

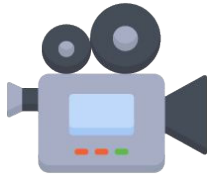
Working with Constituents: Individuals and Organizations

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.

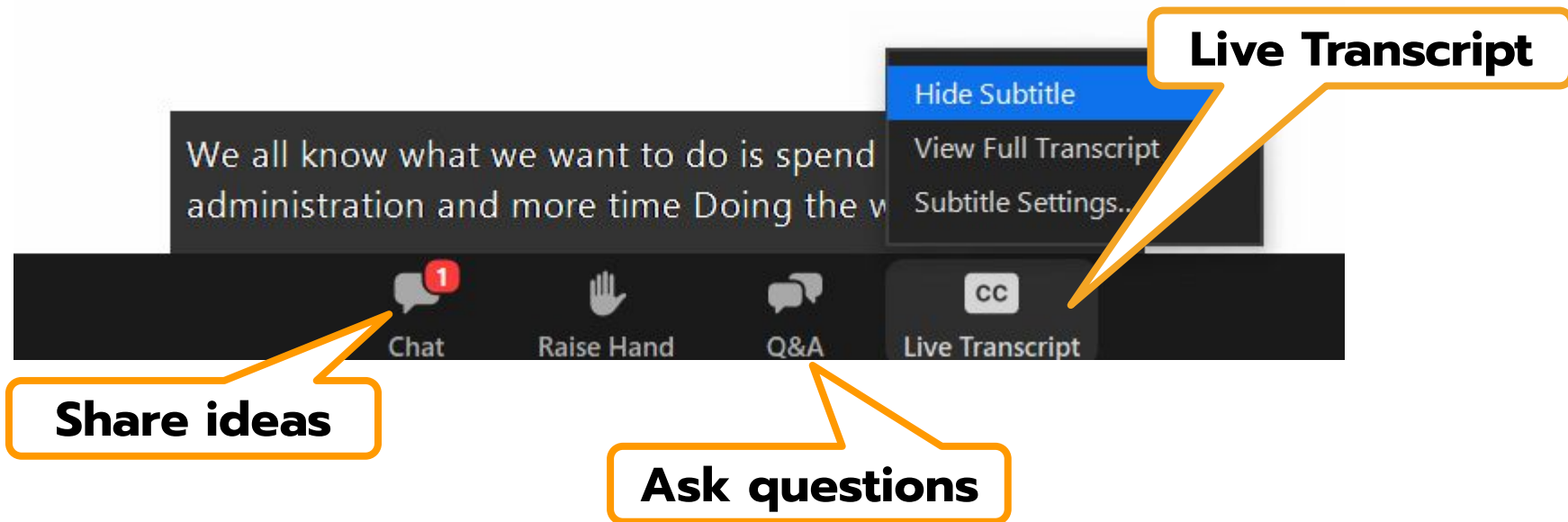


Feel free to ask questions! Use the Q&A option to ask questions and the chat option for general discussion. We'll answer questions at the end of the presentation.



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**

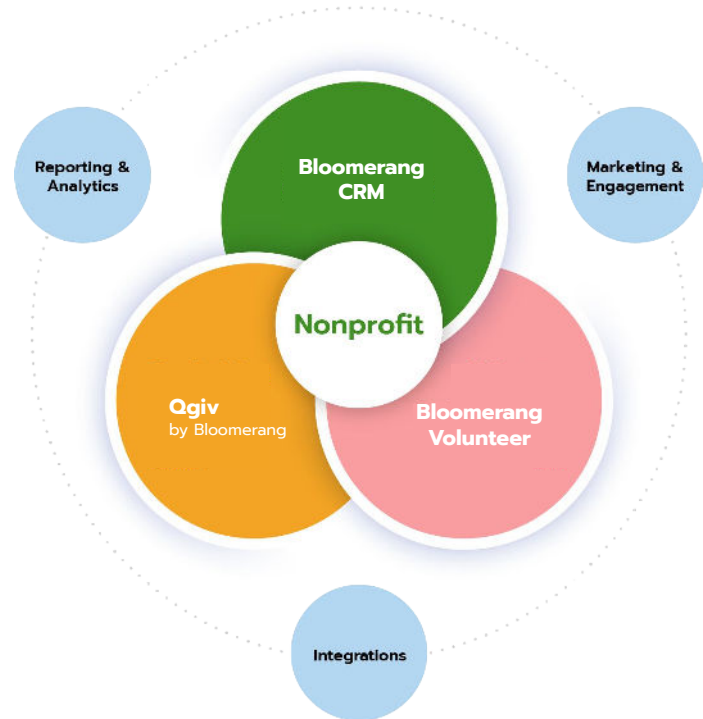
**Industry leading
solutions**

**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.

Constituent Dashboard overview

Individual vs. Organization Constituents

Parts of a Constituent Account

1. Header
2. Summary
3. Profile
4. Timeline
5. Relationships

Create, edit and delete individual and organizational constituents

**What will we
cover today?**

Constituent Dashboard overview

Analytics section

bloomerang <<
All
?

- Home
- Constituents
- Groups
- Reports
- Communications
- Data Tools
- Settings
- Kindful

CONSTITUENTS
526

NEW THIS MONTH
80

NEW THIS YEAR
80

DONORS BY LIFECYCLE STAGE

66

PROSPECTIVE

Donors you are cultivating but who have not yet made a gift.

290

CURRENT

Donors who have given within the last 13 months.

122

LAPSED

Donors who have given but not within the last 13 months.

LIFECYCLE TOTAL
478

NEW THIS MONTH
80

NEW THIS YEAR
80

DONOR TYPES

Donor Type	Count
NEW	110
RETAINED	50
RECAPTURED	125
RECURRING	20

Analytics

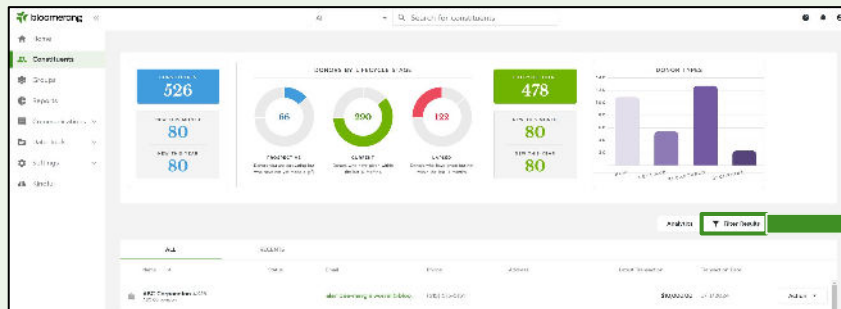
Filter Results

Add Constituent

ALL	RECENTS					
Name	Status	Email	Phone	Address	Latest Transaction	Transaction Date
ABC Corporation #415 <small>ABC Corporation</small>		alan.bee+margie.worrell@bloo...	(515) 515-5151		\$10,000.00	3/11/2024
						Action

Constituent Dashboard overview

Filter Results



Filter Results By: (0) Reset All Filters

Constituents

NAME:

TYPES:

STATUS:

Bloomerang Donor Groups

DONOR LIFECYCLE STAGE:

DONOR TYPES:

Name

Email

Phone Number

Address

Employer

Constituent types

Two flavors—Individual and Organization

Individual

Pam Beesly
#Beesly/1alport Family
#327 margie.worrell+pambeesly@bloomerang

Address
350 Cliff St
Scranton, PA 18503-1908

Summary Profile Timeline Relationships

Giving Summary Revenue Raised Soft Credits

Year	Revenue
'16	~100
'17	~100
'18	~100
'19	~100
'20	~100
'21	~100
'22	~1400
'23	~100
'24	~100
'25	~100

Engagement Level

Warm

Generosity Update

Cool

View in DonorSearch

Lifetime \$3,100.00 \$3,100.00

Average \$238.46 \$238.46

First Transaction \$250.00 1/15/2012

Latest Transaction \$300.00 1/21/2025

Largest Transaction \$500.00 1/4/2022

Relationships

Organization

Acme Corporation
#192 bugs.bunny+margie.worrell@bloomerang...

Address
573-4949 Montas, St
Downey, NH 23558

Phone
Mobile: (199) 647-2779

Relationship Manager
margie.worrell

Summary Profile Timeline Relationships

Giving Summary Revenue Raised Soft Credits

Year	Revenue
'16	~1480
'17	~174
'18	~100
'19	~100
'20	~100
'21	~100
'22	~100
'23	~100
'24	~100
'25	~100

Engagement Level

Warm

Relationships

Charles Barkley Employee

Richard Belding Employee

Lifetime \$9,825.00 \$9,825.00



Average \$327.50 \$327.50



First Transaction \$100.00 10/4/2014



Latest Transaction \$1,000.00 8/4/2023

Largest Transaction \$2,000.00 4/23/2015

Constituent Header and Tabs

 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	


 Pam Beesly 🏠 Beesly/Halpert Family #322 margie.worrell+pambeesly@bloomerang...	Address 350 Cliff St Scranton, PA 18503-1908			
Summary	Profile	Timeline	Relationships	

 Lucille Bluth 🏠 The Bluths #131 INACTIVE	Address 🚫 Bad address			
Summary	Profile	Timeline	Relationships	

Constituent Header and Tabs

Summary tab

- Giving Summary
- Recent Timeline
- Engagement Level
- Generosity Score
- Relationships


 **Pam Beesly**
Beesly/Halpert Family
#327 margie.worral-pambeesly@bloomerang

Address
350 Cliff St
Scranton, PA 18503-1908

Summary Profile Timeline Relationships

Giving Summary

Revenue Raised Soft Credits



Year	Revenue
'18	~200
'19	~200
'20	~200
'21	~200
'22	~1400
'23	~200
'24	~200
'25	~200

Lifetime \$3,100.00 **Average** \$238.46 \$238.46

First Transaction \$250.00 1/15/2012 **Latest Transaction** \$300.00 1/21/2025

Largest Transaction \$500.00 1/4/2022

Recent Timeline Activity

- 1/21/2025 Donation \$300.00
- 6/4/2024 Email Impact/Cultivation - Email about DM Campaign starting soon
- 3/28/2024 Mail Solicitation - Letter: Letters Part 2 Constituent solicitation for larger d
- 3/4/2024 Refund (\$100.00)
- 3/4/2024 Refund (\$600.00)
- 2/14/2024 Email Acknowledgement - Thank you for your donation!
- 2/14/2024 Donation \$600.00
- 11/28/2023 Other Other - Make a note
- 10/12/2023 Mail Solicitation - Letter: 2023 EOY Appeal #1 Letter (all donors)
- 8/8/2023 Other Other - Remove member from attribute

Go to Timeline

Engagement Level

Warm

Generosity

Cool

View in DonorSearch

Relationships

- Dunder Mifflin Employer
- Jim Halpert Partner
- Michael Bluth Friend

Constituent Header and Tabs

Profile tab

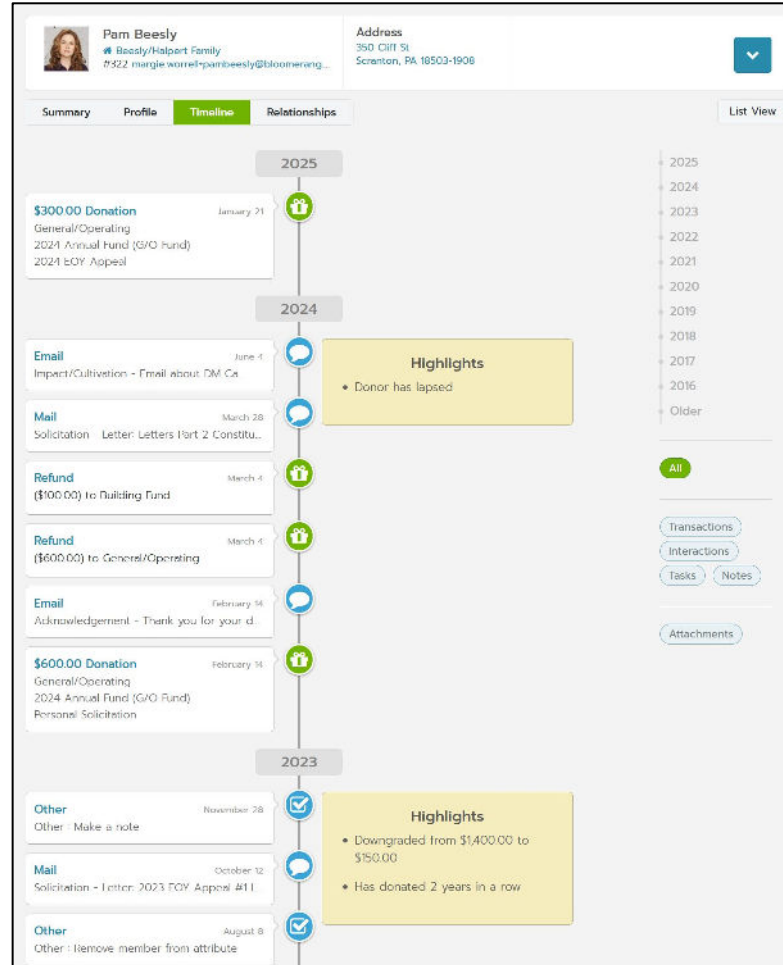
- Information area
- Click **Edit** to revise
 - Can also merge, change type or delete
- Custom fields show up here
- *Created* and *Last Modified* info at the bottom

The screenshot displays a constituent profile for Pam Beesly. At the top, there is a header with a profile picture, name, and address. Below this, a navigation bar includes tabs for Summary, Profile (highlighted), Timeline, and Relationships. The main content area is divided into several sections: Basic Info (Status: Active, Informal Name: Pam, Formal Name: Ms. Beesly, Envelope Name: Ms. Pam Beesly, Recognition Name: Ms. Pam Beesly), Personal Information (Facebook, Twitter, LinkedIn, Website: www.dundermiffin.com, Gender: Female, Birthdate, Employer: Dundee Mifflin, Job Title), Volunteer Info (Skills and Talents, Availability: Day, Weekends, Activity), Addresses (Home: 350 Cliff St, Scranton, PA 18503-1908; Work: 1433 N Main Ave, Scranton, PA 18508), Emails (Home: margie.warrell+pambeesly@bloomerang.com; Home: test-pam.beesly@bloomerang.co), Phone Numbers, Communication Preferences (Preferred Channel: Mail, Restrictions: Do Not Call, Email Interests: The constituent will not receive any emails), and Groups (Current Groups: Bloomerang Groups, Current, Retained). Each section includes an 'Edit' button, and the Groups section has a 'Groups Summary' button.

Constituent Header and Tabs






Timeline tab

- Can switch to list view
- Can filter on right by type
- Icons match type
- Click on year on right to go to that year
- Highlights show major moments

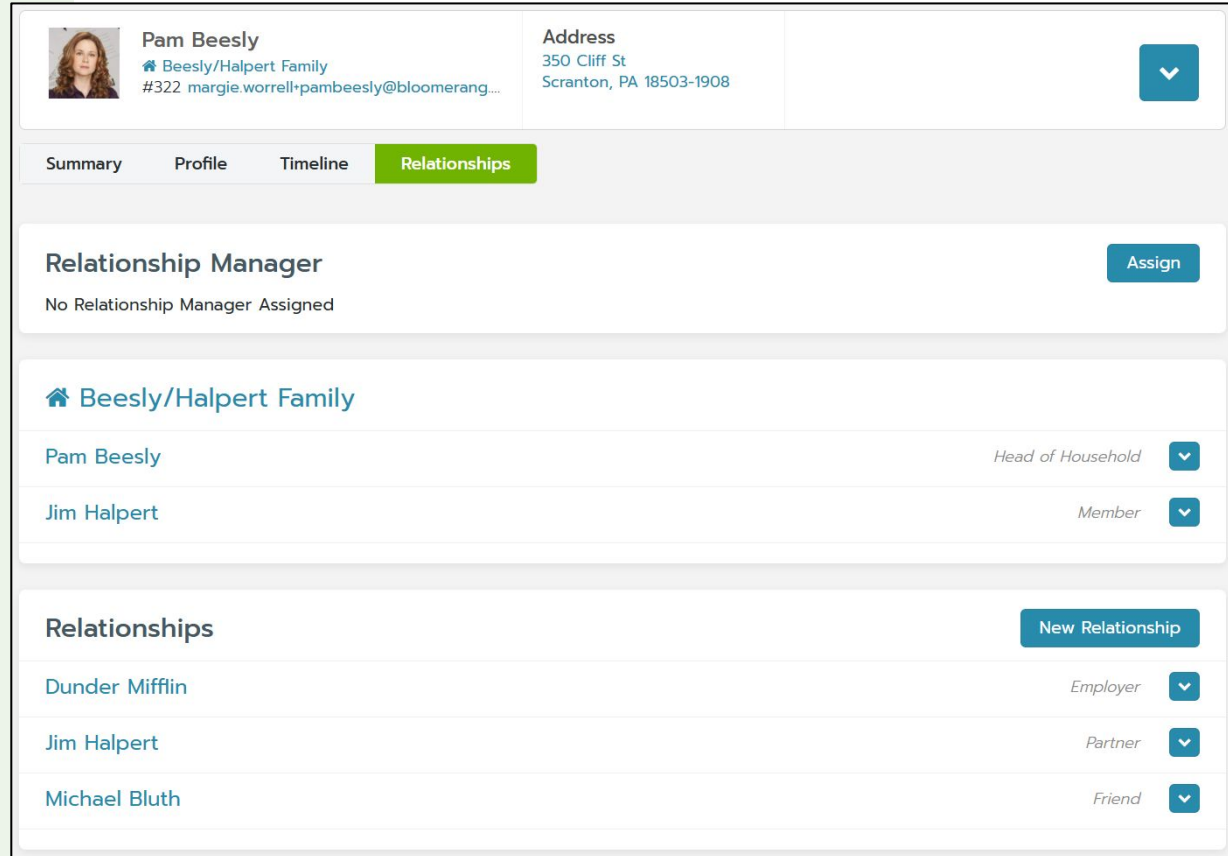


The screenshot displays the constituent profile for Pam Beesly. The header includes her name, contact information, and address. Below the header are tabs for Summary, Profile, Timeline (selected), and Relationships. A 'List View' button is also present. The main content area shows a vertical timeline of events from 2023 to 2025. The 2025 section includes a \$300.00 donation. The 2024 section includes an email, a mail solicitation, a refund, another refund, an email acknowledgment, and a \$600.00 donation. The 2023 section includes an 'Other' note, a mail solicitation, and another 'Other' note. A 'Highlights' box on the right side of the timeline lists 'Donor has lapsed' for 2024 and 'Downgraded from \$1,400.00 to \$150.00' and 'Has donated 2 years in a row' for 2023. On the far right, there is a vertical year selector and a filter menu with options for Transactions, Interactions, Tasks, Notes, and Attachments.

Timeline Icons

Timeline Entry Type	Icon
Transaction	
Interaction	
Note	
Task	
Has attachment	

Constituent Header and Tabs



The screenshot displays the Bloomerang interface for a constituent profile. At the top, there is a header section with a profile picture of Pam Beesly, her name, and contact information including a home icon, family name 'Beesly/Halpert Family', and an email address. To the right, the address '350 Cliff St, Scranton, PA 18503-1908' is listed. 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 titled 'Relationship Manager' and includes an 'Assign' button. Below this, it states 'No Relationship Manager Assigned'. A section titled 'Beesly/Halpert Family' with a home icon lists household members: Pam Beesly (Head of Household) and Jim Halpert (Member). A 'New Relationship' button is located to the right of this list. Below, a 'Relationships' section lists other relationships: Dunder Mifflin (Employer), Jim Halpert (Partner), and Michael Bluth (Friend).

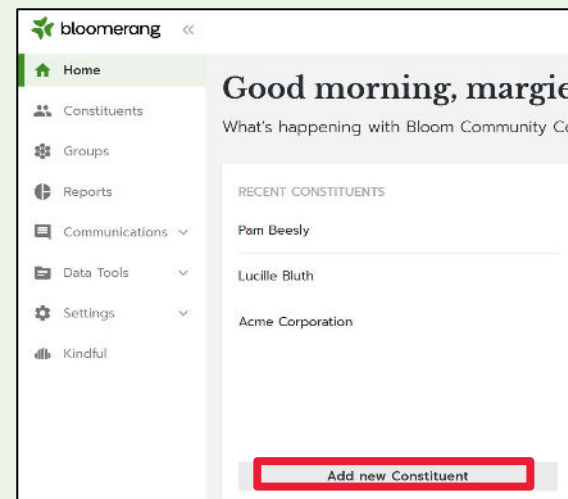
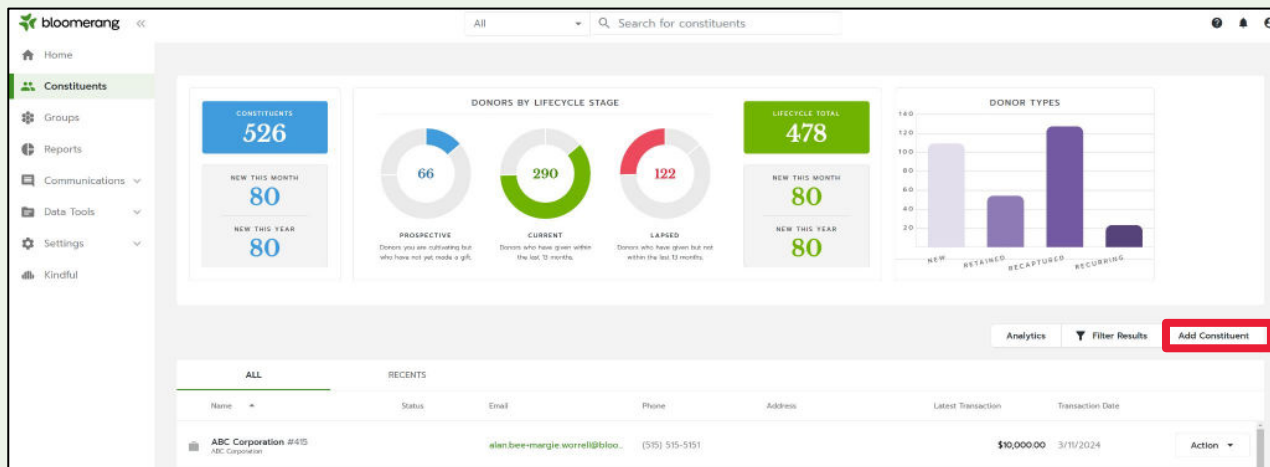
Summary	Profile	Timeline	Relationships
Relationship Manager Assign			
No Relationship Manager Assigned			
Beesly/Halpert Family			
Pam Beesly		Head of Household ▼	
Jim Halpert		Member ▼	
Relationships New Relationship			
Dunder Mifflin		Employer ▼	
Jim Halpert		Partner ▼	
Michael Bluth		Friend ▼	

Relationships tab

- Shows Relationship Manager
- Shows household relationships
- Shows employer relationship
- Shows other relationships with people in your database

Add a constituent

More than one way!




PRO TIP: Search for an account with that name before you add a new constituent to cut down on duplicates!


Select constituent type



New Constituent

What type of Constituent are you creating?

Individual
An individual Donor, Volunteer, Contact, etc. 

Organization
A company or organization account with a primary contact. 

Fill in the demographic information and then any custom fields you have created. Don't forget to click SAVE.



New Individual

Edit Details

Title

Informal Name

First Middle Formal Name

Last Envelope Name

Suffix Recognition Name

Personal Information

Gender

Employer

Birthdate

Job Title

Households

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

Contact Information

Country United States

Email

Address

Type Home

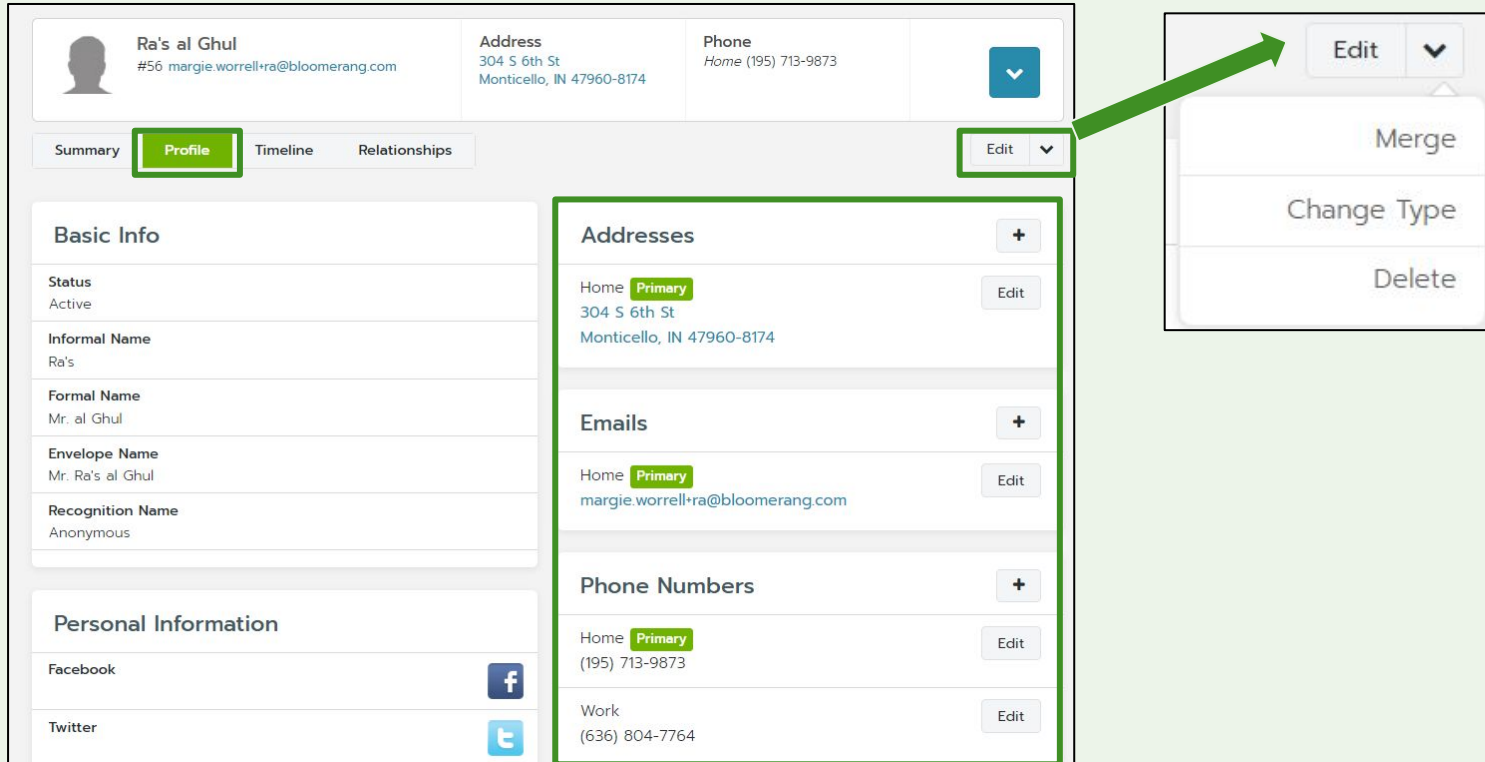
City

Phone (###) ###-####

State

Edit a constituent

Profile tab → Edit



The screenshot shows the Bloomerang constituent profile for Ra's al Ghul. The profile is displayed in a card-like format with tabs for Summary, Profile, Timeline, and Relationships. The Profile tab is selected. The profile information includes:

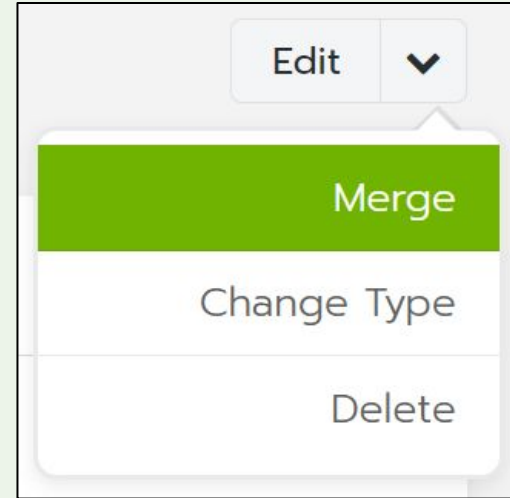
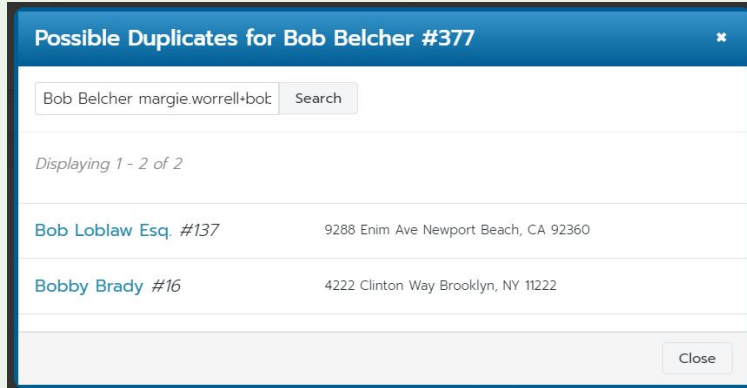
- Basic Info:** Status (Active), Informal Name (Ra's), Formal Name (Mr. al Ghul), Envelope Name (Mr. Ra's al Ghul), Recognition Name (Anonymous).
- Personal Information:** Facebook and Twitter links.
- Addresses:** Home (Primary) at 304 S 6th St, Monticello, IN 47960-8174.
- Emails:** Home (Primary) at margie.worrell+ra@bloomerang.com.
- Phone Numbers:** Home (Primary) at (195) 713-9873 and Work at (636) 804-7764.

An 'Edit' button is located in the top right corner of the profile card. A green arrow points from this button to a dropdown menu that is open, showing the following options:

- Edit
- Merge
- Change Type
- Delete

Merge a constituent

Profile tab—merge



Note: Constituents can only be merged if they are the same account type. To merge individuals and organizations, change the account type to match, and then merge.

Change type

Profile tab—change type

Change Type to Organization

Organization

Name

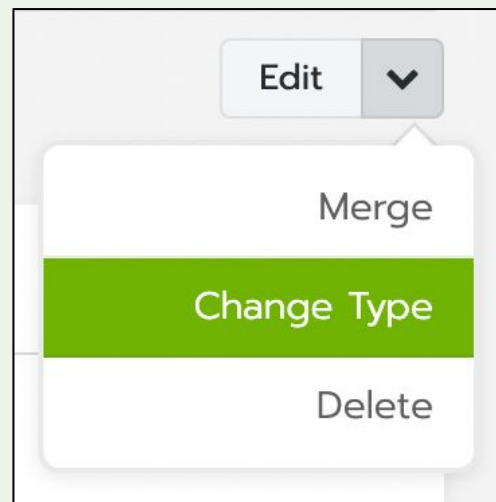
Primary Contact

Title Informal Name

First Middle Formal Name

Last Envelope Name

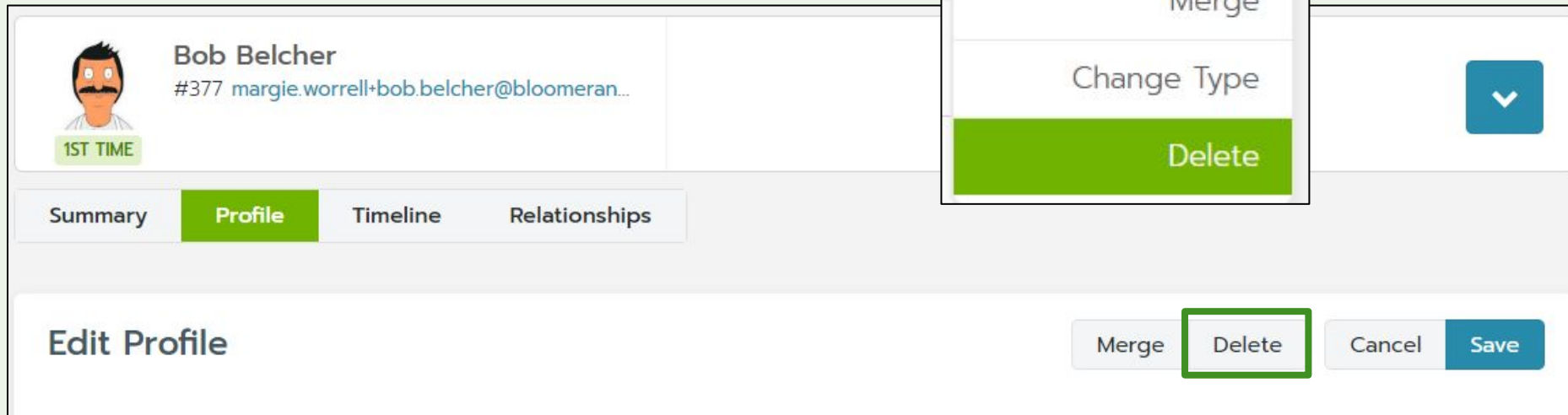
Suffix Recognition Name



Note: Can be used if you entered someone in as an individual, but realize that they should have been entered as a contact for an organization.

Delete a constituent

Profile tab



The screenshot shows the constituent profile for Bob Belcher. The profile card includes a cartoon avatar, the name "Bob Belcher", and the email address "#377 margie.worrell+bob.belcher@bloomeran...". A "1ST TIME" badge is visible below the avatar. Below the profile card are tabs for "Summary", "Profile" (which is active), "Timeline", and "Relationships". A dropdown menu is open over the profile card, showing options: "Edit", "Merge", "Change Type", and "Delete" (highlighted with a green box). At the bottom of the page, there are buttons for "Edit Profile", "Merge", "Delete" (highlighted with a green box), "Cancel", and "Save".

Warning: If the constituent has any transactions, you must delete the transaction data before you can use the Delete button on the Profile page to delete the account. To delete a constituent and transactions at the same time, you must use the Mass Delete tool.

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



[Constituents](#)

[Constituent Dashboard](#)

[Create Constituents](#)

[Edit, Merge and Delete Constituents](#)

[Summary Page](#)

[Timeline](#)

[Notes](#)

[Interactions](#)

[Add and Manage Profile Pictures](#)

[Constituent Dashboard](#)

[Review and Merge Duplicate Constituents](#)

[Bulk Delete Constituents](#)

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

Access all of your education in one place!

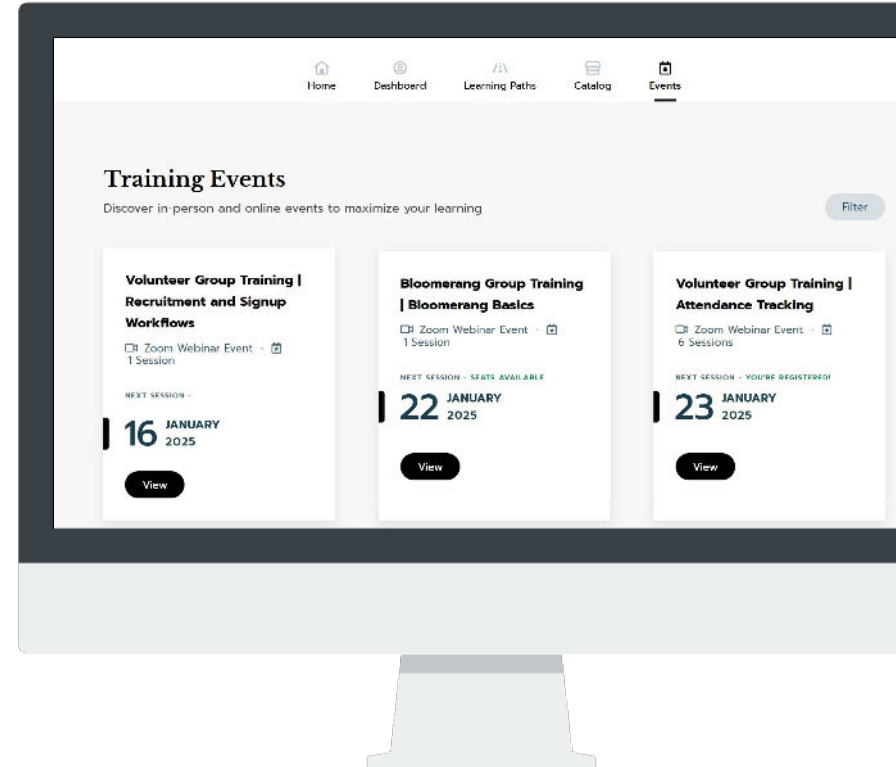
NEW NAME: Bloomerang Learning, now featuring Group Trainings as well as On-demand Courses

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

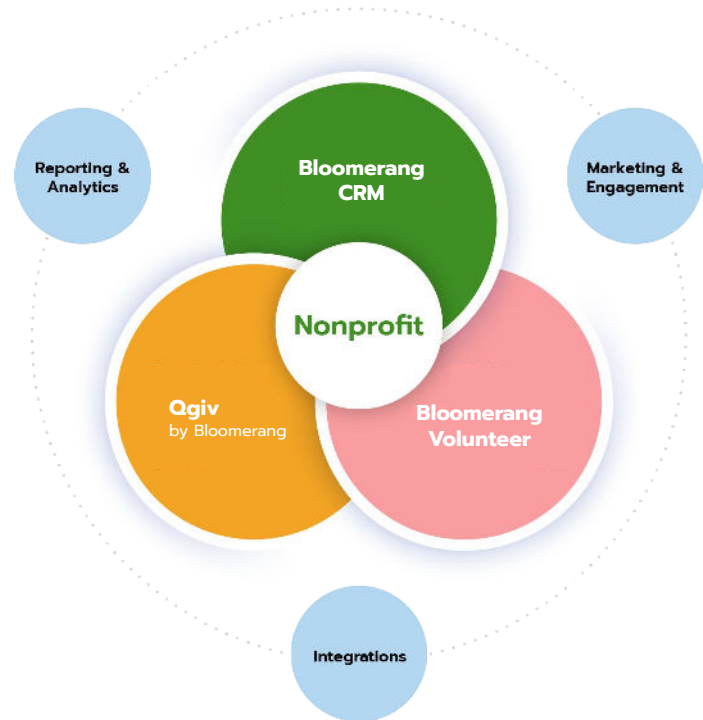
Request a demo
[Bloomerang.co/demo](https://bloomerang.co/demo)

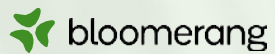
New! [Bloomerang Learning](#)
on-demand training

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!

