



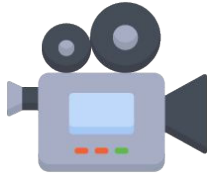
Database Set Up Basics

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.

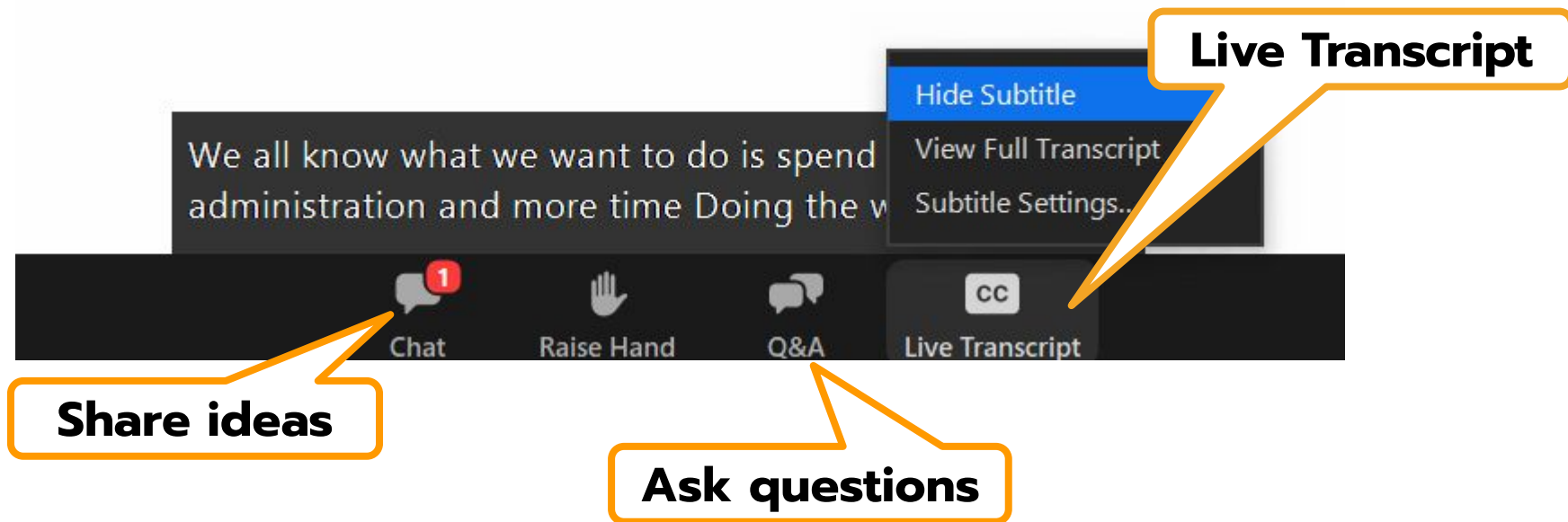


Feel free to ask questions! Use the Q&A option to ask questions and the chat option for general discussion. We'll answer questions at the end of the presentation.



Share your highlights and takeaways on your favorite social media channel and make sure to give us a follow!

Housekeeping



The image shows a video player interface with a dark background. At the top, there is a subtitle: "We all know what we want to do is spend administration and more time Doing the v". Below the subtitle is a control bar with four icons: a speech bubble with a red '1' (Chat), a hand (Raise Hand), two speech bubbles (Q&A), and a 'CC' icon (Live Transcript). A dropdown menu is open over the 'CC' icon, showing options: "Hide Subtitle", "View Full Transcript", and "Subtitle Settings..". Three orange callout boxes point to the interface: one to the Chat icon labeled "Share ideas", one to the Q&A icon labeled "Ask questions", and one to the Live Transcript icon labeled "Live Transcript".

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

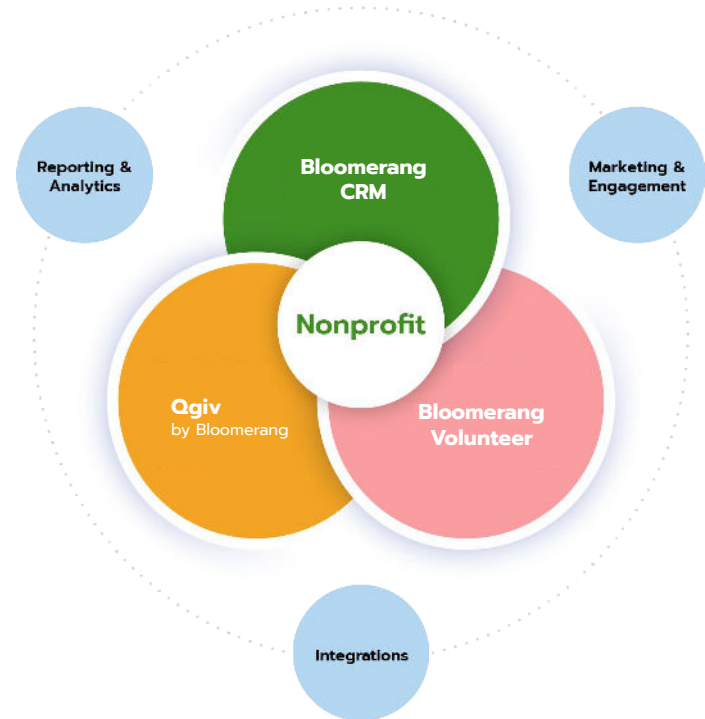
Industry leading
solutions

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.

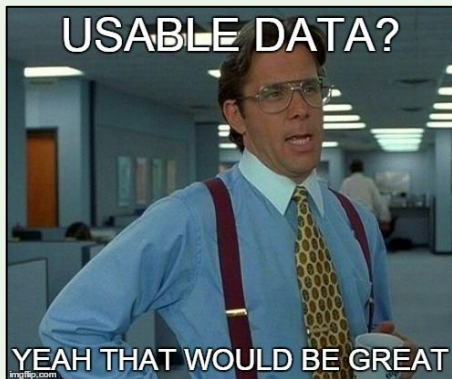
25%

Increase in recurring donor conversion rate.

26%

Increase in dollars raised year-over-year.

What will we cover today?



We will cover ways to make your database easier and more efficient to use!

1. **Why does healthy or clean data matter?**
2. **Start with Settings**
3. **Using Campaigns, Funds and Appeals effectively**
4. **Duplicates—avoiding and fixing them**
5. **List segmentation**
6. **Custom fields**
7. **Bulk Update and Bulk Delete**
8. **Q&A**

What do we mean by “healthy” or “clean” data?

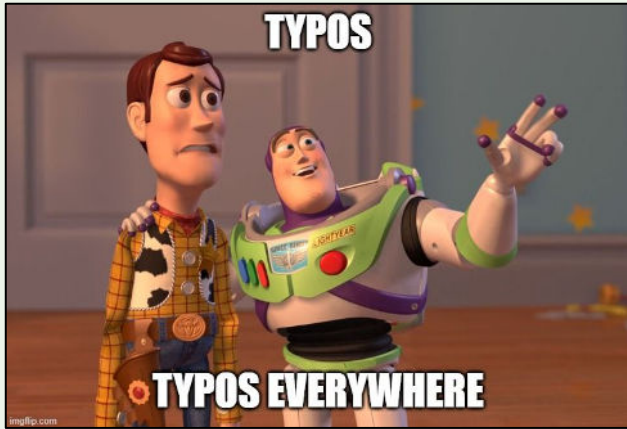


Clean and healthy data supports your objectives. It is:

- Easily discoverable
- Understandable
- Of value to your organization

It consistently holds to this criteria over time.

What does unhealthy data look like?



Examples of unhealthy data:

- Typos
- Duplicate records
- Non-standardized formats
- Missing data
- Outdated or inaccurate data

Why does clean and healthy data matter?



- Effectively target constituents in the most efficient way
- Ensure you have a single constituent view
- Avoid compliance issues
- Increase your overall ROI
- Reduce wasted budget spending

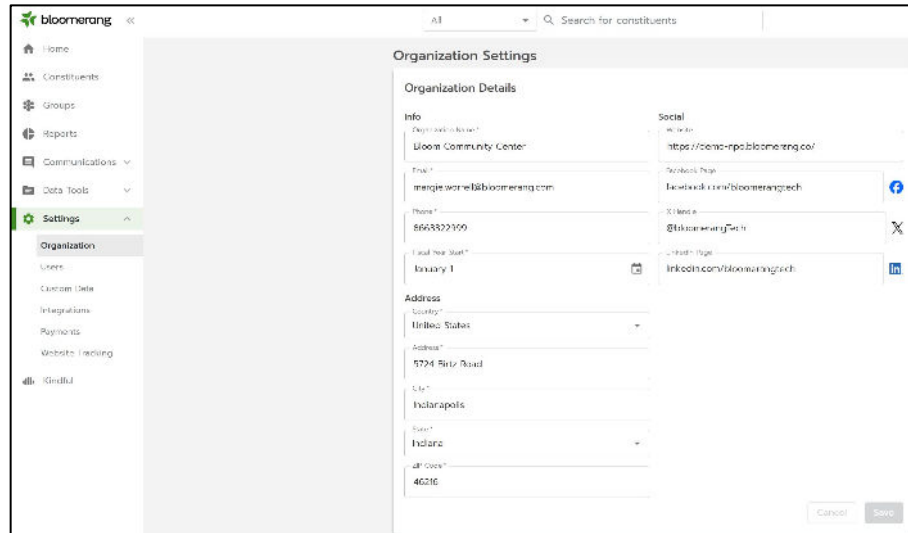
Large, vibrant green Monstera leaves with characteristic holes, positioned in the top-left corner of the slide.

Basics of Setting Up Your Bloomerang Donor Database

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

Settings (Admin function)--Org Details

Click Settings > Organization



The screenshot shows the 'Organization Settings' page in the bloomerang application. The left sidebar contains navigation options: Home, Constituents, Groups, Reports, Communications, Data Tools, Settings (highlighted), Organization (sub-menu), Users, Custom Data, Integrations, Payments, Website Tracking, and Global. The main content area is titled 'Organization Settings' and contains 'Organization Details' with the following fields:

Info	Social
Organization Name* Bloom Community Center	Website https://bloom-ncps.bloomerang.co/
Email* manager.women@bloomerang.com	Facebook Page facebook.com/bloomerangncps
Phone* 8663922199	TikTok @bloomerangncps
Fiscal Year Start* January 1	LinkedIn Page linkedin.com/bloomerangncps
Address	
Country* United States	
Address* 5724 River Road	
City* Indianapolis	
State* Indiana	
Zip Code* 46216	

Buttons for 'Cancel' and 'Save' are located at the bottom right of the form.

Update your organization details

- Add contact information for your organization
- Add your website and any social media information
- Set your Fiscal Year Start Date

Settings--Org Details

Click Settings > Organization

Giving Statement

Customize your organization's year-end giving statement with your organization logo, EIN, and a summary of soft credits and volunteer hours.

 Include soft credits and volunteer hours

Organization Logo

For best results, upload a square image file (JPG, PNG, JPEG) no larger than 10 MB.

Two-Factor Authentication

Two-Factor authentication is an enhanced security measure. When enabled, Bloomerang will send users an additional code to their authenticated email in order to log in and they will have to enter that code to log in.

 Turn On

Data Export

This will export .csv files for all your data.

Giving Statements

- Add your EIN (Employer Identification Number)
- Toggle to include Soft Credits/Volunteer Hours or not
- Add your logo if you wish

Set two-factor authentication for logins

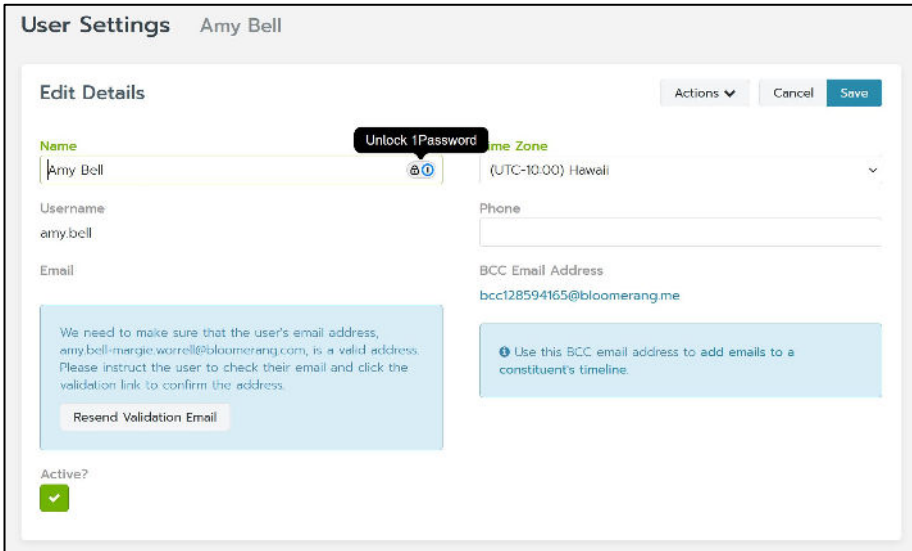
- Every user should have their own login ID/Password
- You can have as many as you need!

Data Export

- Back up your data or export to another system

Settings—Users in Bloomerang

Click Settings > Users



User Settings Amy Bell

Edit Details Actions Cancel Save

Name Amy Bell Unlock 1Password Time Zone (UTC-10:00) Hawaii

Username amy.bell Phone

Email BCC Email Address bcc128594165@bloomerang.me

We need to make sure that the user's email address, amy.bell-margie.worrell@bloomerang.com, is a valid address. Please instruct the user to check their email and click the validation link to confirm the address.

Resend Validation Email

Use this BCC email address to add emails to a constituent's timeline.

Active?

Creating Users in your Bloomerang System

- You can add, edit, deactivate or delete users
- You can set permission levels for users

PRO TIP: Set a policy for name/username. It helps keep your user set up easier!

Settings—User Permissions

Permissions

Select the user type.

Admin User

Standard User

Select whether this user can view and edit transactions.

View and edit all View only View and edit only transactions created by this user No access

Transaction Permissions

These settings apply to transaction-related data only. This allows you to protect sensitive data while still giving certain stakeholders access to your database.

Settings—User Permissions

Click Settings > Users

Permissions

Select the user type.

Admin User

Standard User

Select whether this user can view and edit transactions.

View and edit all View only View and edit only transactions created by this user No access

Select which areas this user can access.

Home

Reports

Data Tools

Communications

Emails

Letters

Select which information this user can edit. Clear the checkbox to grant view-only permission.

Constituents

Reports

Set permissions to protect your database health

You can select who has **access** to your database in these different areas:

- Home
- Reports
- Data Tools
- Communications
 - Emails
 - Letters

And who can **edit** in these areas:

- Constituents
- Reports

Settings—User Permissions

Click Settings > Users

Set up to have the system send an email when a task is assigned to them or updated.

Preferences

Task Notification Emails



Send an email when a task is assigned or updated.

A board member can record their interactions



Permissions

Select the user type.

Admin User

Standard User

Select whether this user can view and edit transactions.

View and edit all View only View and edit only transactions created by this user **No access**

Select which areas this user can access.

Home

Reports

Data Tools

Communications ⓘ

Emails

Letters

Select which information this user can edit. Clear the checkbox to grant view-only permission.

Constituents

Reports

An intern can update constituent profiles



Permissions

Select the user type.

Admin User

Standard User

Select whether this user can view and edit transactions.

View and edit all View only View and edit only transactions created by this user **No access**

Select which areas this user can access.

Home

Reports

Data Tools

Communications ⓘ

Emails

Letters

Select which information this user can edit. Clear the checkbox to grant view-only permission.

Constituents

Reports

A volunteer can enter gifts



Permissions

Select the user type.

Admin User

Standard User

Select whether this user can view and edit transactions.

View and edit all View only **View and edit only transactions created by this user** No access

Select which areas this user can access.

Home

Reports

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Communications ⓘ

Emails

Letters

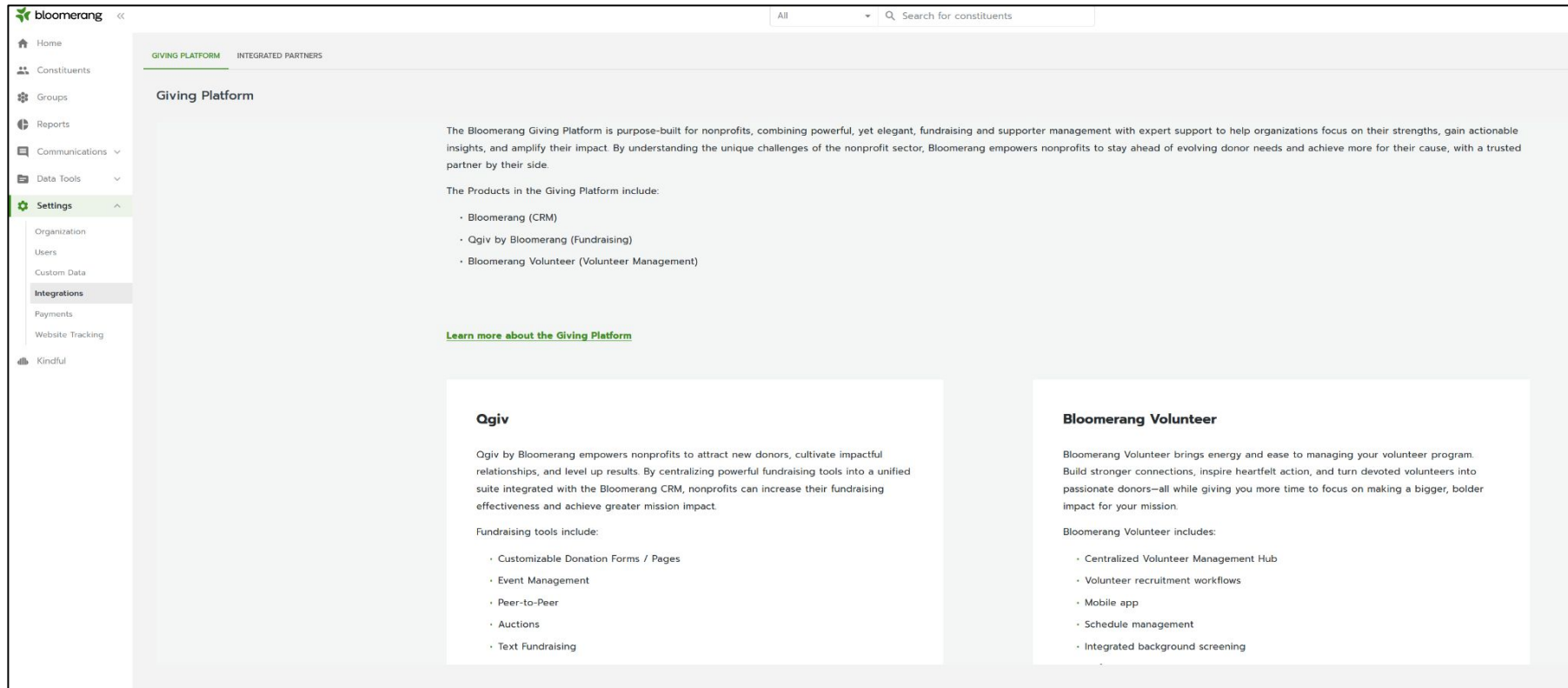
Select which information this user can edit. Clear the checkbox to grant view-only permission.

Constituents

Reports

Integrations

Click Settings > Integrations > New Landing Page



The screenshot shows the Bloomerang web interface. On the left is a navigation sidebar with the following items: Home, Constituents, Groups, Reports, Communications, Data Tools, Settings (highlighted), Organization, Users, Custom Data, Integrations (highlighted), Payments, Website Tracking, and Kindful. The main content area is titled "Giving Platform" under the "INTEGRATED PARTNERS" section. It contains a search bar at the top right with "All" and "Search for constituents". The main text describes the Bloomerang Giving Platform as purpose-built for nonprofits, combining fundraising and supporter management. It lists the products included: Bloomerang (CRM), Qgiv by Bloomerang (Fundraising), and Bloomerang Volunteer (Volunteer Management). There is a link to "Learn more about the Giving Platform". Below this are two detailed sections: "Qgiv" and "Bloomerang Volunteer".

Giving Platform

The Bloomerang Giving Platform is purpose-built for nonprofits, combining powerful, yet elegant, fundraising and supporter management with expert support to help organizations focus on their strengths, gain actionable insights, and amplify their impact. By understanding the unique challenges of the nonprofit sector, Bloomerang empowers nonprofits to stay ahead of evolving donor needs and achieve more for their cause, with a trusted partner by their side.

The Products in the Giving Platform include:

- Bloomerang (CRM)
- Qgiv by Bloomerang (Fundraising)
- Bloomerang Volunteer (Volunteer Management)

[Learn more about the Giving Platform](#)

Qgiv

Qgiv by Bloomerang empowers nonprofits to attract new donors, cultivate impactful relationships, and level up results. By centralizing powerful fundraising tools into a unified suite integrated with the Bloomerang CRM, nonprofits can increase their fundraising effectiveness and achieve greater mission impact.

Fundraising tools include:

- Customizable Donation Forms / Pages
- Event Management
- Peer-to-Peer
- Auctions
- Text Fundraising

Bloomerang Volunteer

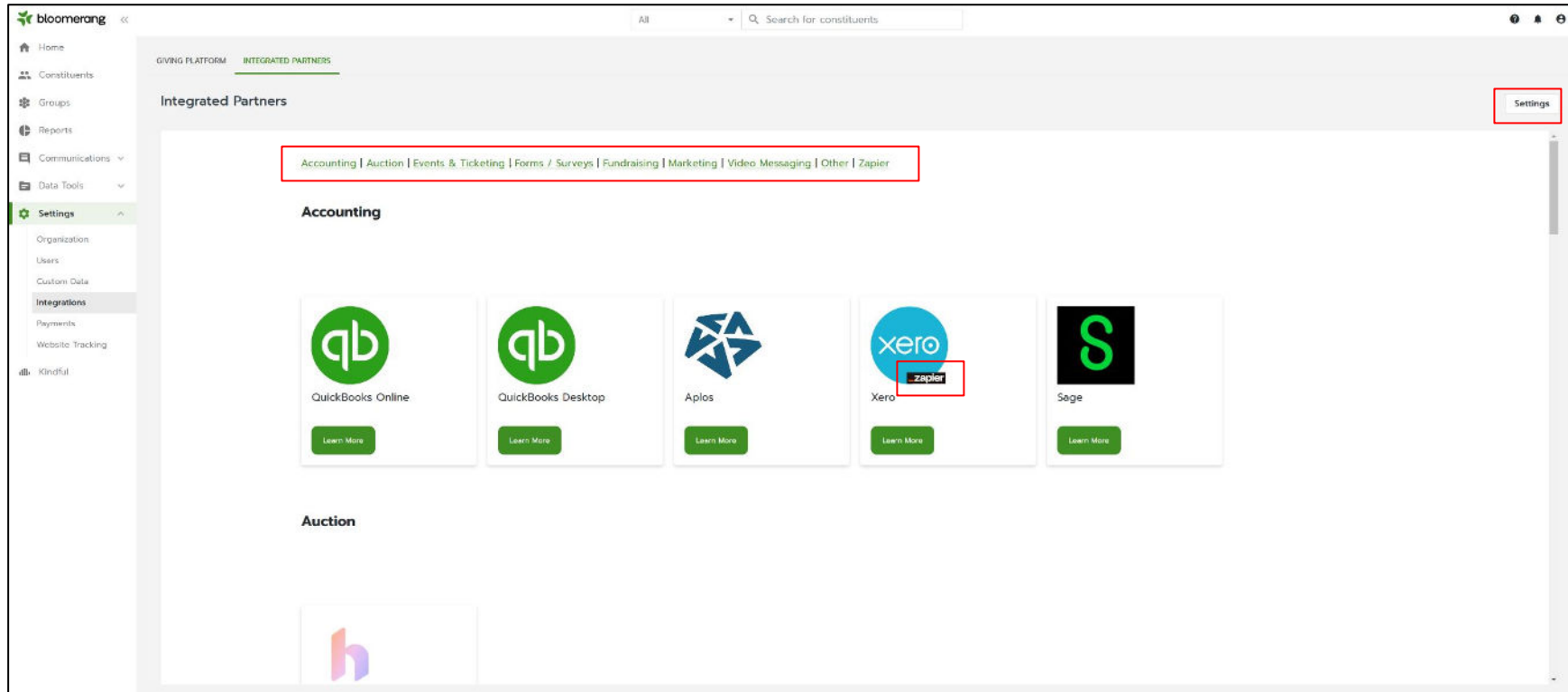
Bloomerang Volunteer brings energy and ease to managing your volunteer program. Build stronger connections, inspire heartfelt action, and turn devoted volunteers into passionate donors—all while giving you more time to focus on making a bigger, bolder impact for your mission.

Bloomerang Volunteer includes:

- Centralized Volunteer Management Hub
- Volunteer recruitment workflows
- Mobile app
- Schedule management
- Integrated background screening

Integrations

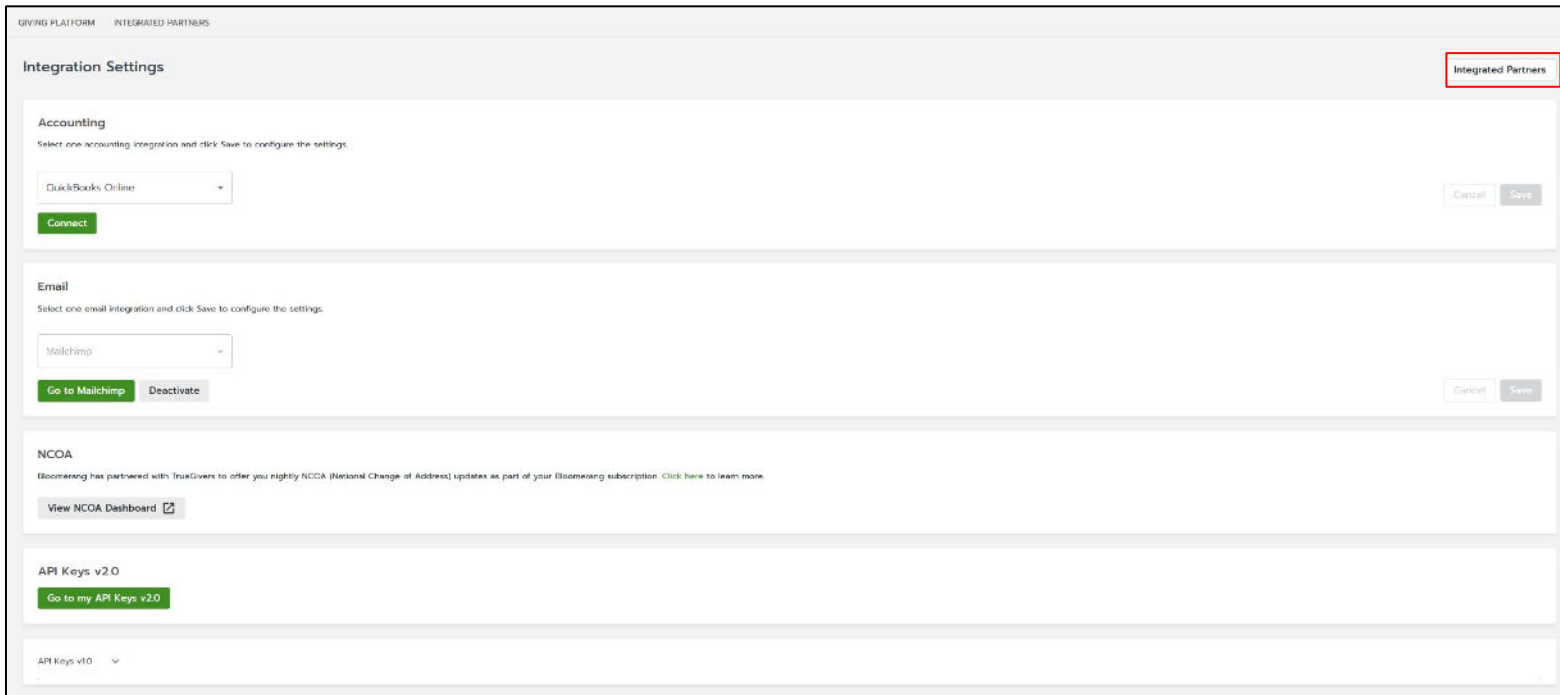
Click Settings > Integrations > Integrated Partners



The screenshot shows the Bloomerang web interface. On the left is a navigation sidebar with the following items: Home, Constituents, Groups, Reports, Communications, Data Tools, Settings (highlighted), Organization, Users, Custom Data, Integrations (highlighted), Payments, Website Tracking, and Kindful. The main content area is titled "Integrated Partners" and includes a breadcrumb trail: "Accounting | Auction | Events & Ticketing | Forms / Surveys | Fundraising | Marketing | Video Messaging | Other | Zapier". A "Settings" button is located in the top right corner. Under the "Accounting" section, there are five integration cards: QuickBooks Online, QuickBooks Desktop, Aplos, Xero (with a "zapier" label on its logo), and Sage. Each card has a "Learn More" button. Under the "Auction" section, a partial card for a partner with a logo starting with 'h' is visible.

Integrations

Click Settings > Integrations > Settings button



The screenshot shows the 'Integration Settings' page in the Bloomerang interface. At the top right, a red box highlights the 'Integrated Partners' link. The page is divided into several sections: Accounting, Email, NCOA, and API Keys v2.0. The Accounting section has a dropdown menu set to 'QuickBooks Online' and a 'Connect' button. The Email section has a dropdown menu set to 'Mailchimp' and buttons for 'Go to Mailchimp' and 'Deactivate'. The NCOA section includes a link to 'View NCOA Dashboard'. The API Keys v2.0 section has a 'Go to my API Keys v2.0' button. At the bottom, there is a dropdown menu for 'API Keys v1.0'.

GIVING PLATFORM INTEGRATED PARTNERS

Integration Settings

Integrated Partners

Accounting

Select one accounting integration and click Save to configure the settings.

QuickBooks Online

Connect

Cancel Save

Email

Select one email integration and click Save to configure the settings.

Mailchimp

Go to Mailchimp Deactivate

Cancel Save

NCOA

Bloomerang has partnered with TrueGivers to offer you rightly NCOA (National Change of Address) updates as part of your Bloomerang subscription. [Click here to learn more.](#)

View NCOA Dashboard

API Keys v2.0

Go to my API Keys v2.0

API Keys v1.0

Integrations

Click Settings > Integrations > [NCOA](#)

NCOA

Bloomerang has partnered with TrueGivers to offer you nightly NCOA (National Change of Address) updates as part of your Bloomerang subscription. [Click here](#) to learn more.

[View NCOA Dashboard](#) 

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

Funds, Campaigns, and Appeals, oh my!



Funds

(only field of the three required in Bloomerang)

Funds are the big buckets of money

PRO TIP: Set up your funds to mimic your finance/accounting system. This makes record-keeping easier!

Money is going to that specific bucket.

This is usually going to be funding areas that span multiple years.

Examples:

- Unrestricted
- Program
- Scholarships

Campaigns

Campaigns are specific, overarching fundraising efforts

Campaigns are defined by the financial goal and date range. The date range could span an extended period of time depending on the type of campaign.

- Have a financial goal
- Have a specific date range
- Examples:
 - Annual Campaign
 - Capital Campaign
 - LARGE Events

Appeals

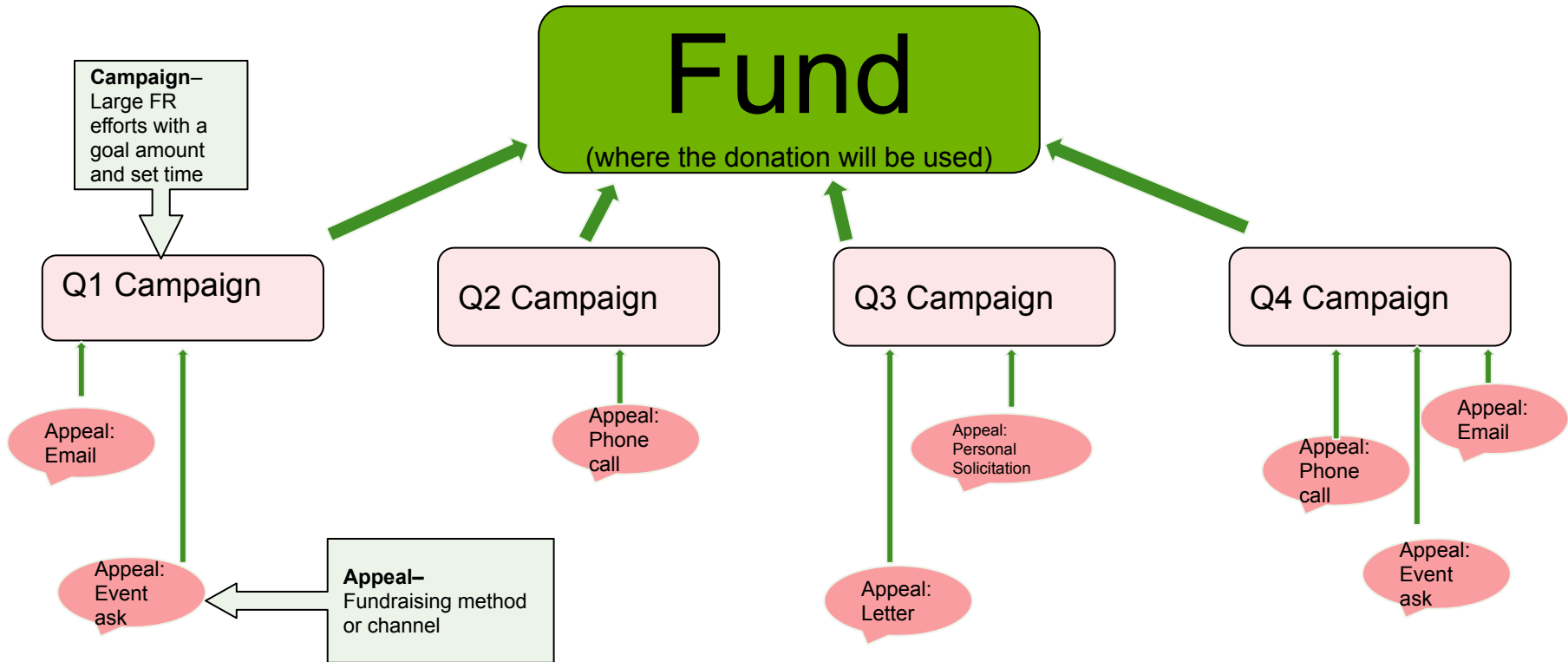
Appeals are a specific request for funds

WHY RECORD THIS? This info will help you see which types of funding requests have been most successful in the past.

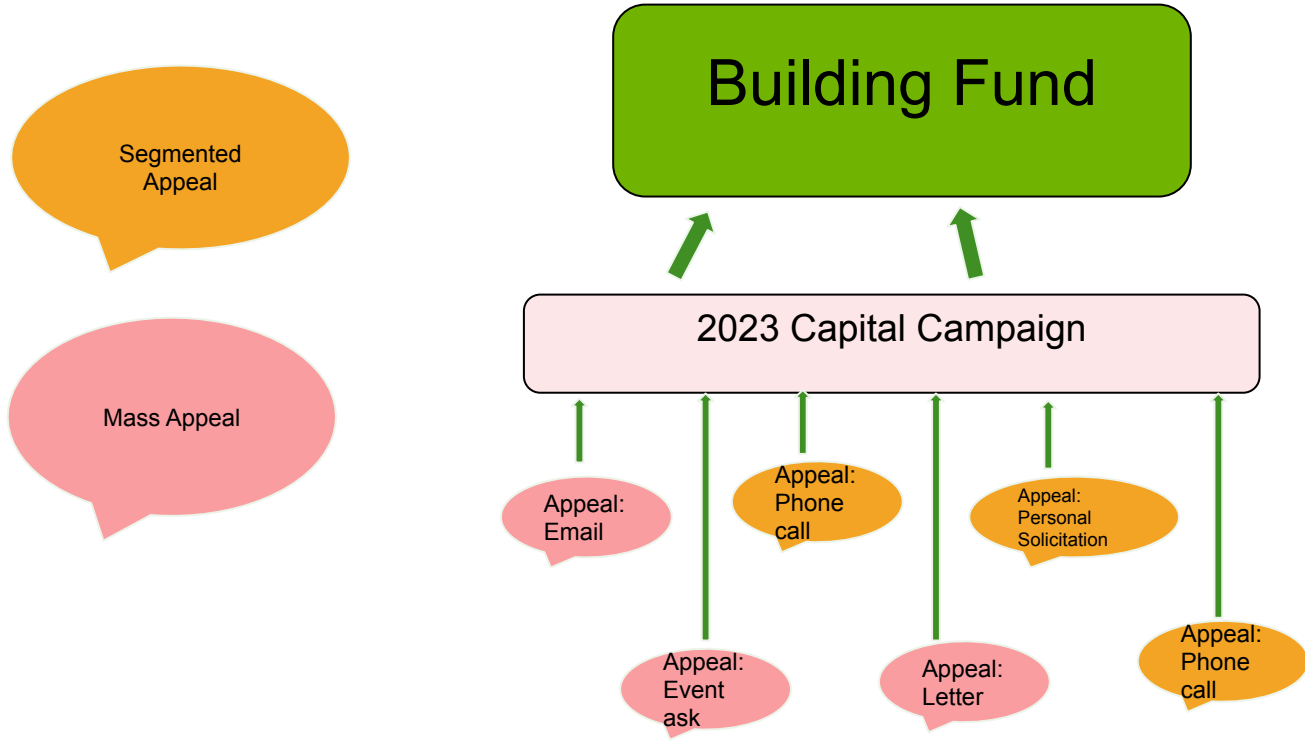
Examples:

- Spring Appeal
- Major Gift Ask
- Personal Solicitation
- Event Sponsorships

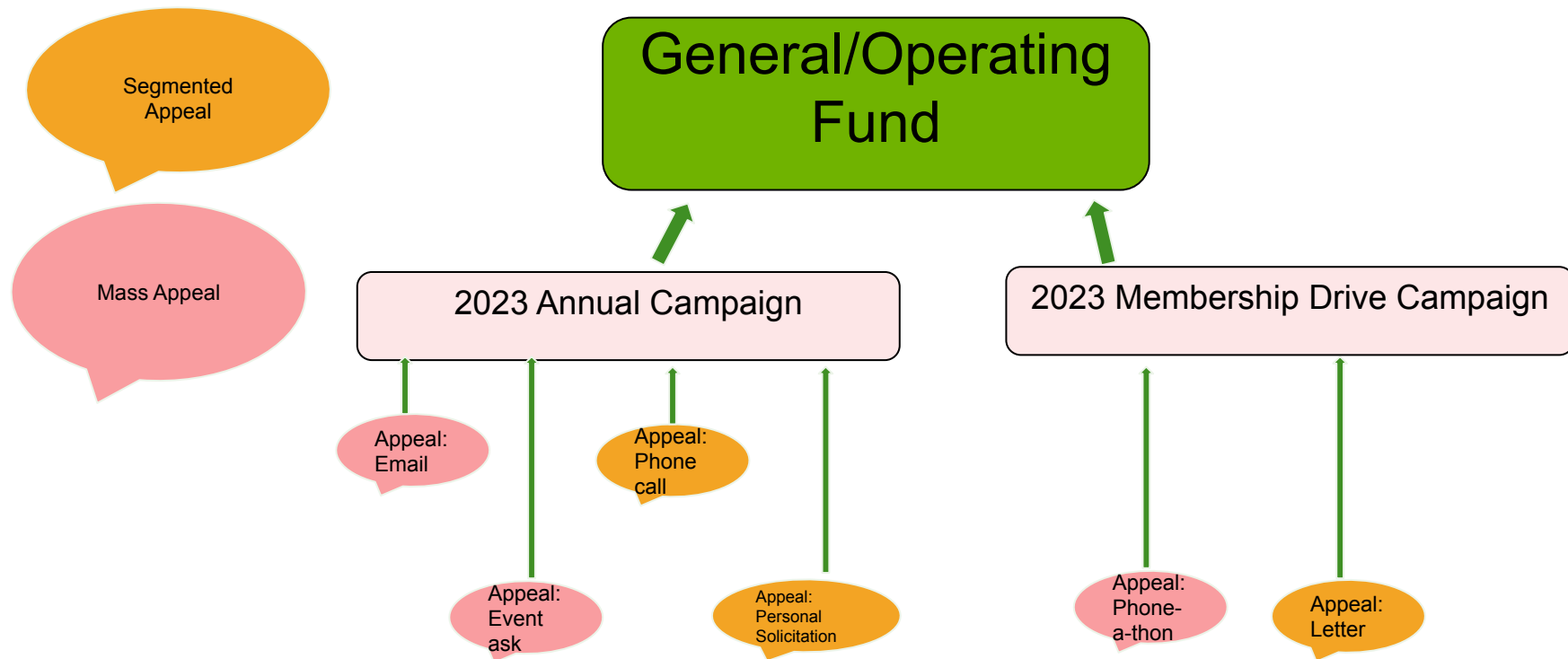
Visual of the typical relationship



Examples of this in action



Examples of this in action



Funds, Campaigns, and Appeals are not mutually exclusive!

Typically, transactions only have one Fund, Campaign, or Appeal associated with them.

Date	<input type="text" value="2/10/2023"/>
Amount	<input type="text" value="\$1,000.00"/>
Non-Deductible	<input type="text" value="\$0.00"/>
Fund	<input type="text" value="Unrestricted"/>
Campaign	<input type="text" value="2023 Capital Campaign"/>
Appeal	<input type="text" value="Personal Solicitation"/>

If a donation goes toward different Funds, e.g. \$500 to Unrestricted and \$500 to Programs, use **Split Payments**.

Why does setting this up correctly matter for clean data?

It matters for:

- Fiscal responsibility
- Segmentation of data
 - Constituent communication
 - Historical data for future decision-making
 - Running accurate reports on the success of campaigns

Large, vibrant green Monstera leaves with characteristic holes, positioned in the top-left and bottom-left corners of the slide.A portion of a vibrant green Monstera leaf with characteristic holes, positioned in the bottom-right corner of the slide.

Custom Fields and Groups

Segmentation

Think about what segments you will need data for and set those up now

What are some segments you use currently?

Consider:

Recency: How long have donors been giving?

Frequency: How often do donors give?

Type: How are donors giving?

Amount: How much are donors giving?

Reason: Why do donors give?

Interest: What topics are donors most interested in?

Segmentation

Think about what segments you want to have data for and set those up now

How to segment your data

- Bloomerang Groups
- Custom Fields—think now about what custom fields you may need for segmentation

What are custom fields

- Where are they available
- Using Custom Fields as filters

Custom fields vs. Groups

When should I use each of these? Ask yourself these questions:

- For this segment, will we need quick views of things like:
 - Demographics
 - Average transaction amount
 - Month-over-month giving
- Will we frequently reference this group as a segment in reports or communications?

Probably Groups

OR

- Will we more occasionally refer to this information for things like an annual event?
- Will we likely use this information for individual conversations with donors/stakeholders on more of a “one-off” basis?

Probably Custom fields

Duplicates















Merge duplicates to keep your constituent records accurate

Duplicate Constituents

Displaying 1 - 3 of 3

Select all on page Not Duplicates Merge Selected

<input type="checkbox"/> Don Henley	Donald Henley
 margie.worrell+don@bloomerang.com	 margie.worrell+don@bloomerang.com
 None	 None
 (232) 323-2323	 None
Primary Record	
Matching criteria: email, name	
Show More Details ▾	

<input type="checkbox"/> Gob Bluth	Gobidiah Bluth
 margie.worrell+gob@bloomerang.com	 margie.worrell+gob@bloomerang.com
 915-9961 Consectetuer Ave Newport Beach, CA 34271	 None
 (728) 208-8192	 (728) 208-8192
Primary Record	



Notifications appear here!

Head duplicates off at the pass by checking your import doc prior to importing!

Use duplicate checking tools in Excel or Google to ensure you are not importing duplicates you will have to clean up later!

	A	F	K	L	M	N
1	Organization Name	Account number	Work Address	Work City	Work State	Work Zip Code
2	Blur Photography	227	P.O. Box 519, 62	Mission Viejo	RI	27733
3	Bluth Company	236	172-2394 Ut Rd.	Henderson	DE	33700
4	Cross Applied Technologies	210	350-3442 At Stre	DuBois	NV	54001
5	Daily Bugle	233	P.O. Box 804, 24	Anchorage	WV	71529
6	Daily Planet	234	3177 Magnis Rd.	Middlebury	RI	14129
7	Duff Beer	195	2534 Eu Av.	Bentonville	NJ	14171
8	Fuchi Industrial Electronics	208	P.O. Box 856, 87	Idabel	VA	88094
9	Horizon	202	4145 Et Road	West Sacrament	NJ	65914
10	Kabletown	238	P.O. Box 710, 58	Anchorage	MO	44552
11	Law Offices of Bob Loblaw	239	131-931 Nam Av	Bayamon	MA	44308
12	Los Pollos Hermanos	219	Ap #676-7786 Ri	East Rutherford	NC	19988
13	Novatech	209	P.O. Box 156, 99	Saint Paul	WY	24705
14	Renraku Computer Systems	205	986-156 Semper	San Juan	WY	60115
15	Shiawase Corpation	206	237-3797 In Ave	Cleveland	WY	90902
16	Sink Or Swim Plumbing	225	7207 Metus. St.	Portland	CA	68506
17	The Figgis Agency	226	P.O. Box 574, 21	Indio	IA	47536

Bulk Update

Update Fund, Campaign or Appeal for Transactions

Update Transactions Tool

Previous

Update Transactions

What do you want to update? Select one or multiple options.



Fund



Campaign

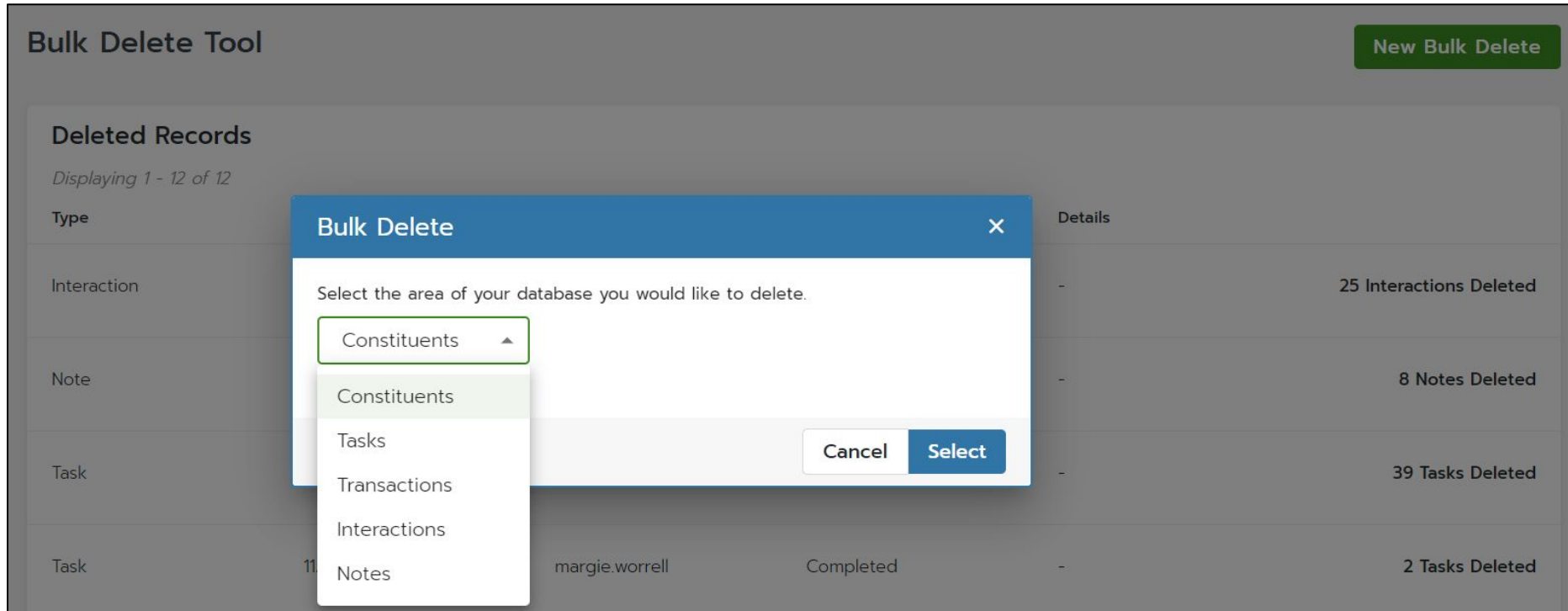


Appeal

Transactions to be updated:
1937

Bulk Delete

Remove unwanted data from your database by filtering and bulk deleting



Bulk Delete Tool New Bulk Delete

Deleted Records
Displaying 1 - 12 of 12

Type	Details
Interaction	25 Interactions Deleted
Note	8 Notes Deleted
Task	39 Tasks Deleted
Task	2 Tasks Deleted

Bulk Delete

Select the area of your database you would like to delete.

- Constituents ▲
- Constituents
- Tasks
- Transactions
- Interactions
- Notes

Cancel Select

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 smaller monstera leaf is visible in the bottom-right corner of the slide.

Q&A





Resources

[Data Policies and Procedures](#) (Free Template)

Knowledgebase

[Fund, Campaign, & Appeal Basics](#)

[Custom Field Basics](#)

[Edit Categories, Custom Fields, and Values](#)

[Review and Merge Duplicate Constituents](#)

[Set Up SPF and DKIM for Email Delivery](#)

[Bulk Delete Constituents](#)

[Bulk Update Transactions: Update Campaigns, Appeals, and Funds](#)

[About Year-End Giving Statements \(Tax Summaries\)](#)

Articles

[If Your Donor Data Isn't Getting Better, It's Getting Worse](#)

[The 5 C's Of Healthy Donor Data](#)

[What Is Bad Data Really Costing Your Organization?](#)

BLOOMERANG ACADEMY WILL HAVE A NEW HOME AND A NEW NAME!

Access all of your education in one place!

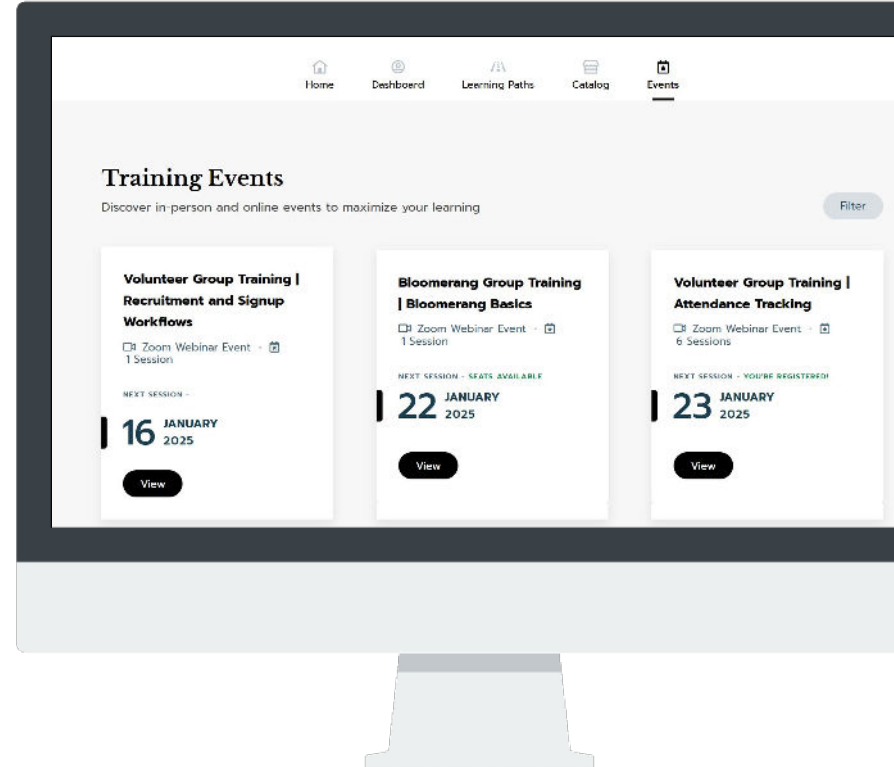
NEW NAME: Bloomerang Learning, now featuring **Group Trainings** as well as On-demand Courses

WHEN: March 13th

WHERE: Bloomerang Learning > Events

To access Bloomerang Learning, just click on the question mark in the upper right corner of your database and then click **Bloomerang Learning**.

Don't yet have a **Bloomerang Learning account**? No problem! You can request access by using the link at the bottom of the login page.



Thanks for joining!

More tools and resources to help you grow.

Connect with us!
support@bloomerang.com

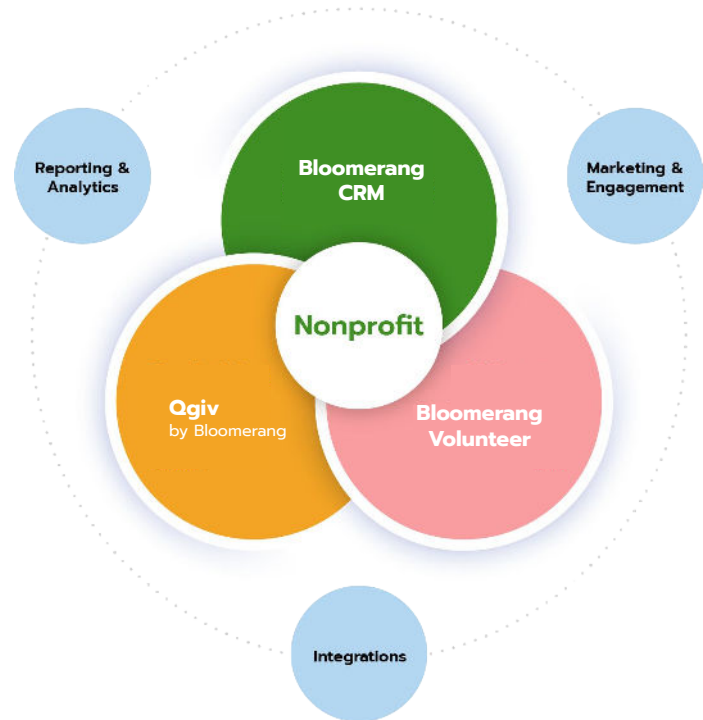
Request a demo
[Bloomerang.co/demo](https://bloomerang.co/demo)

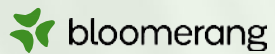
New! [Bloomerang Learning](#)
on-demand training

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!

