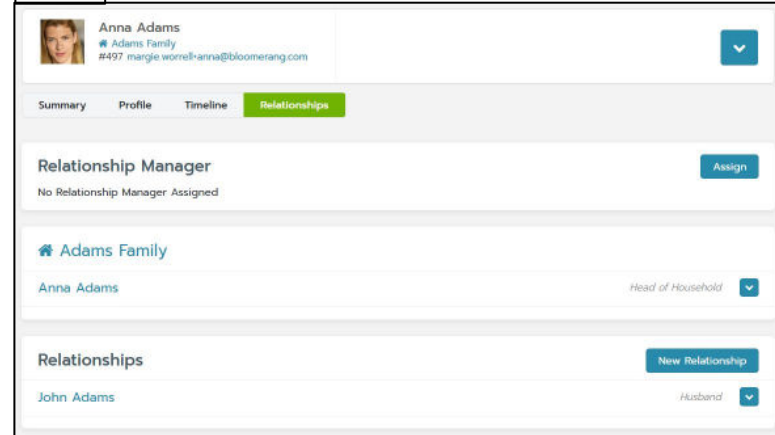
Informal Name *

Formal Name *

Envelope Name *

Cancel Save

4.



Anna Adams
Adams Family
#497_margie.worrell@anna@bloomerang.com

Summary Profile Timeline **Relationships**

Relationship Manager Assign
No Relationship Manager Assigned

Adams Family

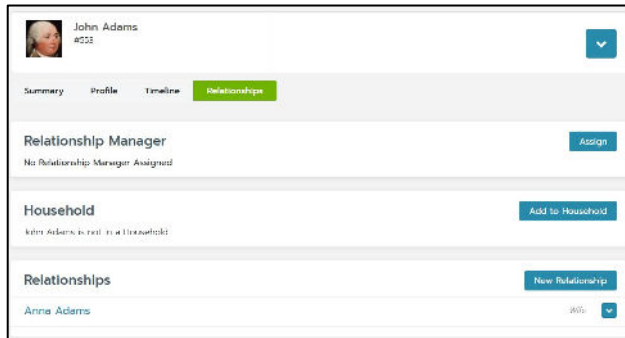
Anna Adams *Head of Household*

Relationships New Relationship
John Adams Husband

Adding a new Household member

- Search for member to add
- Click on Relationships tab
- Click Add to existing Household
- Search for Household name
- Click on Household and Save
- New member is created

1.



John Adams #553

Summary Profile Timeline Relationships

Relationship Manager [Assign](#)

No Relationship Manager Assigned

Household [Add to Household](#)

John Adams is not in a Household

Relationships [New Relationship](#)

Anna Adams #553

2.



Add to Household

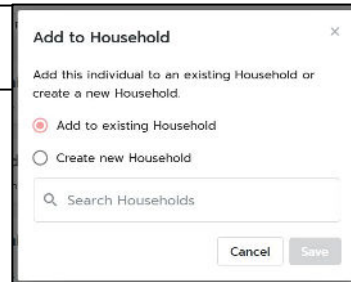
Add this individual to an existing Household or create a new Household.

Add to existing Household

Create new Household

[Cancel](#) [Save](#)

3.



Add to Household

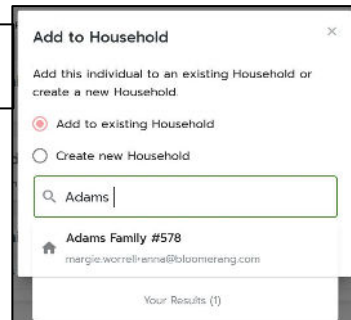
Add this individual to an existing Household or create a new Household.

Add to existing Household

Create new Household

[Cancel](#) [Save](#)

4.



Add to Household

Add this individual to an existing Household or create a new Household.

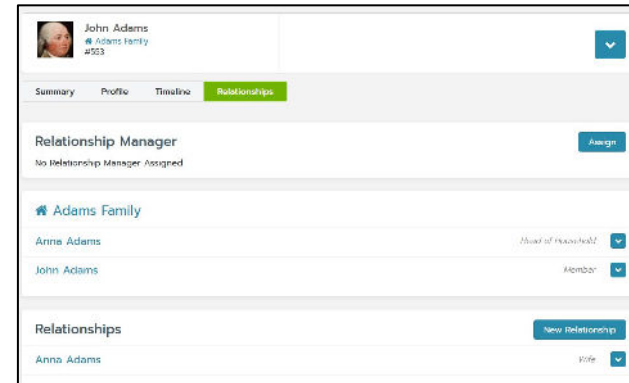
Add to existing Household

Create new Household

[Adams Family #578](#)
margie.worrell-anna@bloomerang.com

Your Results (1)

5.



John Adams Adams Family #553

Summary Profile Timeline Relationships

Relationship Manager [Assign](#)

No Relationship Manager Assigned

[Adams Family](#)

Anna Adams Head of Household

John Adams Member

Relationships [New Relationship](#)


Anna Adams Wife

Head of the Household

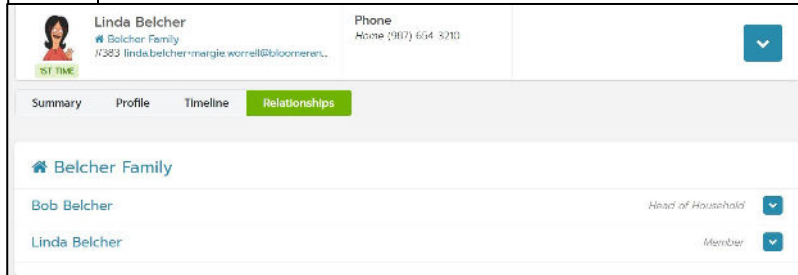
Simply means that this is the info to be used when communicating with all members.

- 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 profile of Linda Belcher. At the top, there is a header with her name, a profile picture, and contact information including a phone number and an email address. Below this is a navigation bar with tabs for Summary, Profile, Timeline, and Relationships, with Relationships being the active tab. Underneath, there is a section titled "Belcher Family" which lists household members: Bob Belcher (Head of Household) and Linda Belcher (Member). Each name has a small blue dropdown arrow next to it.


2.



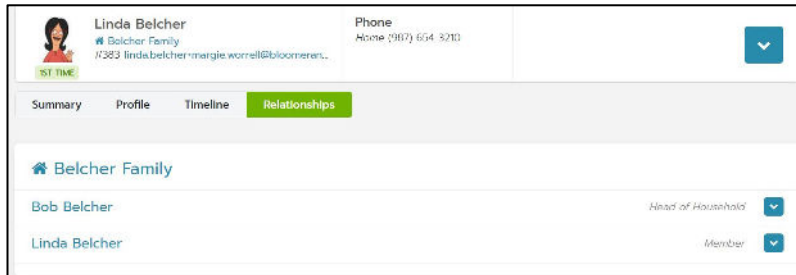
The screenshot shows a dropdown menu with three options: "Edit" with a pencil icon, "Make Head of Household" with a magnifying glass icon, and "Leave Household" with an 'X' icon.

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, contact information, and a dropdown arrow. Below this is a navigation bar with tabs for Summary, Profile, Timeline, and Relationships. The Relationships tab is active. Underneath, there is a section for the household, 'Belcher Family', with a list of members. Bob Belcher is listed as the 'Head of Household' and Linda Belcher is listed as a 'Member'. Each name has a dropdown arrow next to it.

2.

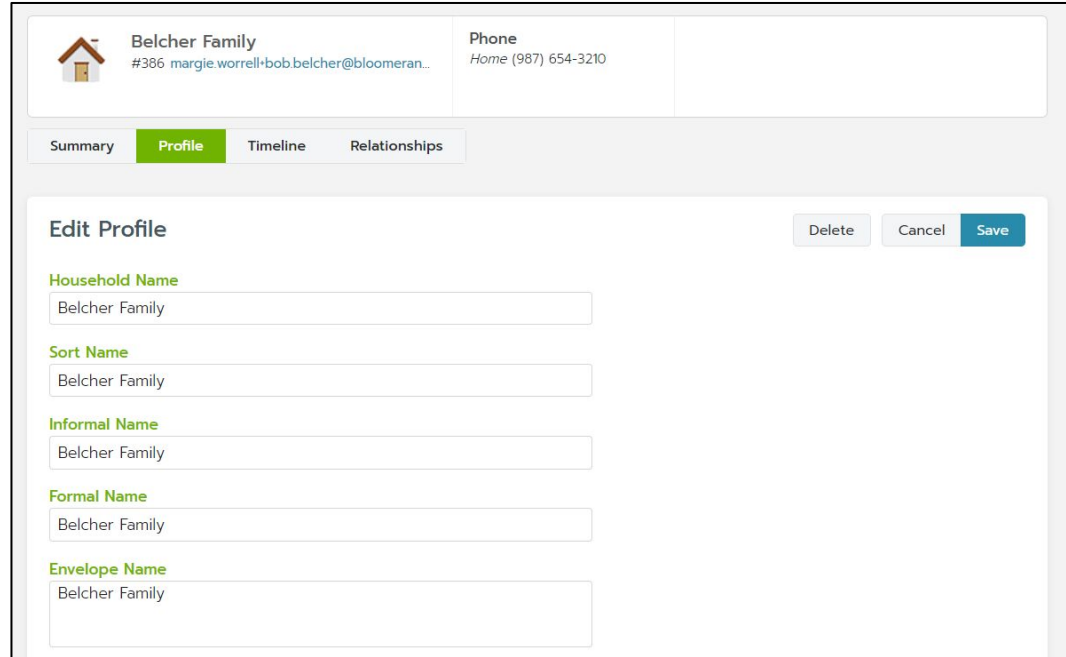


The screenshot shows a menu with three options: 'Edit' with a pencil icon, 'Make Head of Household' with a key icon, and 'Leave Household' with an 'X' icon.

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.



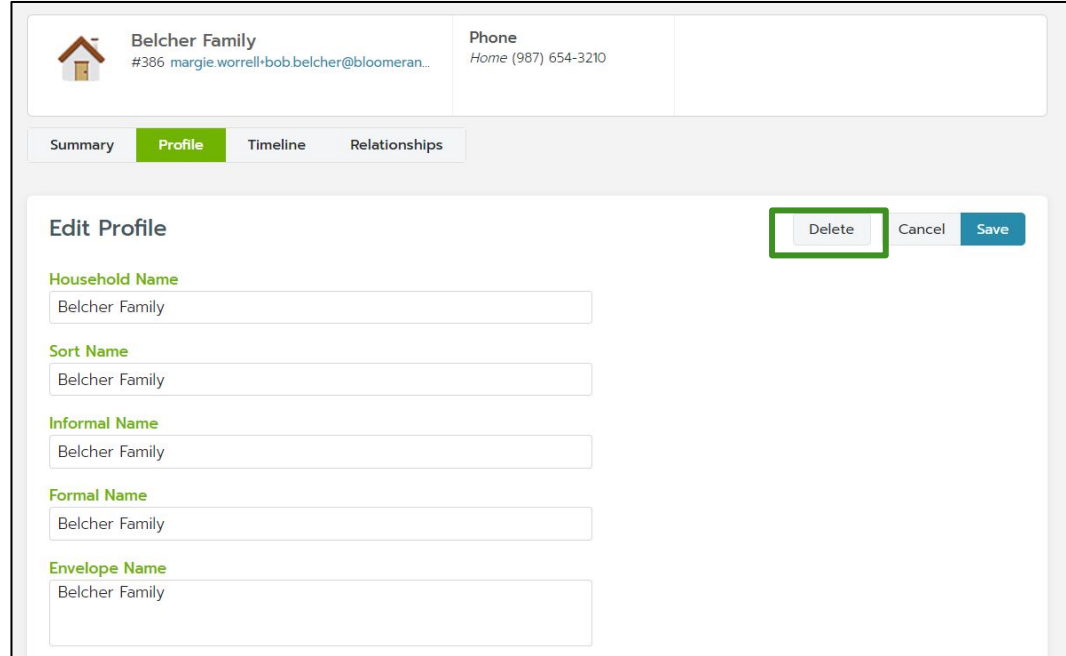
The screenshot displays the Bloomerang interface for editing household profile data. At the top, a header bar shows a house icon, the household name 'Belcher Family', an email address '#386 margie.worrell+bob.belcher@bloomeran...', and a phone number 'Home (987) 654-3210'. Below this is a navigation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

Relationship Managers



Adding a Relationship Manager to an account



- Search for the constituent account (can be organization or individual)
- On constituent's account, select Relationships
- Click on Assign next to Relationship Manager
- Choose the manager from your list and click Assign
- You will see the Relationship Manager displayed in the tile and above in the header

1.

Acme Corporation
#192_bugs.bunny@margie.worrell@bloomerang...
Address: 571-4949 Montes, St. Downey, NJ 12358
Phone: Mobile (199) 647-2779

Summary Profile Timeline **Relationships**

Relationship Manager Assign
No Relationship Manager Assigned

Household Add to Household
Acme Corporation is not in a Household

Relationships New Relationship
Charles Barkley Employee
Richard Belding Employee

2.

Assign a Relationship Manager

Select a user from your organization to be assigned as Relationship Manager to this constituent.

Assign to *

- Amy Bell
- Board Member
- Diana Otero
- Evan Johnson
- margie.worrell**
- Volunteer Vera

3.

Acme Corporation
#192_bugs.bunny@margie.worrell@bloomerang...
Address: 571-4949 Montes, St. Downey, NJ 23558
Phone: Mobile (199) 647-2779

Summary Profile Timeline **Relationships**

Relationship Manager Remove Reassign
margie.worrell

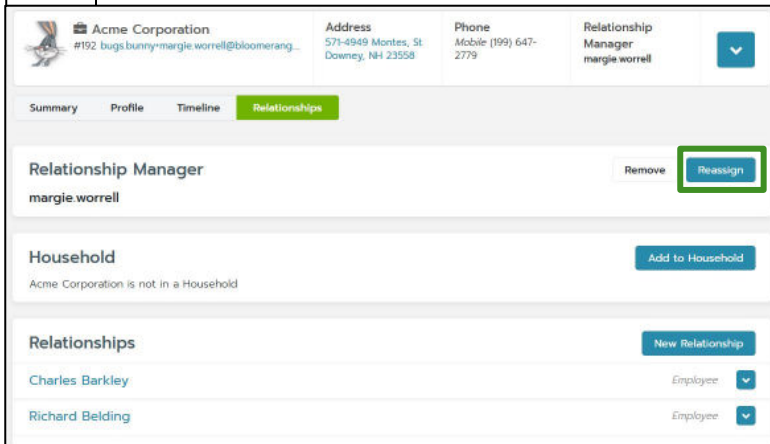
Household Add to Household
Acme Corporation is not in a Household

Relationships New Relationship
Charles Barkley Employee
Richard Belding Employee

Reassign a Relationship Manager to an account

- Search for the constituent account (can be organization or individual)
- On constituent's account, select Relationships
- Click on Reassign next to Relationship Manager
- Choose the new manager from your list and click Assign
- You will see the new Relationship Manager displayed in the tile and above in the header

1.



Acme Corporation
#192 bugs.bunny~margie.worrell@bloomerang...
Address 571-4949 Montes, St Downey, NH 23558
Phone Mobile (199) 647-2779
Relationship Manager margie.worrell

Summary Profile Timeline **Relationships**

Relationship Manager
margie.worrell [Remove] **Reassign**

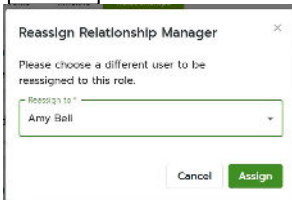
Household
Acme Corporation is not in a Household [Add to Household]

Relationships [New Relationship]

Charles Barkley Employee

Richard Belding Employee

2.



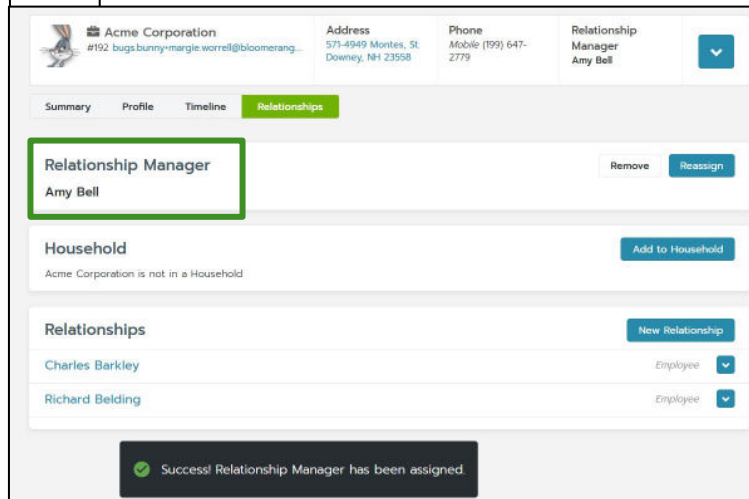
Reassign Relationship Manager

Please choose a different user to be reassigned to this role.

Relationships 192
Amy Bell

[Cancel] **Assign**

3.



Acme Corporation
#192 bugs.bunny~margie.worrell@bloomerang...
Address 571-4949 Montes, St Downey, NH 23558
Phone Mobile (199) 647-2779
Relationship Manager Amy Bell

Summary Profile Timeline **Relationships**

Relationship Manager
Amy Bell [Remove] **Reassign**

Household
Acme Corporation is not in a Household [Add to Household]

Relationships [New Relationship]

Charles Barkley Employee

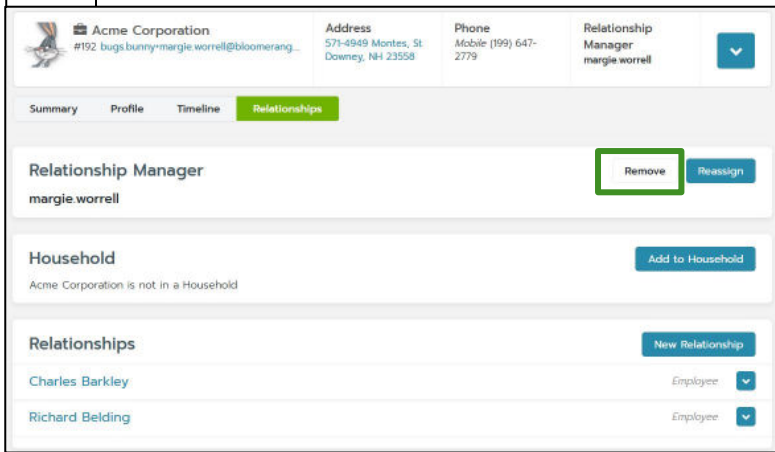
Richard Belding Employee

Success! Relationship Manager has been assigned.

Remove a Relationship Manager

- Search for the constituent account (can be organization or individual)
- On constituent's account, select Relationships
- Click on Reassign next to Relationship Manager
- Choose the new manager from your list and click Assign
- You will see the new Relationship Manager displayed in the tile and above in the header

1.



Acme Corporation
#192. bugs.bunny@margie.worrell@bloomerang...
Address: 571-4949 Montes, St. Downey, NH 23558
Phone: Mobile (199) 647-2779
Relationship Manager: margie worrell

Summary Profile Timeline **Relationships**

Relationship Manager
margie worrell [Remove] [Reassign]

Household
Acme Corporation is not in a Household [Add to Household]

Relationships [New Relationship]

Charles Barkley Employee [v]
Richard Belding Employee [v]

2.

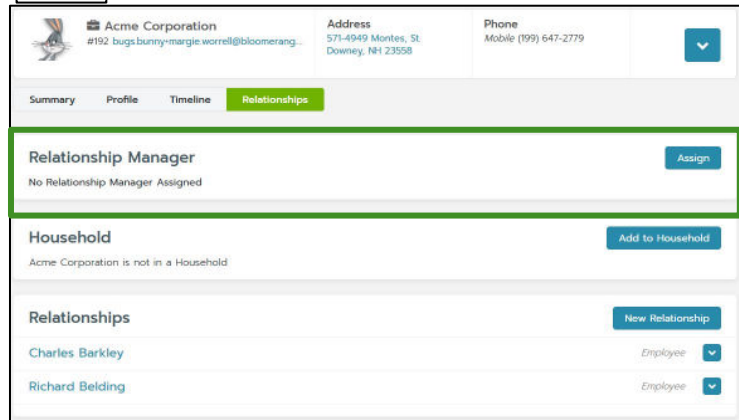


Remove Relationship Manager? ✕

This user will no longer be assigned as the Relationship Manager to this constituent.

[Cancel] [Confirm]

3.



Acme Corporation
#192. bugs.bunny@margie.worrell@bloomerang...
Address: 571-4949 Montes, St. Downey, NH 23558
Phone: Mobile (199) 647-2779

Summary Profile Timeline **Relationships**

Relationship Manager
No Relationship Manager Assigned [Assign]

Household
Acme Corporation is not in a Household [Add to Household]

Relationships [New Relationship]

Charles Barkley Employee [v]
Richard Belding Employee [v]

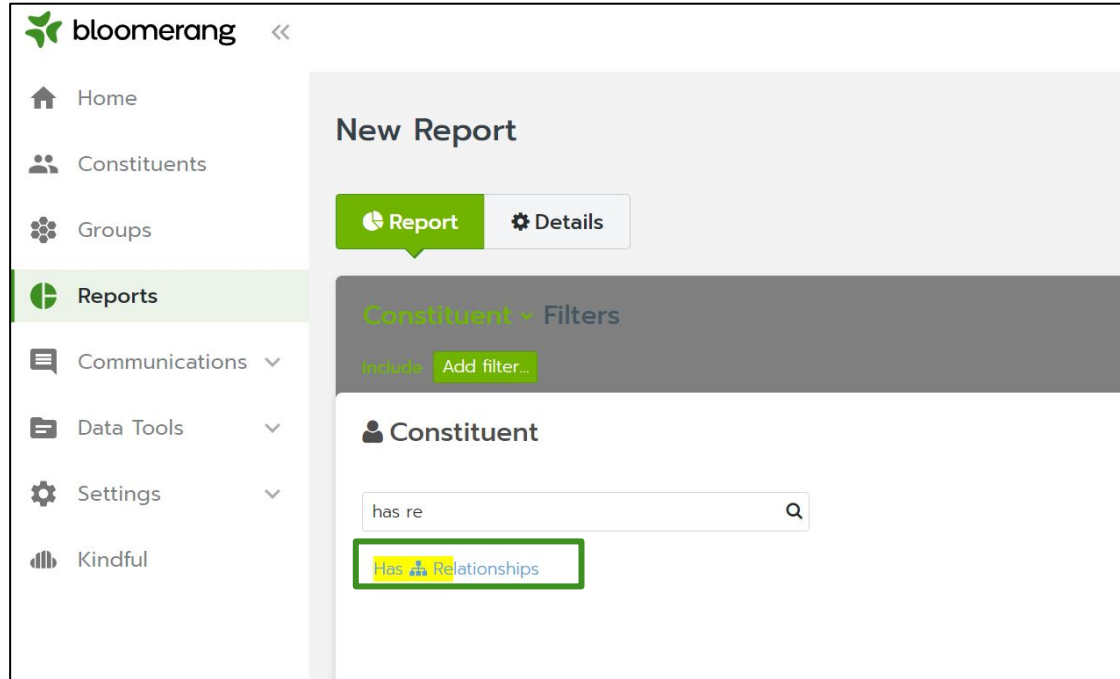
Reporting



Reporting on Relationships

Build a report about relationships to see how your constituents are connected. These reports can show you who can help you engage and cultivate a particular constituent. Of course, you can use these reports to send letters and emails.

Since relationships are all about people, relationship reports are based on constituents.



The screenshot displays the Bloomerang user interface for creating a new report. On the left, a navigation sidebar lists various features, with 'Reports' currently selected. The main content area is titled 'New Report' and features a prominent green 'Report' button. Below this, there are filter options for 'Constituent' and a search box. A button labeled 'Has Relationships' is highlighted with a green border, indicating the current selection.

“Has Relationships” Filter

New Report

Report Details

Constituent > Filters

include Add filter...

Constituent > Related Constituent

Has any Relationships

Has any Relationships

- Has any
- Has no
- Has at least
- Has at most

Has any Relationships

- Relationships
- Specific Relationships

Constituent > Related Constituent

Has any Specific Relationships

their role is

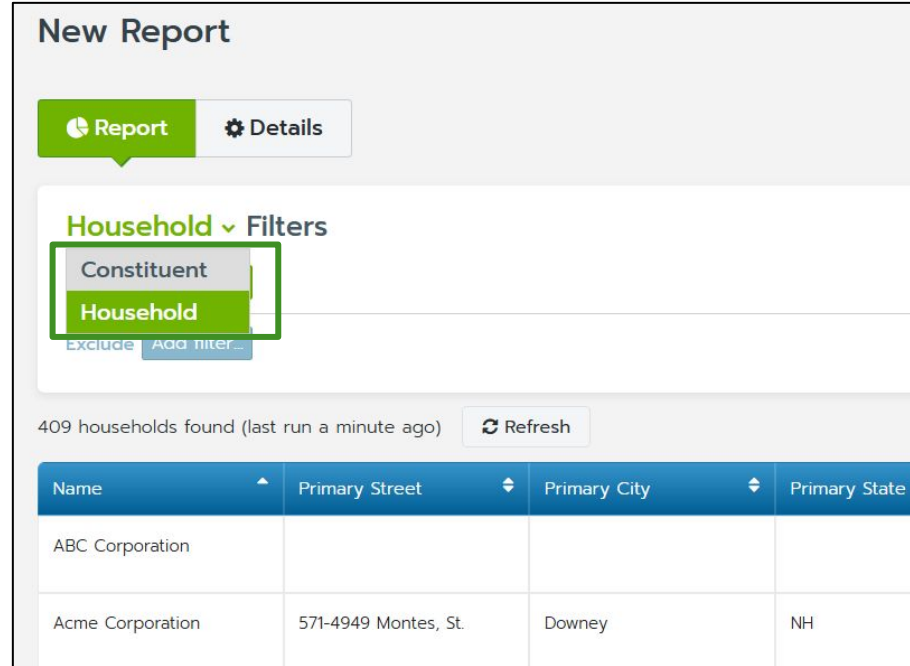
the other's role is

and the other constituent is anyone

Reporting on Households

You can run a report by Household or Constituent. When a report is run by Household:

- In a **constituent report**, household members are grouped together so that instead of listing each household member separately, their household is listed.
- In a **transaction, interaction, note, or task report**, Individuals who are in a household display the Household Name instead of the individual's names.
- ****Organizations and individuals not in a household are still listed.****



New Report

Report Details

Household Filters

Constituent Household

Exclude Add filter...

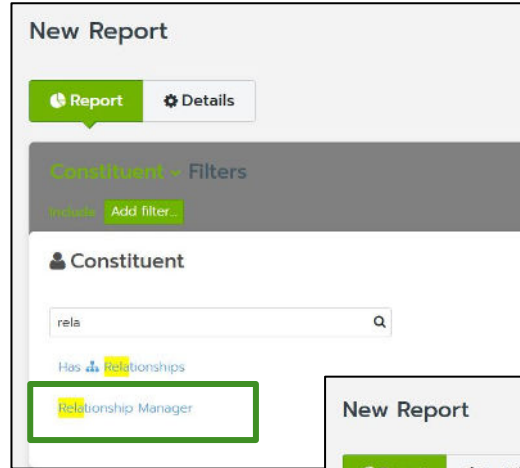
409 households found (last run a minute ago) Refresh

Name	Primary Street	Primary City	Primary State
ABC Corporation			
Acme Corporation	571-4949 Montes, St.	Downey	NH

Note: Running a report by household doesn't mean the report only lists households. The results will include households, individuals not in households, and organizations.

Reporting on Relationship Managers

- Use a **constituent report**, search for relationship manager in filters and click.
- Select the Relationship Manager from the list.
- You will see all constituents assigned to this Relationship Manager.



New Report

Report Details

Constituent - Filters

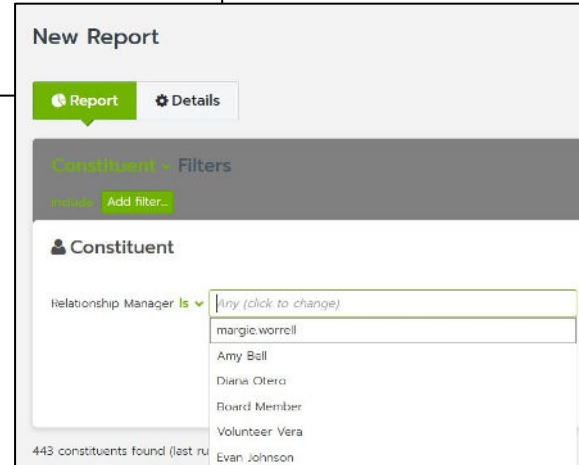
relate Add filter...

Constituent

rela

Has Relationships

Relationship Manager



New Report

Report Details

Constituent - Filters

relate Add filter...

Constituent

Relationship Manager is *[any (click to change)]*

margie.worrell

Amy Bell

Diana Otero

Board Member

Volunteer Vera

Evan Johnson

443 constituents found (last ru

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.

Q&A





Resources

[Relationships and Households](#)

[Report on Relationships](#)

[Add and Manage Relationships and Custom Relationship Roles](#)

[Create and Manage Households](#)

[About Relationship Managers](#)

[Run Relationship Manager Reports](#)

[Assign, View, Reassign, and Remove Relationship Managers](#)



Thanks for joining!

More tools and resources to help you grow.

Connect with us!
support@bloomerang.com

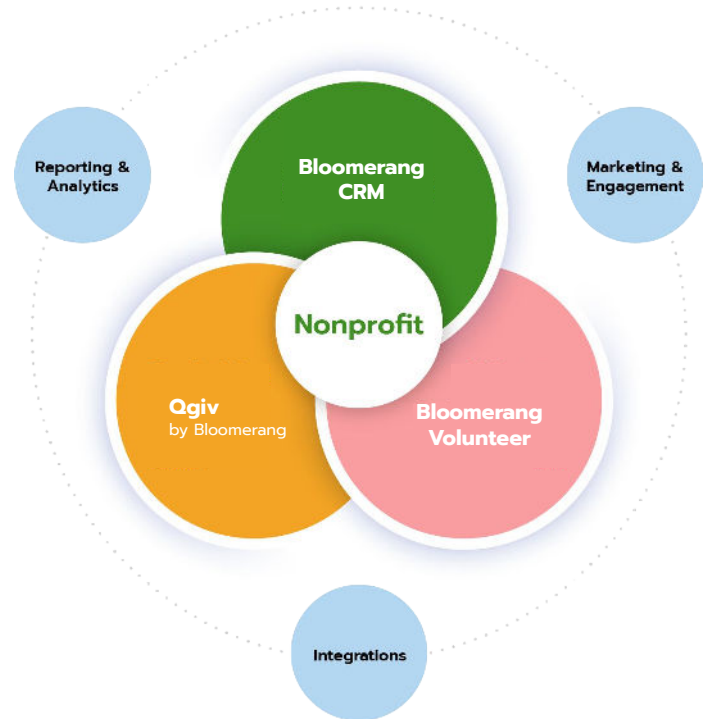
Request a demo
[Bloomerang.co/demo](https://bloomerang.co/demo)

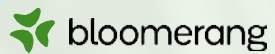
New! [Bloomerang Learning](#)
on-demand training

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.





Thank you!

