

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

Welcome to Bloomerang Academy

Thank you for joining us!

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

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

Dial in audio access: **+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!

UPDATED: Creating Emails Part 1



What will we cover today?



- Set your organization up for successful email communication
 - Understand what an SPF record is and how it pertains to Bloomerang
 - Have reasonable expectations for a good deliverability rate and sending reputation
- Gain a solid foundation to begin creating emails in Bloomerang
 - What features exist in our Design area with our new updates
 - How to find things in the Communication area with our new updates
 - Basics of sending an email
 - Send Now
 - Schedule for Later
 - Basics of Email Tracking

Set Your Organization Up for Successful Email Communication

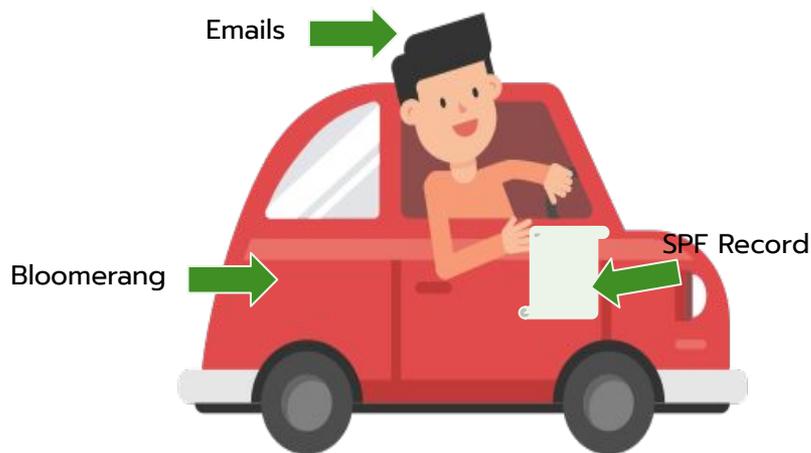


What is SPF?

Sender Policy Framework is a protocol designed to restrict who can use an organization's domain as the source of an email message. SPF blocks spammers and other attackers from sending email that appears to be from a legitimate organization.

To send from your domain in Bloomerang, you need to authorize Bloomerang to send emails on your behalf.

The Car Analogy



Your **email messages** are like your **passengers**. They have places to go and people to see!

Bloomerang is like your **car**. It's how your emails are going to get from Point A to Point B.

Your **vehicle registration** is like your **SPF record**. If you don't have it, you're going to get in trouble and have a hard time reaching your destination!

You want to authorize Bloomerang to send emails on your behalf.

Do I have to set up my SPF record?

No, but it is **highly recommended** for optimal deliverability (just like it is **highly recommended** to register your vehicle in our analogy).

If your domain does not have an SPF record OR if Bloomerang detects that you haven't added our email provider to your existing SPF record, we will send your email from the **Bloomerang Mailman domain** instead which already has an SPF record set up.

This will appear like "**orgname@mailman.bloomerang-mail.com**" in your recipients' inboxes.

[Set Up SPF](#) This is the Knowledgebase area with articles which can walk you through the process of setting up your SPF. Check it out!

How to Add or Update Your SPF Record

This depends on your domain name provider, also known as your web host.

- Don't know who your web host is? Find it [here](#).
- Need help editing your SPF record within your web host? Find guides [here](#).
- Comprehensive Bloomerang help documentation can be found [here](#).

Stuck or confused? Our Support Team will be happy to offer as much guidance as they can!

Email Deliverability



There is no such thing as 100% deliverability.

Not all of your emails will reach their target destinations and that's okay.

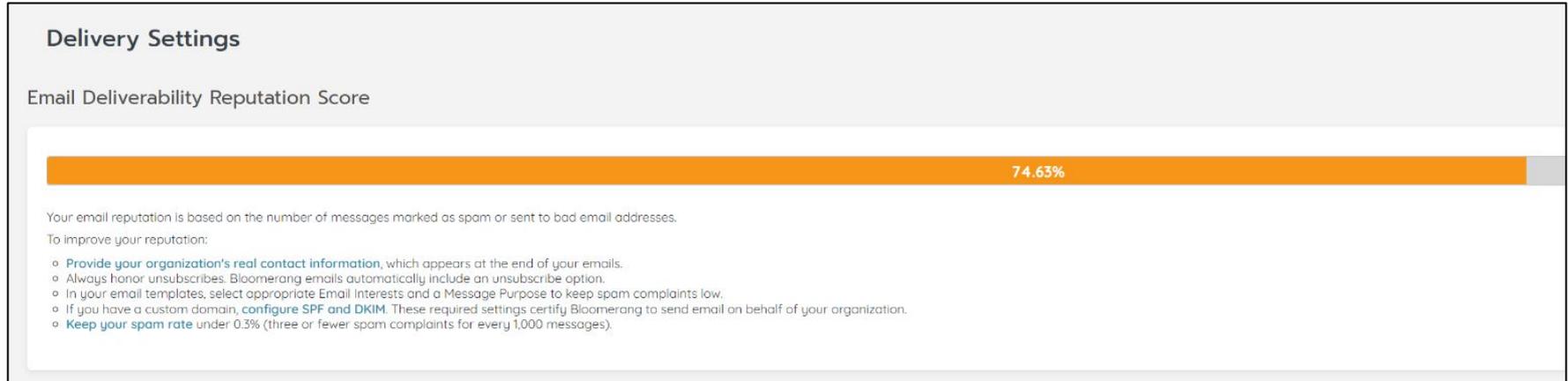
An acceptable deliverability rate is considered to be about **80% or higher**.

An EXCELLENT deliverability rate is considered to be **above 90%**.

The importance of a good sending reputation



Your reputation is based on the number of messages marked as spam or sent to bad email addresses. If your domain has a poor sending reputation (even if you have an SPF record set up), your recipients' spam filters are less likely to let your emails in. **A good sender reputation score is 80% or higher.**



[Find out more about the three types of required email authentication: Sender Policy Framework \(SPF\), DomainKeys Identified Mail \(DKIM\), and DMARC \(Domain-based Message Authentication, Reporting and Conformance\).](#)

How to foster a good sending reputation



- Only send **relevant information** to your constituents.
- Avoid an overabundance of **images and links**.
- **Honor unsubscribes** and don't opt constituents back into your lists.
- **If an email fails to reach its target destination, do not continue trying to send to that email address.**

Organization Settings



To access in Bloomerang:

- Click “Settings”
- Click “Organization”

This information will appear at the bottom of your mass emails. It is required by law.

Our Contact Information

Guardians
5724 Birtz Road
Indianapolis, IN 46216
866-332-2999
<http://www.bloomerang.com>

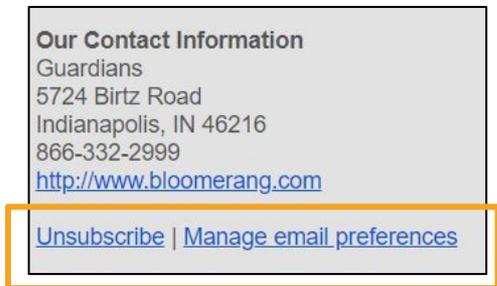
[Unsubscribe](#) | [Manage email preferences](#)

Edit Details

Cancel Save

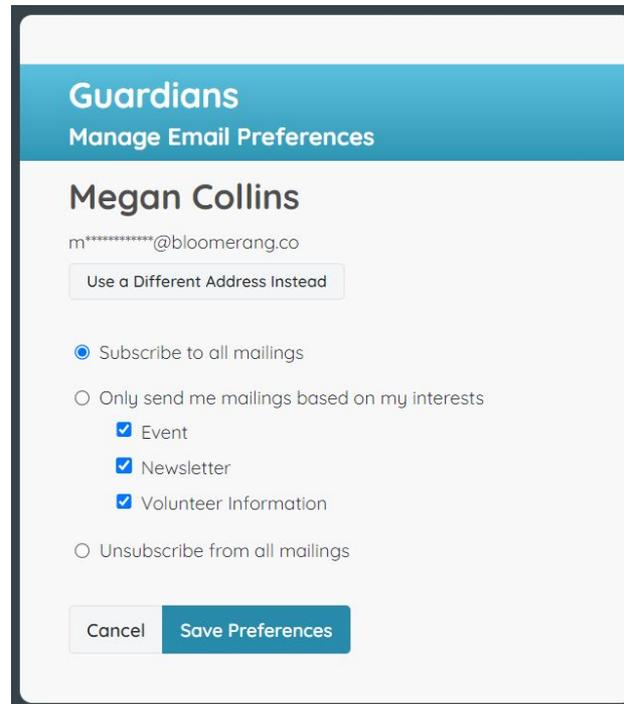
Organization Name	Guardians	Website	www.bloomerang.com
Email	support@bloomerang.com	Facebook Page	facebook.com/yourpage 
Phone	866-332-2999	Twitter Handle	@twitterhandle 
Country	United States	LinkedIn Page	linkedin.com/ 
Address	5724 Birtz Road	NTEE Code	M40 Safety Education
City	Indianapolis	Fiscal Year Start	January 1 
State	Indiana		
ZIP Code	46216		

What does the constituent see?



Email interests should be clearly defined and easy for your constituents to interpret.

Select email interests with intent when sending emails or your constituents are likely to just opt out entirely.



Email integrations

If you integrate [Mailchimp](#) or [Constant Contact](#) with Bloomerang, here is where you will find that access.

Integrations

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](#)

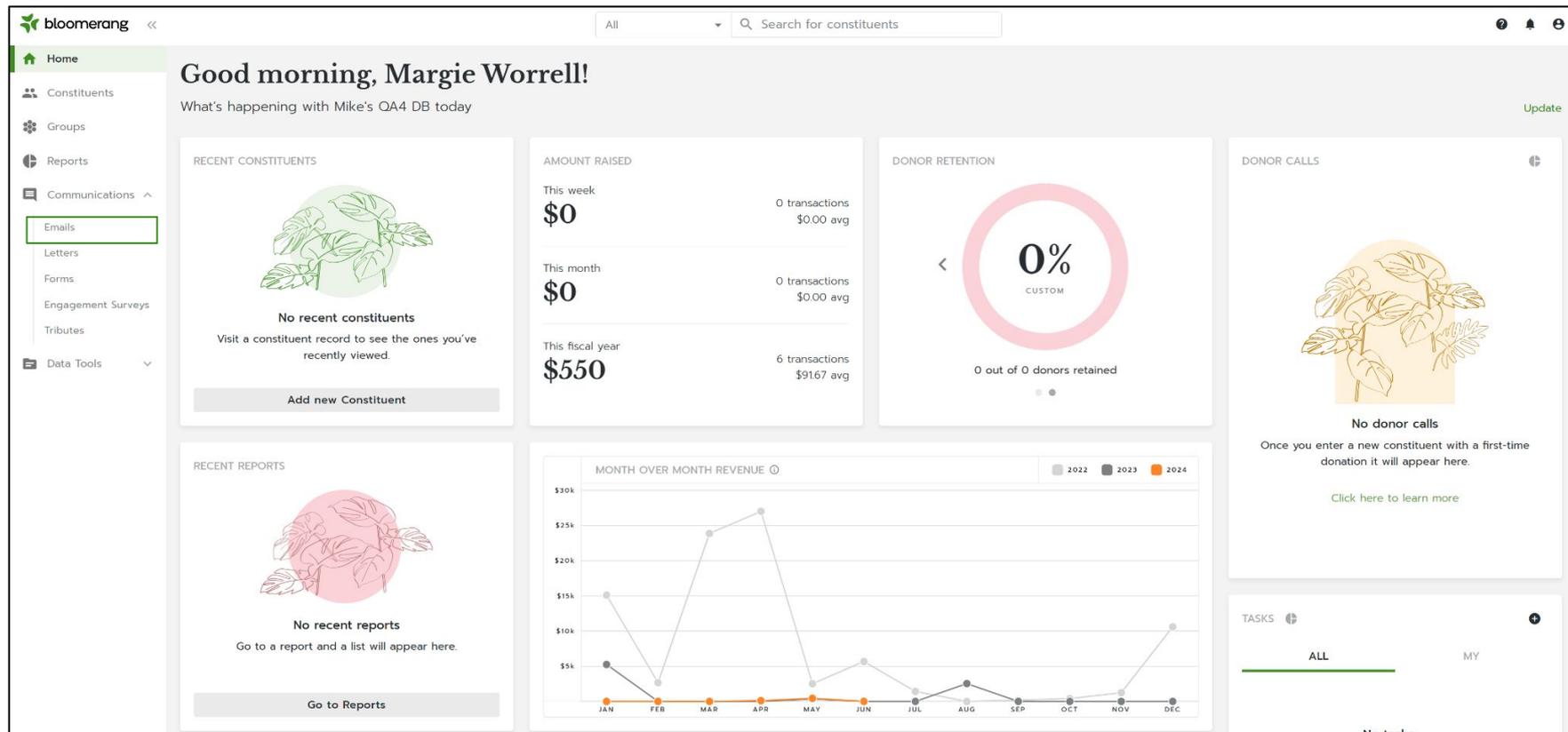


Creating Emails in Bloomerang



Start with Communications

Click on Email to get into your email feature



bloomerang << All Search for constituents

Home

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

Good morning, Margie Worrell!
What's happening with Mike's QA4 DB today Update

RECENT CONSTITUENTS



No recent constituents
Visit a constituent record to see the ones you've recently viewed.

[Add new Constituent](#)

AMOUNT RAISED

This week
\$0
0 transactions
\$0.00 avg

This month
\$0
0 transactions
\$0.00 avg

This fiscal year
\$550
6 transactions
\$91.67 avg

DONOR RETENTION



0 out of 0 donors retained

DONOR CALLS



No donor calls
Once you enter a new constituent with a first-time donation it will appear here.

[Click here to learn more](#)

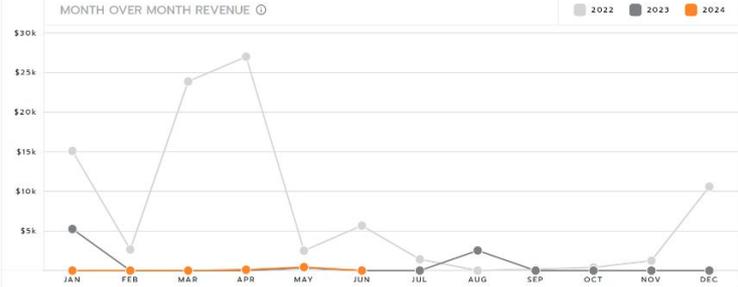
RECENT REPORTS



No recent reports
Go to a report and a list will appear here.

[Go to Reports](#)

MONTH OVER MONTH REVENUE



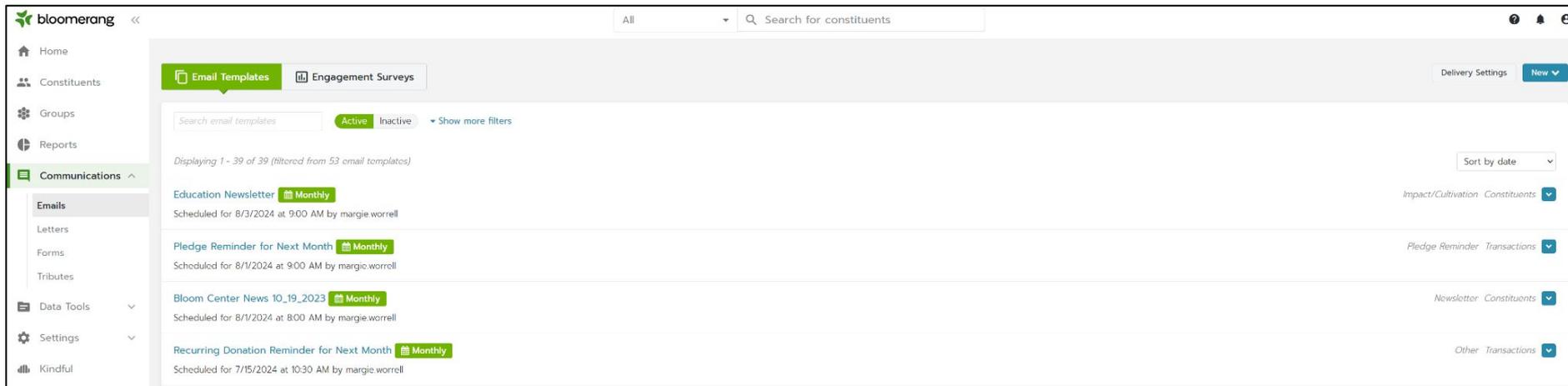
Month	2022	2023	2024
JAN	\$15k	\$5k	\$0
FEB	\$3k	\$0	\$0
MAR	\$24k	\$0	\$0
APR	\$27k	\$0	\$0
MAY	\$3k	\$0	\$0
JUN	\$5k	\$0	\$0
JUL	\$2k	\$0	\$0
AUG	\$3k	\$0	\$0
SEP	\$1k	\$0	\$0
OCT	\$1k	\$0	\$0
NOV	\$2k	\$0	\$0
DEC	\$10k	\$0	\$0

TASKS

ALL MY

No tasks

Email home page before...



The screenshot shows the Bloomerang interface for managing email templates. The left sidebar contains navigation options: Home, Constituents, Groups, Reports, Communications (expanded), Emails (selected), Letters, Forms, Tributes, Data Tools, Settings, and Kindful. The main content area is titled "Email Templates" and includes a search bar for constituents, a "Delivery Settings" button, and a "New" button. Below the search bar, there are tabs for "Email Templates" and "Engagement Surveys". A search bar for email templates is present, along with "Active" and "Inactive" filters and a "Show more filters" link. The main list displays four email templates, each with a "Monthly" frequency indicator, a title, a scheduled date and time, and the sender's name. The templates are: "Education Newsletter" (scheduled for 8/3/2024 at 9:00 AM), "Pledge Reminder for Next Month" (scheduled for 8/1/2024 at 9:00 AM), "Bloom Center News 10_19_2023" (scheduled for 8/1/2024 at 8:00 AM), and "Recurring Donation Reminder for Next Month" (scheduled for 7/15/2024 at 10:30 AM). Each template entry also shows the target audience, such as "Impact/Cultivation Constituents", "Pledge Reminder Transactions", "Newsletter Constituents", and "Other Transactions".

bloomerang << All Search for constituents

Home Constituents Groups Reports **Communications** Emails Letters Forms Tributes Data Tools Settings Kindful

Email Templates Engagement Surveys Delivery Settings New

Search email templates Active Inactive Show more filters

Displaying 1 - 39 of 39 (filtered from 53 email templates)

Sort by date

Education Newsletter Monthly Scheduled for 8/3/2024 at 9:00 AM by margie.worrell Impact/Cultivation Constituents

Pledge Reminder for Next Month Monthly Scheduled for 8/1/2024 at 9:00 AM by margie.worrell Pledge Reminder Transactions

Bloom Center News 10_19_2023 Monthly Scheduled for 8/1/2024 at 8:00 AM by margie.worrell Newsletter Constituents

Recurring Donation Reminder for Next Month Monthly Scheduled for 7/15/2024 at 10:30 AM by margie.worrell Other Transactions

Email home after updates...

The screenshot shows the Bloomerang interface for managing emails. The left sidebar contains navigation options: Home, Constituents, Groups, Reports, Communications (expanded), and Data Tools. Under Communications, the menu items are: Emails, Letters, Forms, Engagement Surveys, and Tributes. A green arrow points to 'Engagement Surveys'.

The main content area is titled 'Emails' and features a search bar, filter buttons (Active, Inactive, Scheduled, Sent), and a 'Show more filters' dropdown. Below this is a table of email records with columns for Name, Frequency, Type, Purpose, Last Mo., and Last Sent. The table lists three emails: 'Jacob Test Email', 'Matt L's Donor Email', and 'Morgan - Test Appeal'. Each row has an 'Action' dropdown menu.

Callouts highlight the following updates:

- More robust and accessible filtering.** (Callout pointing to the filter buttons)
- Engagement Surveys are now on the menu on the left.** (Callout pointing to the 'Engagement Surveys' menu item)
- Cleaner overall look for your previously created emails.** (Callout pointing to the email table)
- "Delete" elevated to Action menu.** (Callout pointing to the 'Delete' option in the Action menu)

The 'Action' menu is expanded, showing options: Edit, Copy, Preview, Deactivate, and Delete.

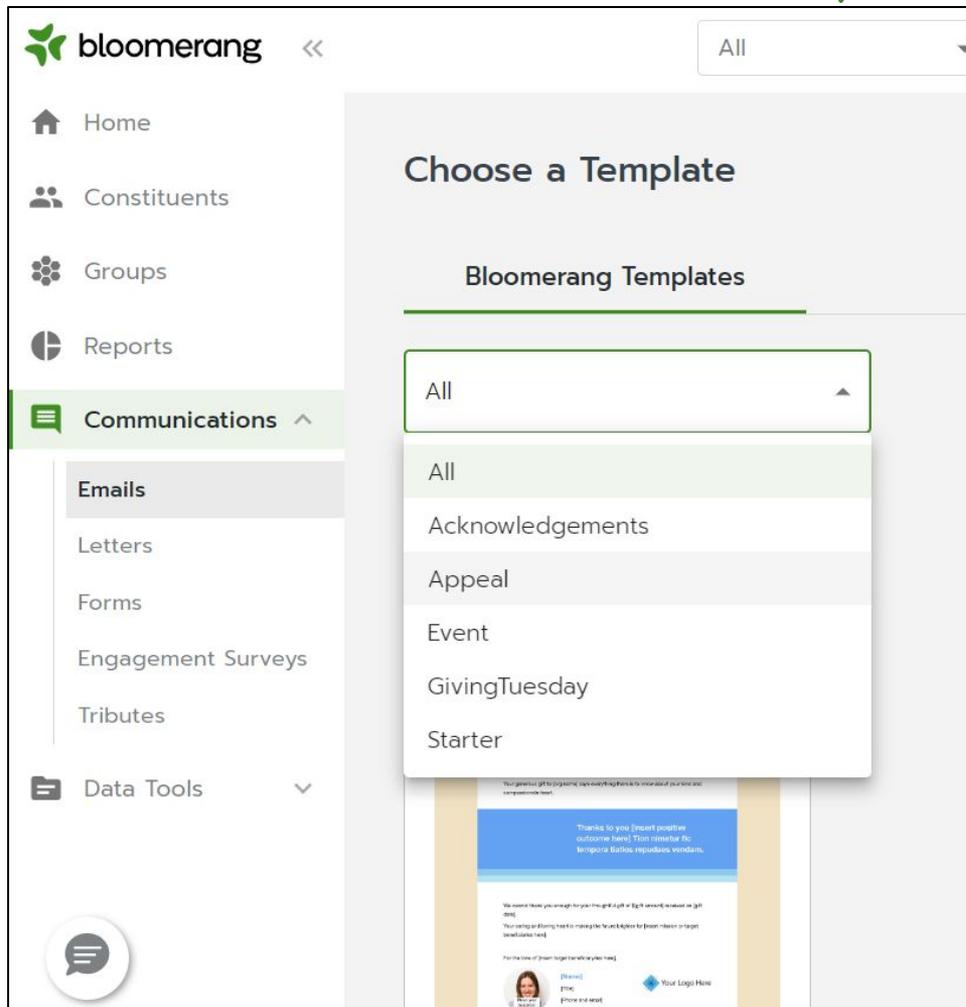
Starting a New Email

New Email

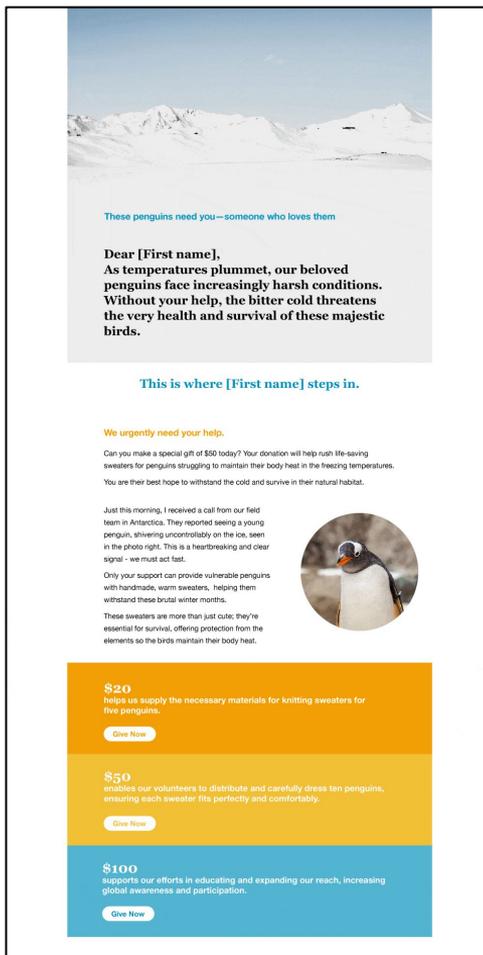
First order of business is to choose a template from our updated template area.

We now align our template types to our purposes of acknowledgement, appeal or event emails. We also have Starter templates which are similar to the templates we had previously.

If you select All, you will see all templates available.



New Refreshed Templates



The email template features a header image of a snowy mountain range. Below the image is a blue link: "These penguins need you—someone who loves them". The main body text reads: "Dear [First name], As temperatures plummet, our beloved penguins face increasingly harsh conditions. Without your help, the bitter cold threatens the very health and survival of these majestic birds." This is followed by a blue link: "This is where [First name] steps in." Below this is a section titled "We urgently need your help." with a paragraph asking for a \$50 donation. To the right of this text is a circular image of a penguin. Below the donation request is a testimonial: "Just this morning, I received a call from our field team in Antarctica. They reported seeing a young penguin, shivering uncontrollably on the ice, seen in the photo right. This is a heartbreaking and clear signal - we must act fast." Below the testimonial is another paragraph: "Only your support can provide vulnerable penguins with handknits, warm sweaters, helping them withstand these brutal winter months." This is followed by another paragraph: "These sweaters are more than just cute; they're essential for survival, offering protection from the elements so the birds maintain their body heat." At the bottom of the template are three donation options, each with a "Give Now" button: "\$20 helps us supply the necessary materials for knitting sweaters for five penguins.", "\$50 enables our volunteers to distribute and carefully dress ten penguins, ensuring each sweater fits perfectly and comfortably.", and "\$100 supports our efforts in educating and expanding our reach, increasing global awareness and participation."

Fresh Library of Email Templates!

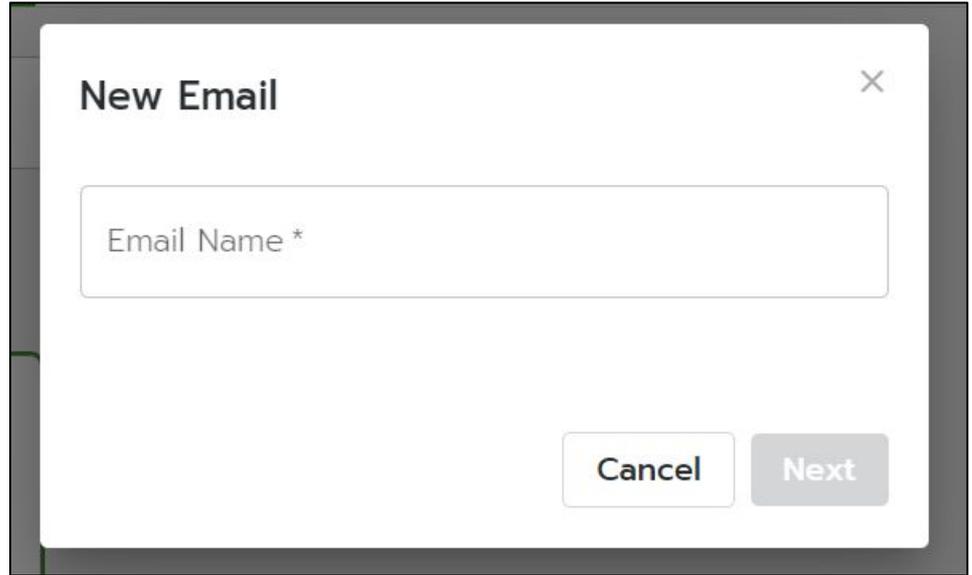
Professionally designed using donor psychology principles and best practices, these templates include sample content to kickstart your fundraising campaigns and maximize donor engagement.

Easily brand them with your organization's colors and logo. Built with accessibility in mind, they ensure a great experience for users of all abilities. Plus, mobile optimization guarantees a flawless display on any device.

Check out [Creating Emails Part 2](#) for design content!

Next you will name your email

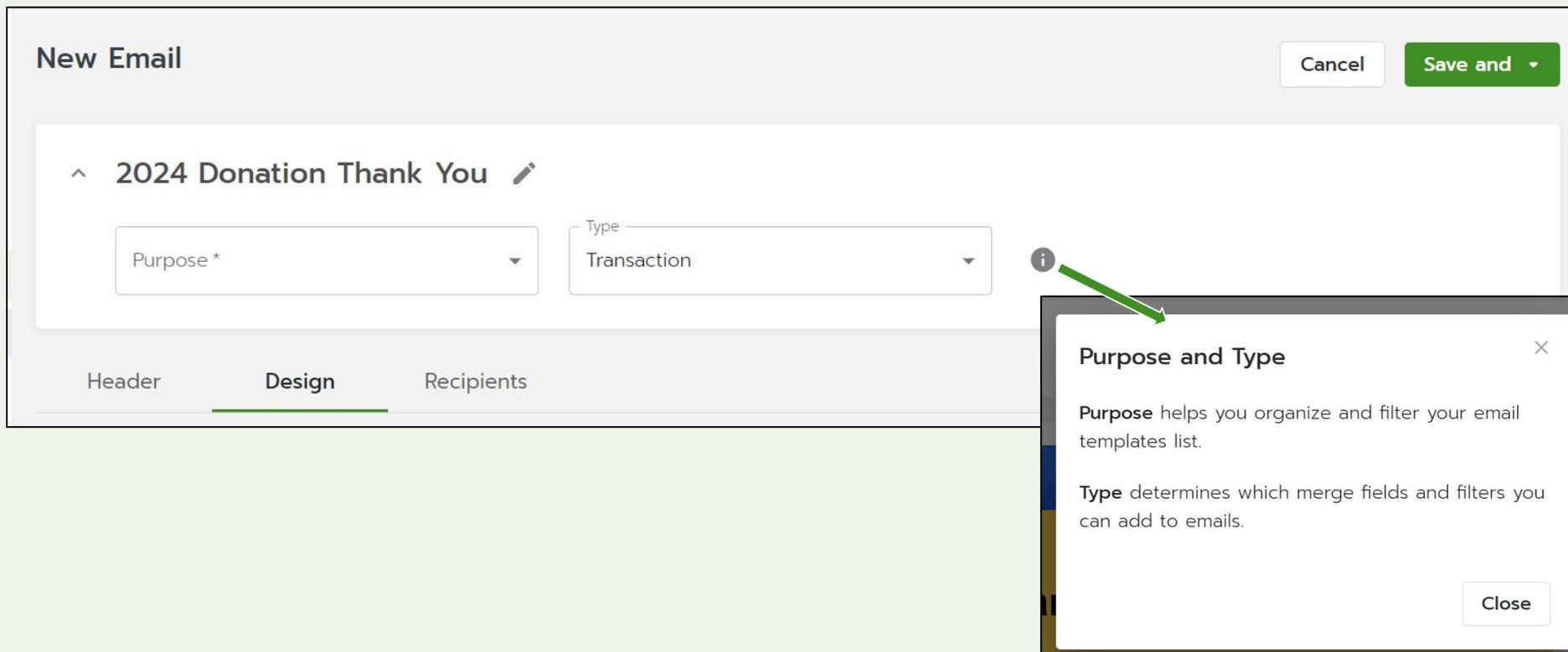
Similar to our past structure, this name will be used on your email list and will only be seen internally.



A screenshot of a 'New Email' dialog box. The dialog has a title bar with 'New Email' and a close button (X) in the top right corner. Below the title bar is a text input field with the placeholder text 'Email Name *'. At the bottom right of the dialog are two buttons: 'Cancel' and 'Next'.

Add your Purpose and Type

This is now pulled into the Design tab area



New Email Cancel Save and ▾

^ 2024 Donation Thank You ✎

Purpose* ▾ Type Transaction ▾

Header **Design** Recipients

Purpose and Type ✕

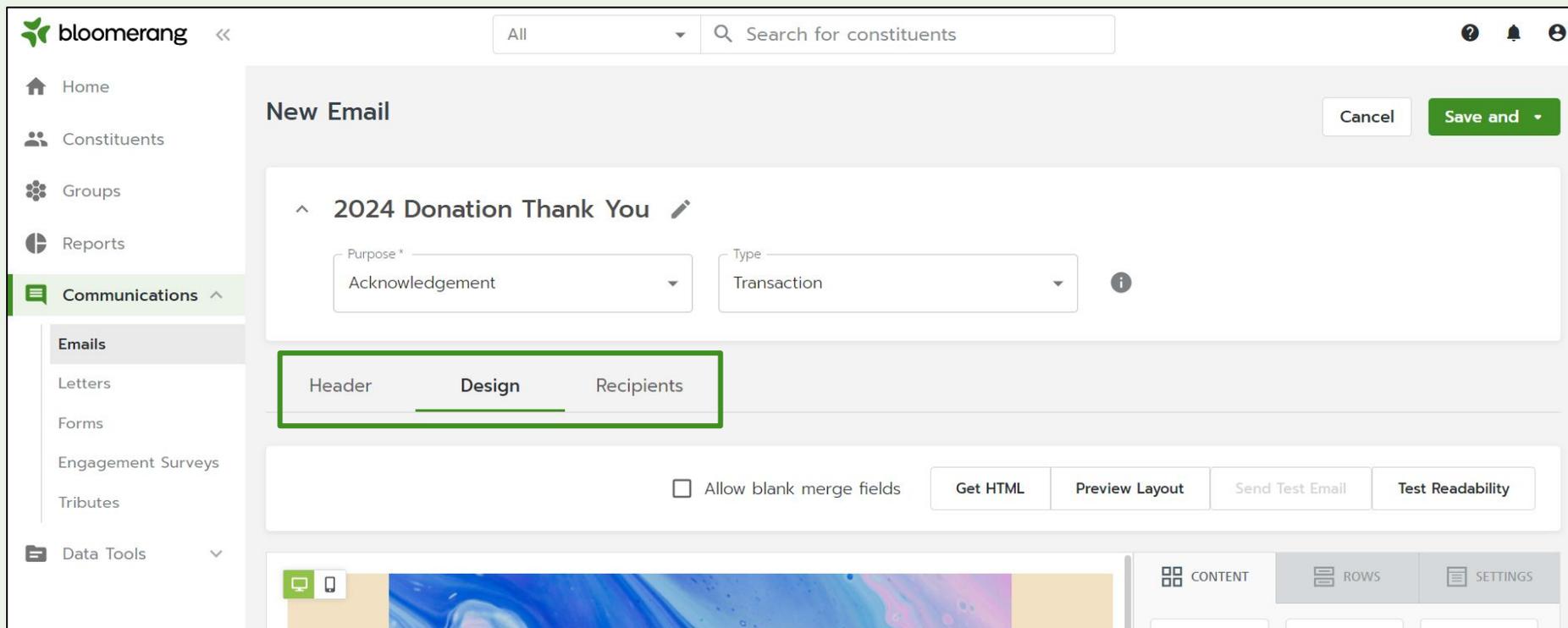
Purpose helps you organize and filter your email templates list.

Type determines which merge fields and filters you can add to emails.

Close

Tabs help you create and send your email

We will explore these in the demo portion! Let's check out **Design Updates**.



The screenshot displays the Bloomerang user interface for creating a new email. On the left is a navigation sidebar with options: Home, Constituents, Groups, Reports, Communications (highlighted), Emails, Letters, Forms, Engagement Surveys, Tributes, and Data Tools. The main content area is titled "New Email" and features a "Cancel" button and a "Save and" button with a dropdown arrow. Below the title is a card for the email titled "2024 Donation Thank You" with an edit icon. This card contains two dropdown menus: "Purpose *" set to "Acknowledgement" and "Type" set to "Transaction". Below the card are three tabs: "Header", "Design" (highlighted with a green box), and "Recipients". At the bottom of the card area, there is a checkbox for "Allow blank merge fields" and four buttons: "Get HTML", "Preview Layout", "Send Test Email", and "Test Readability". The bottom of the interface shows a preview area with a blue and purple abstract image, and a control bar with "CONTENT", "ROWS", and "SETTINGS" tabs.

New look for merge fields

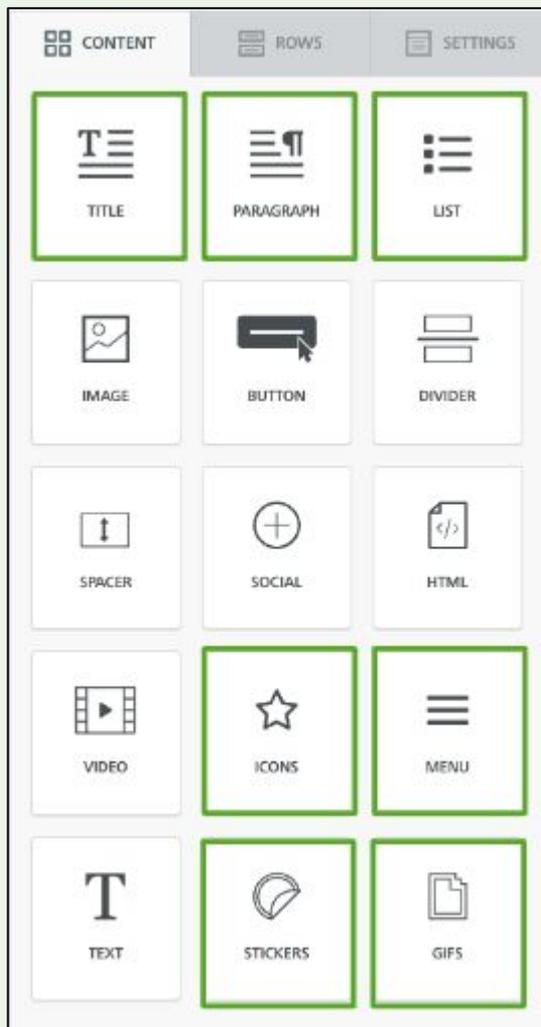
Before...

Hi, `*{{Informal Name}}*`, friend of Bloom Community Center!
[Visit our website](#) | [Get involved](#) | [More about our programs](#) | [In the news](#) | [Donate now](#)

Descriptive merge fields replace intimidating code with simple, human language. Highlighting makes them easy to spot, and you can select, replace, and style them in a single click. Plus, you can preview your email with sample content.

After...

You amaze me, **First Name**



Seven new content blocks

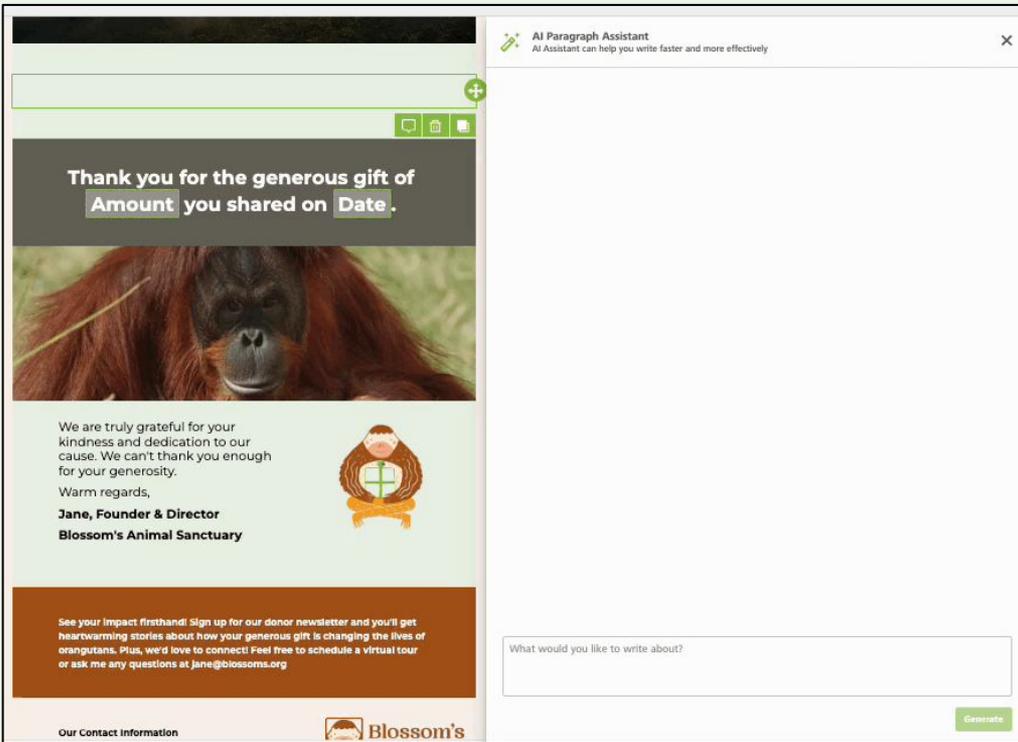
Seven additional content blocks expand your options for creating eye-catching emails. Take your email designs beyond basic text and images and drag and drop your way to more engaging content that readers can't resist.

Gives you more ways to control your content.

1. Title
2. Paragraph (replaces Text block)*
3. List
4. Menu
5. Icons
6. Stickers
7. Gifs

***PRO TIP:** The Text block does not have robust AI functionality, so we recommend using the new paragraph block instead.

AI Content Assistant



The screenshot shows an email editor interface. On the left is a preview of an email draft for Blossom's Animal Sanctuary. The draft includes a thank-you message for a donation, a photo of an orangutan, and a signature from Jane, Founder & Director. At the bottom of the draft is a call to action to sign up for a newsletter. On the right is the 'AI Paragraph Assistant' sidebar, which has a close button (X) and a sub-header 'AI Assistant can help you write faster and more effectively'. Below this is a large text input area with the placeholder text 'What would you like to write about?' and a green 'Generate' button at the bottom right.

Thank you for the generous gift of
Amount you shared on **Date**.

We are truly grateful for your kindness and dedication to our cause. We can't thank you enough for your generosity.

Warm regards,
Jane, Founder & Director
Blossom's Animal Sanctuary

See your impact firsthand! Sign up for our donor newsletter and you'll get heartwarming stories about how your generous gift is changing the lives of orangutans. Plus, we'd love to connect! Feel free to schedule a virtual tour or ask me any questions at jane@blossoms.org

Our Contact Information  **Blossom's**

AI Paragraph Assistant
AI Assistant can help you write faster and more effectively

What would you like to write about?

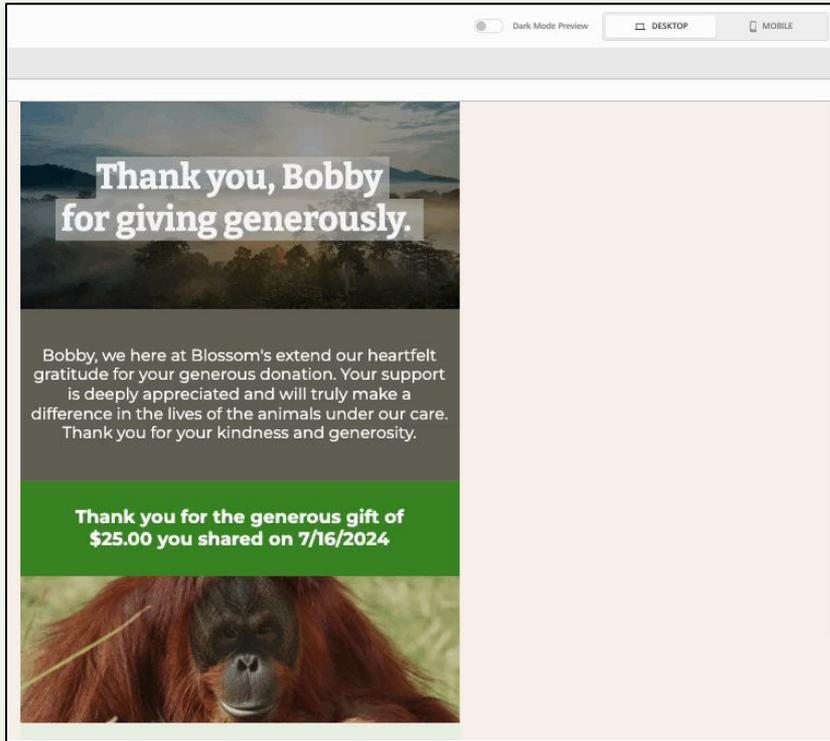
Generate

Don't let writer's block slow you down.

Write like a pro with less effort. Our new AI feature is built-in right where you need it to help you write engaging emails in record time. Think of it as your idea-generator, copywriter, and proofreader all in one.

Our AI feature makes it easy to optimize your writing with pre-built prompts OR you can enter your own prompts - all that you can choose to apply.

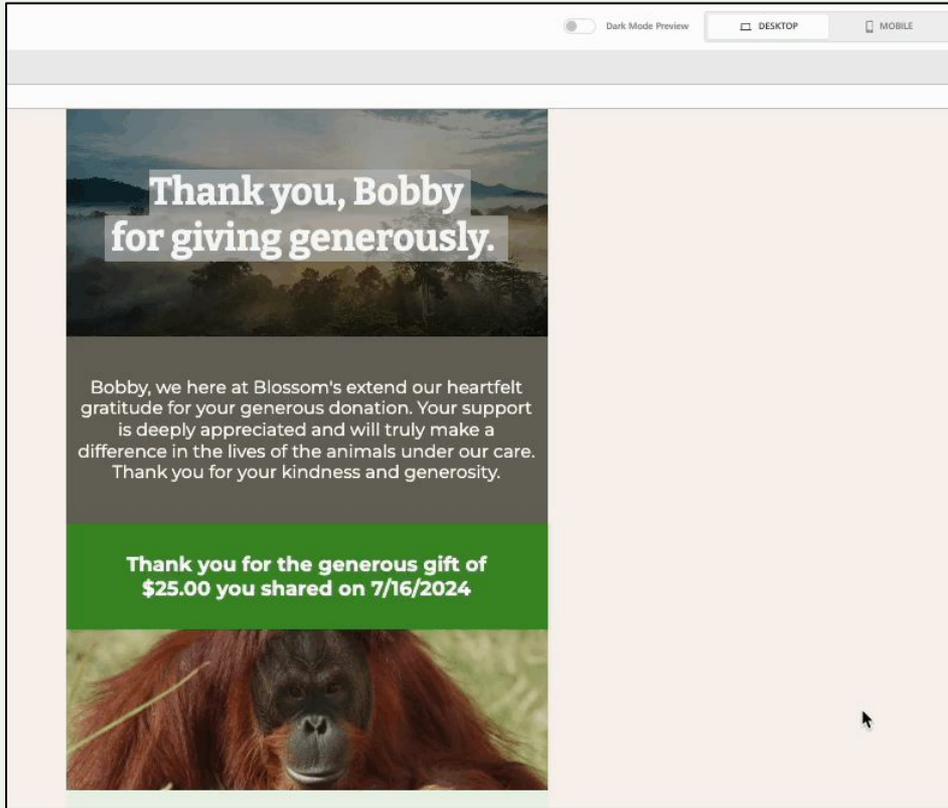
Mobile Design Mode



Ensure emails look great on both desktop and mobile devices with ease while editing.

Customize layouts, adjust content, and perfect your design effortlessly from any device, ensuring your emails look great on both desktop and mobile.

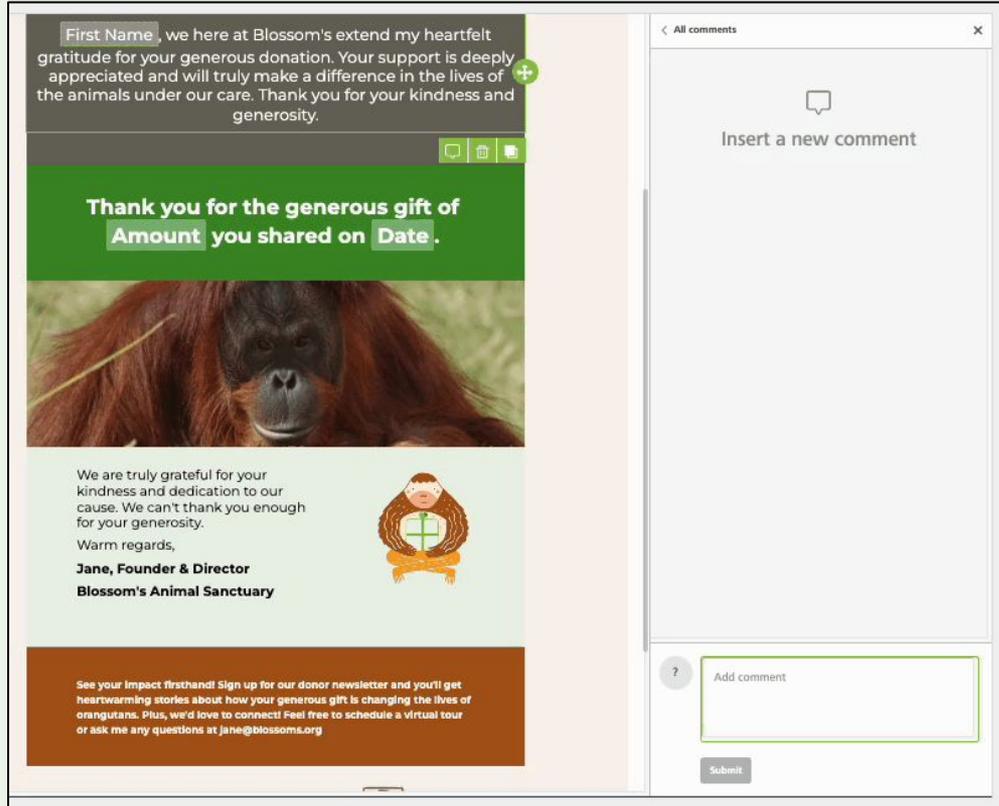
Dark Mode Preview



We added a new '**dark mode preview**' toggle so you can see how designs will look on devices with dark mode enabled.

This helps ensure users who prefer dark mode on their desktop and mobile devices can read the emails you send with ease, including enhanced accessibility for users with visual impairments.

Commenting



The screenshot shows an email interface with a main content area on the left and a commenting sidebar on the right.

Main Content Area:

- Text: "First Name, we here at Blossom's extend my heartfelt gratitude for your generous donation. Your support is deeply appreciated and will truly make a difference in the lives of the animals under our care. Thank you for your kindness and generosity." (A green plus icon is visible to the right of this text.)
- Text: "Thank you for the generous gift of Amount you shared on Date." (The words "Amount" and "Date" are highlighted in green boxes.)
- Image: A photograph of an orangutan.
- Text: "We are truly grateful for your kindness and dedication to our cause. We can't thank you enough for your generosity. Warm regards, Jane, Founder & Director Blossom's Animal Sanctuary" (A small cartoon character icon is to the right of the signature.)
- Text: "See your impact firsthand! Sign up for our donor newsletter and you'll get heartwarming stories about how your generous gift is changing the lives of orangutans. Plus, we'd love to connect! Feel free to schedule a virtual tour or ask me any questions at jane@blossoms.org"

Commenting Sidebar:

- Header: "All comments" with a close button (X).
- Text: "Insert a new comment" with a comment icon above it.
- Form: A text input field with a question mark icon to its left, containing the placeholder text "Add comment".
- Button: A "Submit" button below the input field.

Collaborate on email. Teammates can leave comments and suggestions right there. Discuss changes, approvals, and ideas – all on the design itself. This keeps everyone informed, even during handoffs or with new team members. Faster reviews, smoother workflow, and saved time.

Row Styling

Row styling options empower you with the design principles of the pros, giving you total control over backgrounds, borders, and column formatting to achieve pixel-perfect layouts on any device while saving you hours of design time.

- **Backgrounds:** Choose row colors or images and the content area within it.
- **Borders:** Add borders or soften the edges of your content area for a touch of style.
- **Layout:** Control how your content is positioned within the row, including vertical alignment.
- **Mobile Optimization:** Fine-tune how your row appears on mobile devices. You can choose to hide it entirely on mobile, reverse the order of content blocks, or prevent content from stacking.
- **Column Structure:** If your row uses columns, you can adjust their background, padding, and borders.
- **Content alignment:** Perfectly align content position to the top, middle or bottom of the row.

Ten new web-safe fonts

EB Garamond

1. Playfair Display
2. EB Garamond
3. Oswald
4. Poppins
5. Inter
6. Raleway
7. Pacifico
8. Nunito Sans
9. Merriweather Sans
10. Whisper

Now there are 10 new fonts to give you more options.

Web-safe fonts render consistently across platforms, ensuring your email looks exactly as you designed it.

Background image

CONTENT ROWS SETTINGS

GENERAL OPTIONS

Content area width 900px

Content area alignment LEFT **CENTER**

Background color #283C4B

Content area background color #283C4B

Background image

Choose image

Url

Fit to background | Repeat | Center

Background image support varies across email clients. Choose a fallback content area background color for optimal results.

Default font Arial

Link color #0000FF

Background image

Choose image

Url

Fit to background | Repeat | Center

Background image support varies across email clients. Choose a fallback content area background color for optimal results.

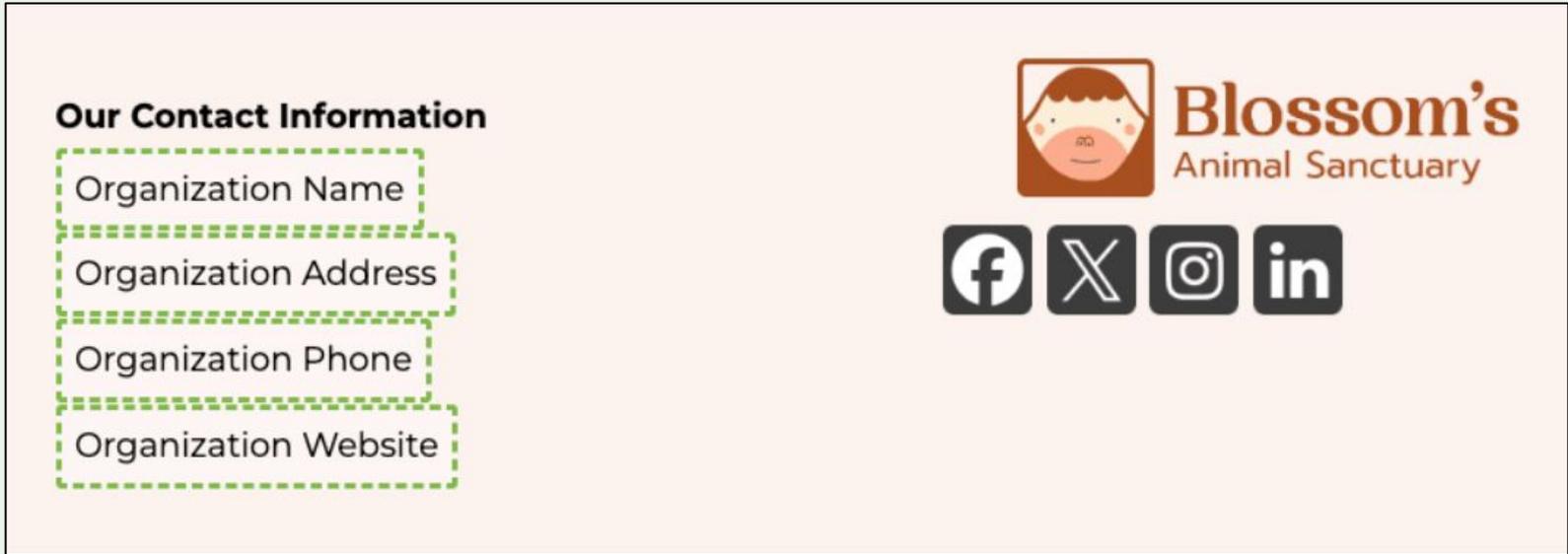
Add a background image to your email design for optimal visual appeal without the struggle of getting it just right.

Simply upload the image you want, size it for a perfect fit, and apply effects to create a unique visual style. These enhancements make it easy to create unique, engaging designs while ensuring a time-saving, efficient process.

Editable Contact Us block

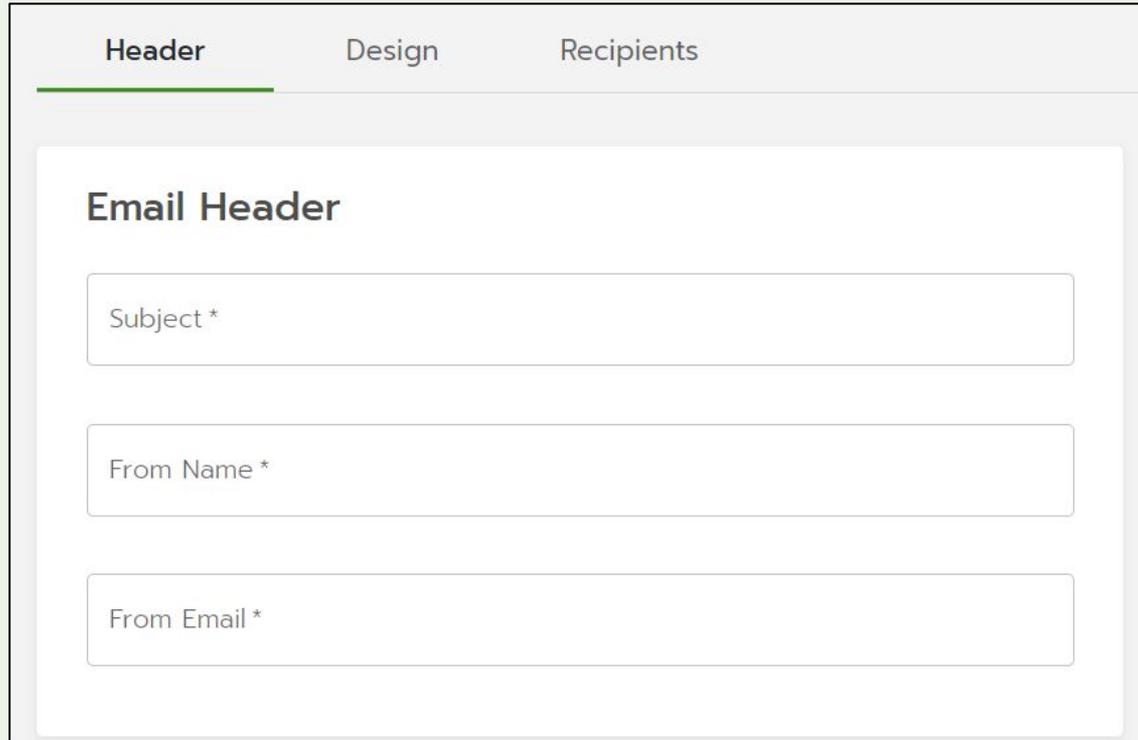
Now you can edit your email's Contact Us block with contact information and location-specific details, while maintaining a consistent brand look.

It also supports Can-Spam compliance, reminding you to ensure your emails are legitimate and transparent with clear unsubscribe options.



Header: What your reader will see

Add your Subject, From Name and From Email here.



The screenshot shows a web interface for configuring an email header. At the top, there are three tabs: "Header", "Design", and "Recipients". The "Header" tab is selected and highlighted with a green underline. Below the tabs, the main content area is titled "Email Header". It contains three input fields, each with a label and an asterisk indicating it is required:

- Subject *
- From Name *
- From Email *

Recipients: Filtering for your recipients

Email Interests is embedded here since it impacts who this message will go to

New Email

Cancel Save and ▾

2024 Donation Thank You ✎

Header Design **Recipients**

Select email interests and add filters to build your recipient list.

Email Interests

Constituents appear in the recipient list if they're subscribed to any email interests you select.

- Event
- Newsletter
- Volunteer Information

If you add filters, only subscribed constituents who match these filters appear in the recipient list. The complete recipient list appears only after you select Save and Preview.

Transaction Filters

Include Add filter...

Exclude Has a Specific Constituent And

OR

Type is 'Soft Credit' And

Or

917 transactions found (last run an hour ago) Refresh

Name	Primary Email Address	Date	Amount	Type	Email Interest Type	Email Interests
TOTALS			\$849,775.00			

Into the Demo Database we go!

Resources

Knowledgebase

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

[Set Up Required Authentication Settings for Bloomerang Emails](#)

[Monitor Your Spam Complaint Rate](#)

[Create and Preview Emails](#)

[Edit Administrative Settings for Emails](#)

[Filter Emails](#)

[View and Manage Emails](#)

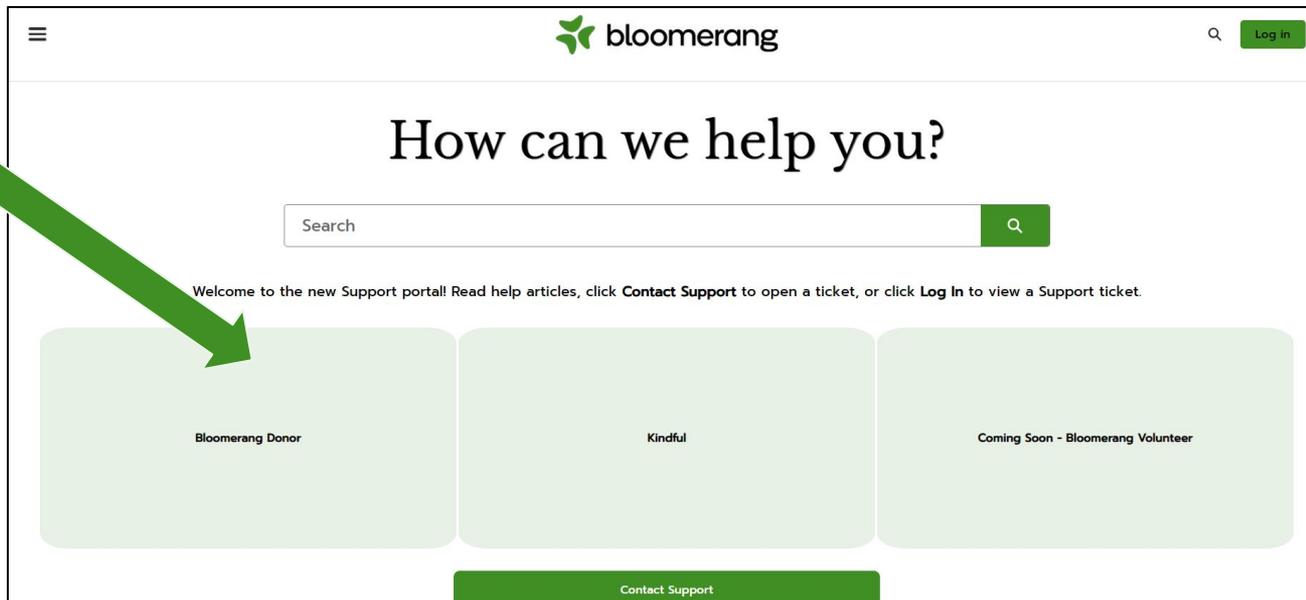
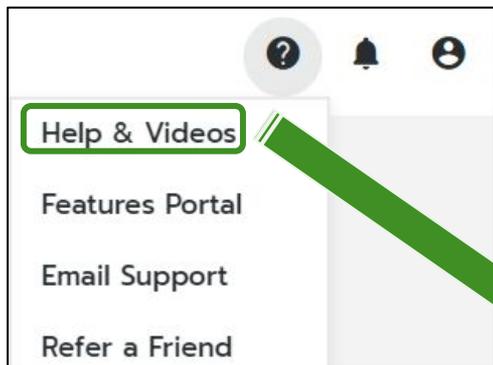
[Email Interests](#)

[Send or Schedule Emails](#)

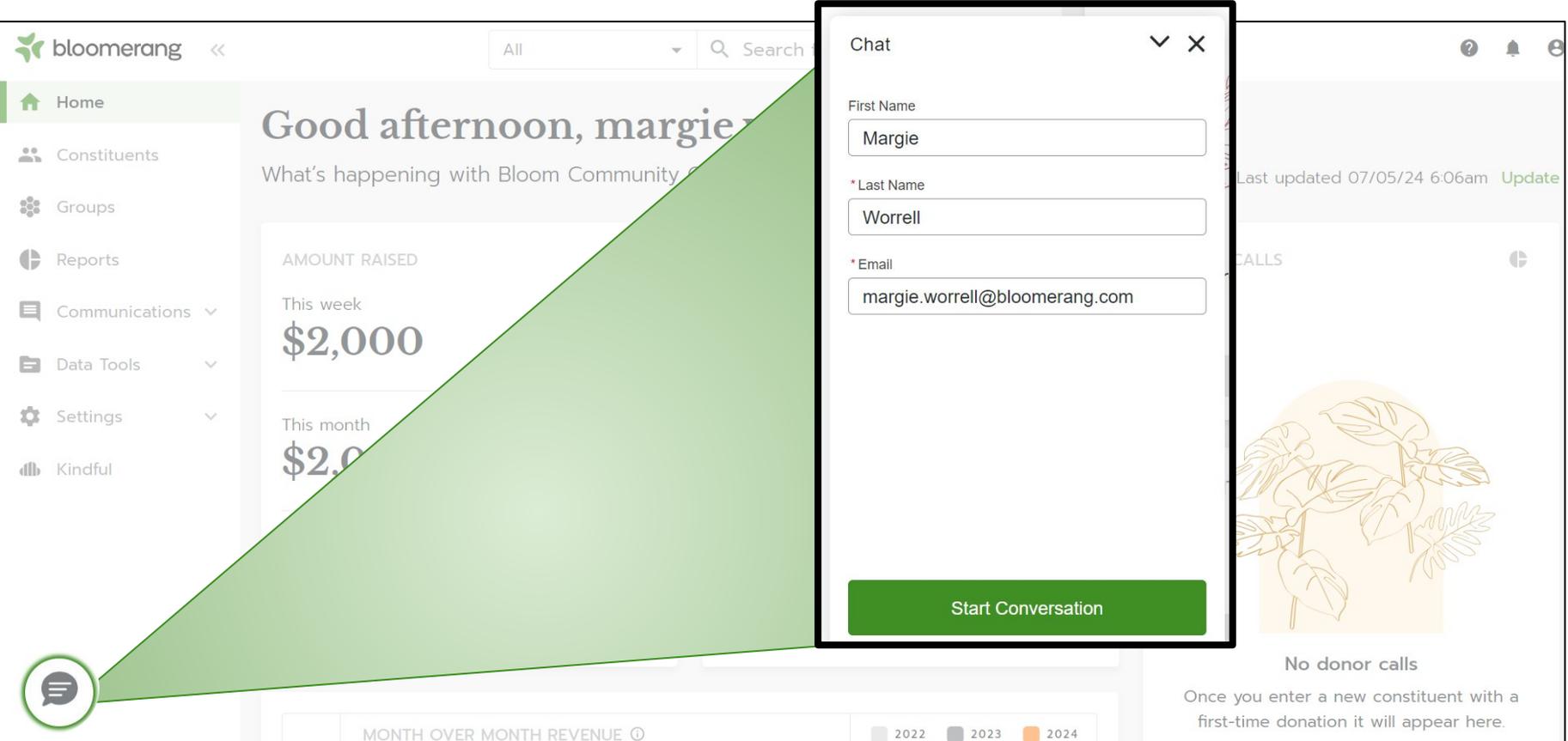


Resources

Bloomerang Knowledgebase and Support Portal



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" (filled with "Margie"), "*Last Name" (filled with "Worrell"), and "*Email" (filled with "margie.worrell@bloomerang.com"). A green "Start Conversation" button is at the bottom of the chat window. Below the chat window, there is a section titled "No donor calls" with a note: "Once you enter a new constituent with a first-time donation it will appear here." A decorative illustration of a plant is also present in this section.

Home

Constituents

Groups

Reports

Communications

Data Tools

Settings

Kindful

Good afternoon, margie

What's happening with Bloom Community

AMOUNT RAISED

This week
\$2,000

This month
\$2,000

Search

All

Chat

First Name
Margie

*Last Name
Worrell

*Email
margie.worrell@bloomerang.com

Start Conversation

CALLS

No donor calls

Once you enter a new constituent with a first-time donation it will appear here.



Thank you for attending!

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