

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

# Welcome to Bloomerang Academy

Thank you for joining us!

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# Housekeeping

**Live Transcript**

We all know what we want to do is spend  
administration and more time Doing the v

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Chat



Raise Hand



Q&A



Live Transcript

**Share ideas**

**Ask questions**

# Housekeeping

The resources mentioned in the session will be linked on the Resources slide at the end of this presentation.

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](mailto:support@bloomerang.com). Our support team is amazing!

# Bloomerang Automations: Zapier 101



 **zapier**

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# Agenda

1. Zapier intro
2. Zapier vs. native integrations
3. Triggers, actions, and searches
4. Getting started with Zapier



**Have you heard of Zapier?**



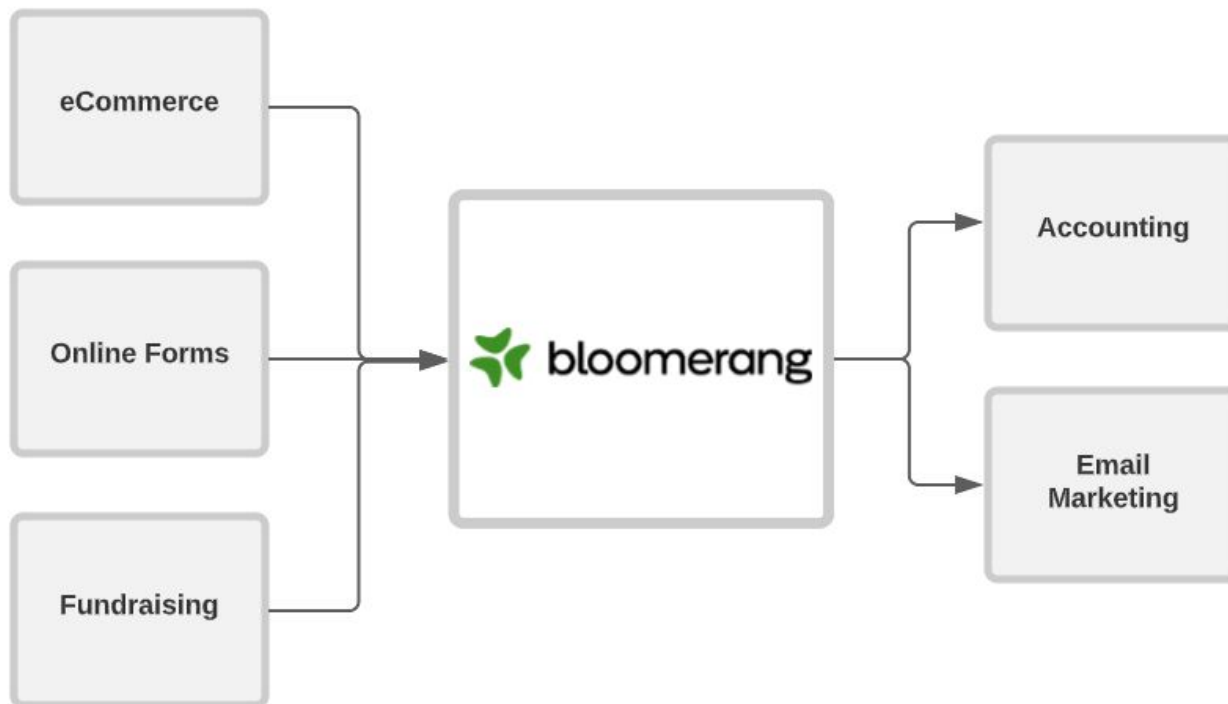
# What is Zapier?

Automation software



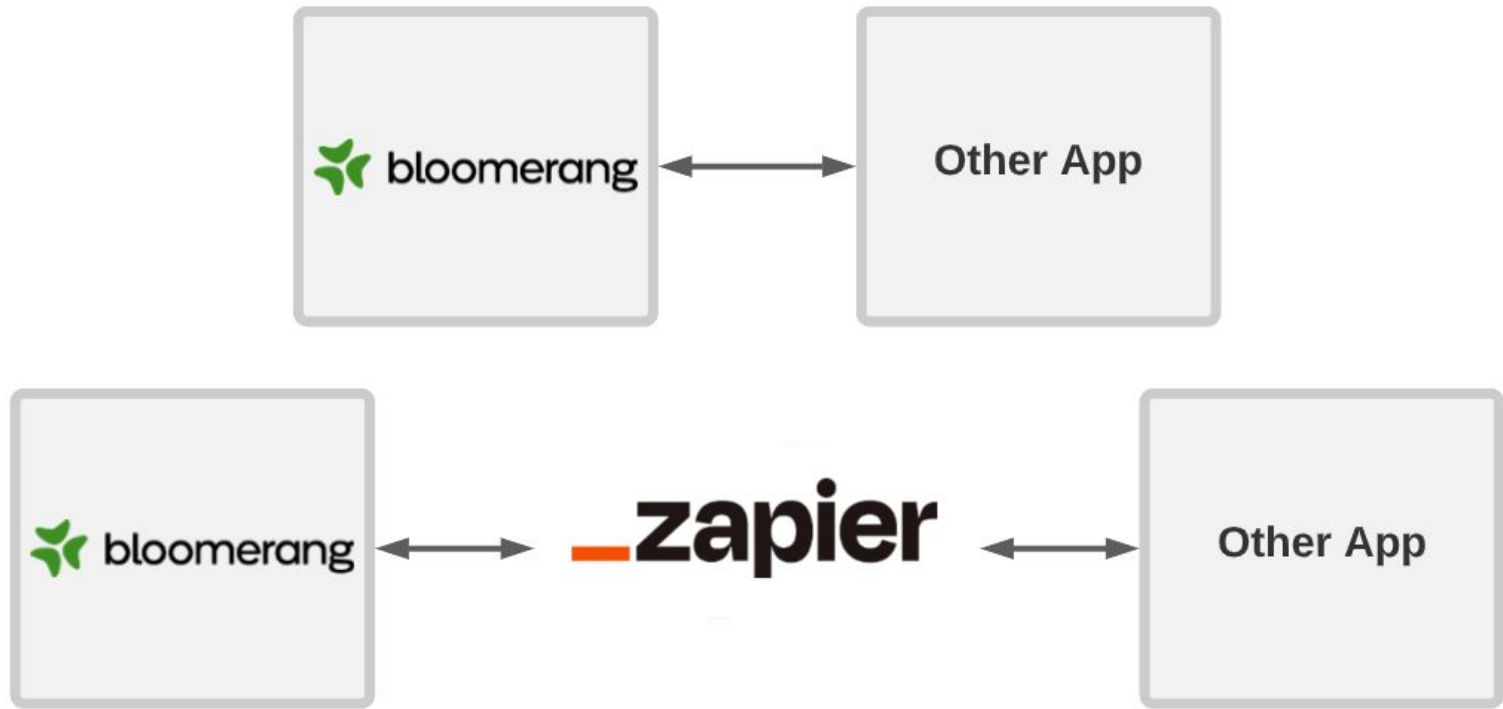
# Why pursue integrations?

Key feature in Bloomerang system and fundraising strategy



# Types of integrations

Zapier vs. native



# Why pursue Zapier integrations?

- No native integration exists
- Native integration does not align with organization's use case
- High level of customization required
- Desired functionality is not provided in native integration
- Multi-app automations

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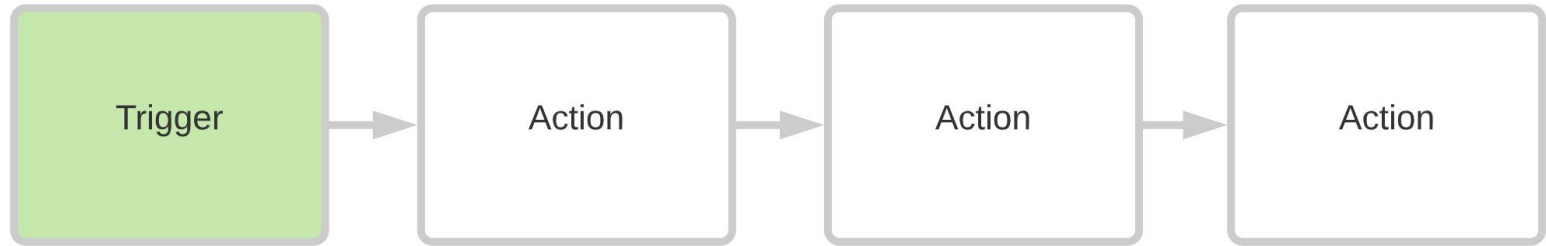
# Zapier Key Concepts

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# Zap

An integration workflow in Zapier that connects one or more apps.

Zaps start with a trigger and then proceed to complete one or more actions.



# Trigger

- A trigger is an event that starts a Zap.
- Triggers are based on data entry events in Bloomerang.
  - New Constituent
  - Updated Constituent
  - New Transaction
  - New Transaction Payment
  - New Interaction

# Action

- An action is an event performed by a Zap after the Zap is triggered.
- An action is a task that creates new records or updates existing records in

Bloomerang.

- Create Constituent
- Update Constituent
- Create Donation
- Create Interaction
- Create Task

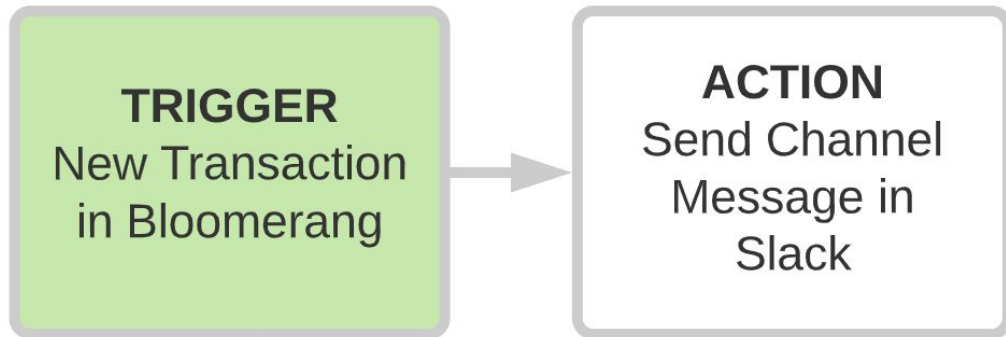


# Search

- A search finds an existing record and in some cases may allow for the creation of a new record if none are found.
  - Find Constituent


# Example Zap









When a transaction greater or equal to \$1,000 is created in Bloomerang, notify my team in Slack.




# Example Zap

← → ↻ 🔒 [crm.bloomerang.co/Constituent/62465/Transaction/Edit/2432204](https://crm.bloomerang.co/Constituent/62465/Transaction/Edit/2432204) ☆ 📁 👤 ⋮

 **bloomerang** ? 🔔 👤



**Jeffrey James Haguewood**  
📍 The Haguewoods  
#315 jeff@sidekicksolutionsllc.com

Address  
123 W Fake Ave.  
Port Angeles, WA 98362

Phone  
Mobile (360) 477-0629

▼

Summary Profile **Timeline** Relationships

**Edit Donation** Actions ▼ Cancel Save

**DATE**  
12/1/2014 📅

**AMOUNT**  
\$1,000.00

**NON-DEDUCTIBLE**  
\$0.00

**FUND**  
Unrestricted ▼

**QUICKBOOKS ACCOUNT**

Soft Credits +

ACKNOWLEDGED?  
No ▼



**Bloomerang** APP 1:12 PM

New transaction from Jeffrey Haguewood in an amount of 1000 to Unrestricted.

<https://crm.bloomerang.co/Constituent/62465/Transaction/Edit/2432204>

Questions?

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# Bloomerang Triggers

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# New Constituent

## Bloomerang trigger

- Triggers when a new constituent is created.
- Filter for:
  - Individuals
  - Organizations
  - Both individuals and organizations

# Updated Constituent

## Bloomerang trigger

- Triggers when an existing constituent is updated.
- Filter for:
  - Individuals
  - Organizations
  - Both individuals and organizations

**Tip:** Updates to the constituent's profile including names, contact information, and custom fields will trigger a Zap to run.

# New Transaction

## Bloomerang trigger

- Triggers when a new transaction is created.
- Filter by:
  - Transaction type
  - Minimum amount
  - Maximum amount

**Tip:** Select "True" to include Giving Summary for Zaps involving a Constituent's cumulative giving.



# New Transaction Payment

## Bloomerang trigger

- Triggers for each donation, pledge payment, and recurring donation when a new transaction is created.

**Tip:** Use this trigger to run a Zap for each payment in a split payment.

# Transaction Scenarios

Bloomerang trigger

Number of trigger events		
	New Transaction	New Transaction Payment
Donation for \$20	1	1
Donation for \$20 with <b>two</b> split payments	1	2
Donation for \$20 with <b>three</b> split payments	1	3

# New Interaction

## Bloomerang trigger

- Triggers when a new interaction is created.
- Filter by:
  - Purpose
  - Channel
  - Both channel and purpose

# New Task

## Bloomerang trigger

- Triggers when a new task is created.
- Filter by:
  - Purpose
  - Channel
  - User
  - Constituent
  - Any combination of the above

Questions?

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# Bloomerang Actions

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# Create Constituent

## Bloomerang action

- Creates a new constituent.
- Can write to standard and custom fields.
- Create the following constituent types:
  - Individuals
  - Organizations

# Update Constituent

## Bloomerang action

- Updates an existing constituent based on a Constituent ID.
- Can write to standard and custom fields.
- This action overwrites existing Bloomerang data in some instances (e.g., names and custom fields).
- Blank fields in Zapier are ignored (do not nullify existing data)

**Tip:** Updating a constituent's address, phone, or email will promote the new info as Primary on constituent's profile.



# Create Donation

## Bloomerang action

- Creates a new donation based on a Constituent ID.
- Can write to standard and custom fields.
- Can create a donation that contains a maximum of 10 split payments.

**Tip:** To create donations for Constituents dynamically, map the Constituent ID from a prior Find (or Create) Constituent step.

# Create Interaction

## Bloomerang action

- Creates a new interaction based on a Constituent ID.
- Can write to standard and custom fields.

**Tip:** To create interactions for Constituents dynamically, map the Constituent ID from a prior Find (or Create) Constituent step.

# Create Task

## Bloomerang action

- Creates a new task assigned to a user.
- Can optionally link the task to a constituent.

**Tip:** To create tasks for Constituents dynamically, map the Constituent ID from a prior Find (or Create) Constituent step.

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# Bloomerang Searches

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# Find Constituent

## Bloomerang search

- Find a constituent by name and at least one of address, phone, or email.
- Optionally, create a constituent if none are found.

# Getting started

# Sign up for a Zapier account

<https://zapier.com/sign-up>

**Tip:** Zapier begins with a 14-day free trial. Following the free trial, your plan is converted to a Free plan until you choose to upgrade, if at all.

# Connect Bloomerang to Zapier

- Go to My Apps
- Click Add Connection
- Search for and select Bloomerang
- Grant access using your Bloomerang login credentials



# Explore Zapier

- Search available apps
  - <https://zapier.com/apps>
- Look at Bloomerang Zap templates
  - <https://zapier.com/apps/bloomerang/integrations>
- Review Zapier resources
  - <https://zapier.com/help>
- Begin building!

**Would you like a follow-up  
about consulting services?**



Zapier integration experts working exclusively with nonprofits and public sector agencies.

[\*\*www.SidekickSolutionsLLC.com\*\*](http://www.SidekickSolutionsLLC.com)

[\*\*info@sidekicksolutionsllc.com\*\*](mailto:info@sidekicksolutionsllc.com)



**Thank you**