

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.

+1 669 900 6833

Join the Online Audio or Dial in!



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

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. Our support team is amazing!

Automating Stewardship Tasks



 **zapier**

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Agenda

1. Intro to Zapier
2. Automation creation of tasks
3. Reports to monitor task status
4. Getting started



Zapier

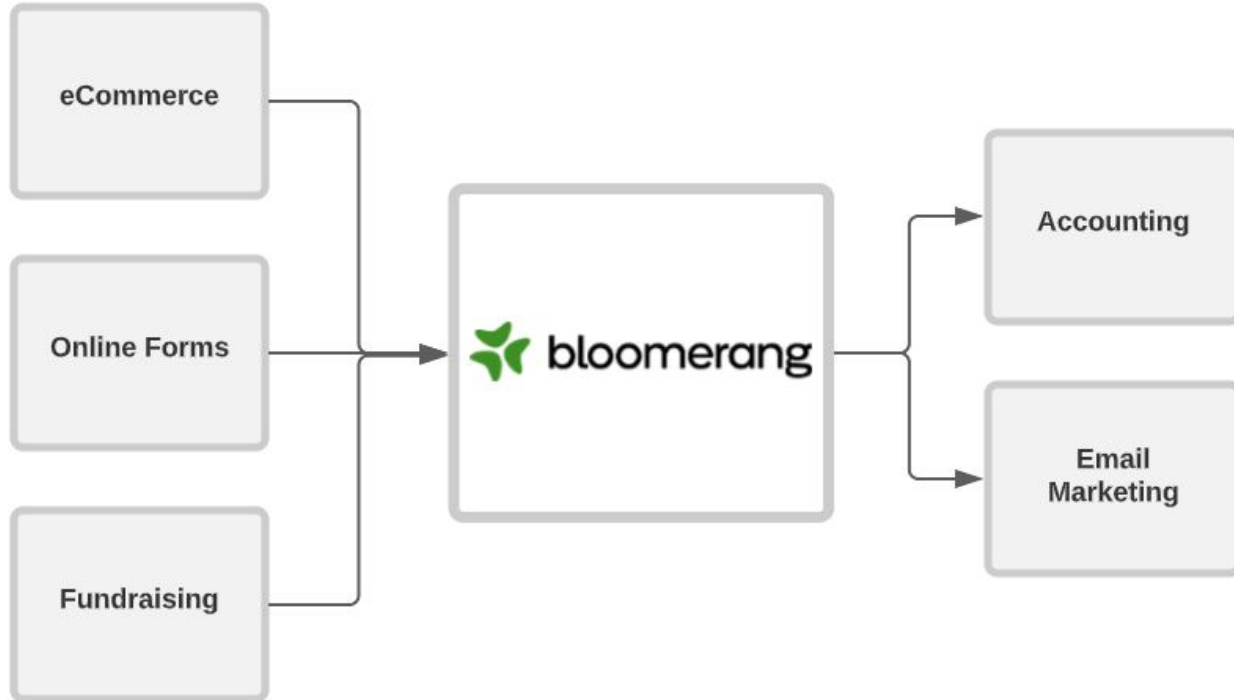


What is Zapier?

Automation software



Bloomerang is central hub



**Do you currently have any
Zapier integrations?**

Stewardship tasks



Donation levels

Assign a different follow-up task action based on the amount of a new donation.



Trigger

Donation levels

1. New Transaction in Bloomerang

App & event ✓ Account ✓ **Trigger ✓** Test ✓

Generate values **Beta** Field search Refresh

Type
Choose value...

Minimum Amount 1.0
500

Maximum Amount 1.0
999.99

Include Constituent's cumulative giving history?
Choose value...

Select "True" to get the Constituent's 10-year giving history, average giving, lifetime giving, and first, last, and largest transactions.

Include Constituent's Household information?
Choose value...

Select "True" to get the Constituent's Household names, status, and engagement score.

1. New Transaction in Bloomerang

App & event ✓ Account ✓ **Trigger ✓** Test ✓

Generate values **Beta** Field search Refresh

Type
Choose value...

Minimum Amount 1.0
1000

Maximum Amount 1.0
Enter text...

Include Constituent's cumulative giving history?
Choose value...


Select "True" to get the Constituent's 10-year giving history, average giving, lifetime giving, and first, last, and largest transactions.





Include Constituent's Household information?
Choose value...

Select "True" to get the Constituent's Household names, status, and engagement score.

Create Task

Donation Levels

 2. Create Task in Bloomerang
✎ ✕

App & event 
Account 
Action 
Test 

Constituent 1 2 3

⇩
Or add search step

To create tasks for Constituents dynamically, choose Custom to map the ID from a Find Constituent step.



* Channel (required)

Mail

* User 1 2 3 (required)

Jeff Haguewood

To assign tasks dynamically, choose Custom to map the ID of the user from a prior step; otherwise select a single user from the list.

* Due Date   (required)

+3d




* Subject (required)


Handwritten Thank You


Purpose



Acknowledgement


Note


 1. Constituent Full Name: Stormie Gilchrist | gave \$  1. Amount: 600 | on  1. Date: 2023-02-13 | to





 1. Designations Campaign Name: ,,2014 Annual Campaign |.

Send a handwritten thank you card to:  1. Constituent Primary Address Street: *No data*

 1. Constituent Primary Address City: Port Angeles |  1. Constituent Primary Address State Abbreviation: WA

 1. Constituent Primary Address City: Port Angeles

 2. Create Task in Bloomerang
✎ ✕

App & event 
Account 
Action 
Test 

Constituent 1 2 3

⇩
Or add search step

To create tasks for Constituents dynamically, choose Custom to map the ID from a Find Constituent step.



* Channel (required)

Phone

* User 1 2 3 (required)

Jeff Haguewood

To assign tasks dynamically, choose Custom to map the ID of the user from a prior step; otherwise select a single user from the list.

* Due Date   (required)

+3d




* Subject (required)


Major Donor Personal Call



Purpose

Acknowledgement

Note

 1. Constituent Full Name: Stormie Gilchrist | gave \$  1. Amount: 600 | on  1. Date: 2023-02-13 | to

 1. Designations Campaign Name: ,,2014 Annual Campaign |.

Call the donor at  1. Constituent Primary Phone Number: +15039084929 | ( 1. Constituent Primary Phone Type: Mobile)

to acknowledge the gift.

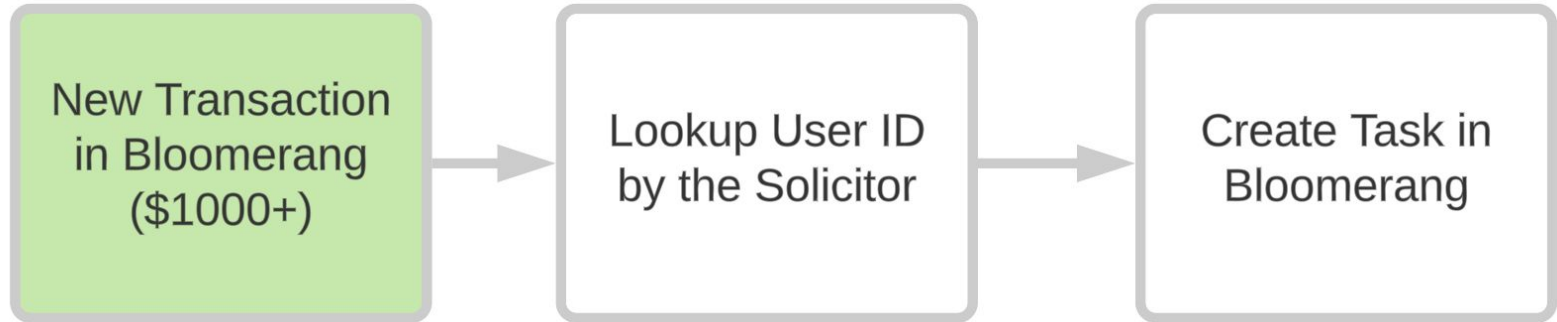
Lookup tables

Zapier Key Concept

- Convert data from source app to the target value
- Formatter by Zapier
 - Provides line-item support
 - Lookup returns single value
 - Can assign a fallback value

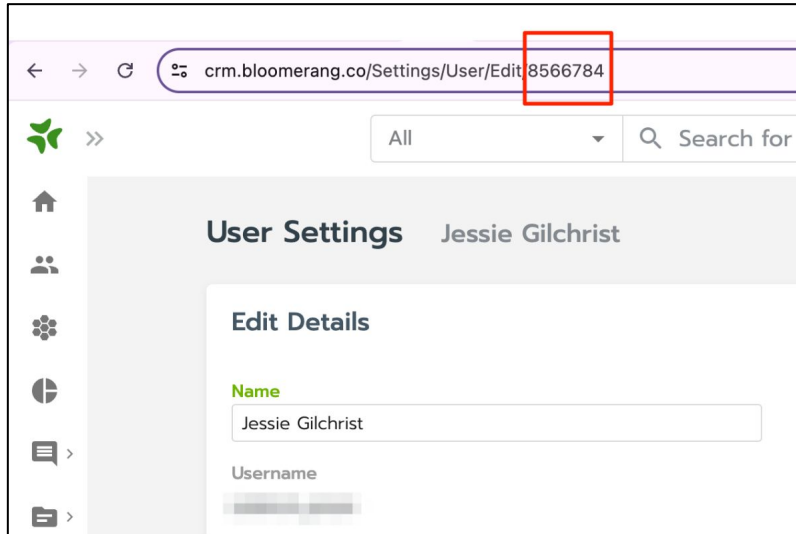
Dynamic coding

By adding a Formatter by Zapier lookup step, we can dynamically code the User based on the Solicitor.



Lookup

Dynamic coding



3. Lookup User ID ✎ ✕

App & event ✔
Action ✔
Test ✔

Generate values Beta
Field search
Refresh

* Transform (required)

Lookup Table ↕

i Given a key and table - find the matching value.

Values

Lookup Key

✎ 1. Constituent Solicitor: Jason Oliver

Value you would like to lookup.

Lookup Table	
Jeff Haguewood	10240 ✕
Ally Seidel	2527232 ✕
Jessie Gilchrist	8566784 ✕
+	

The table that will be used for the lookup - keys on the left and values on the right.

Fallback Value

8566784

The value to be used if we do not find a matching value in Lookup Table.

Create Task

Dynamic coding

4. Create Task in Bloomerang ✎ ✕

App & event Account **Action** Test

[Generate values](#) **Beta** [Field search](#) [Refresh](#)

Constituent 1 2 3

🌱 1. Constituent Id: 3172353 ⌵ [Or add search step](#)

To create tasks for Constituents dynamically, choose Custom to map the ID from a Find Constituent step.

* Channel (required)

Other ⌵

* User 1 2 3 (required)

🔗 3. Output: 8566784 ⌵

To assign tasks dynamically, choose Custom to map the ID of the user from a prior step; otherwise select a single user from the list.

* Due Date (required)

+3d

Reporting

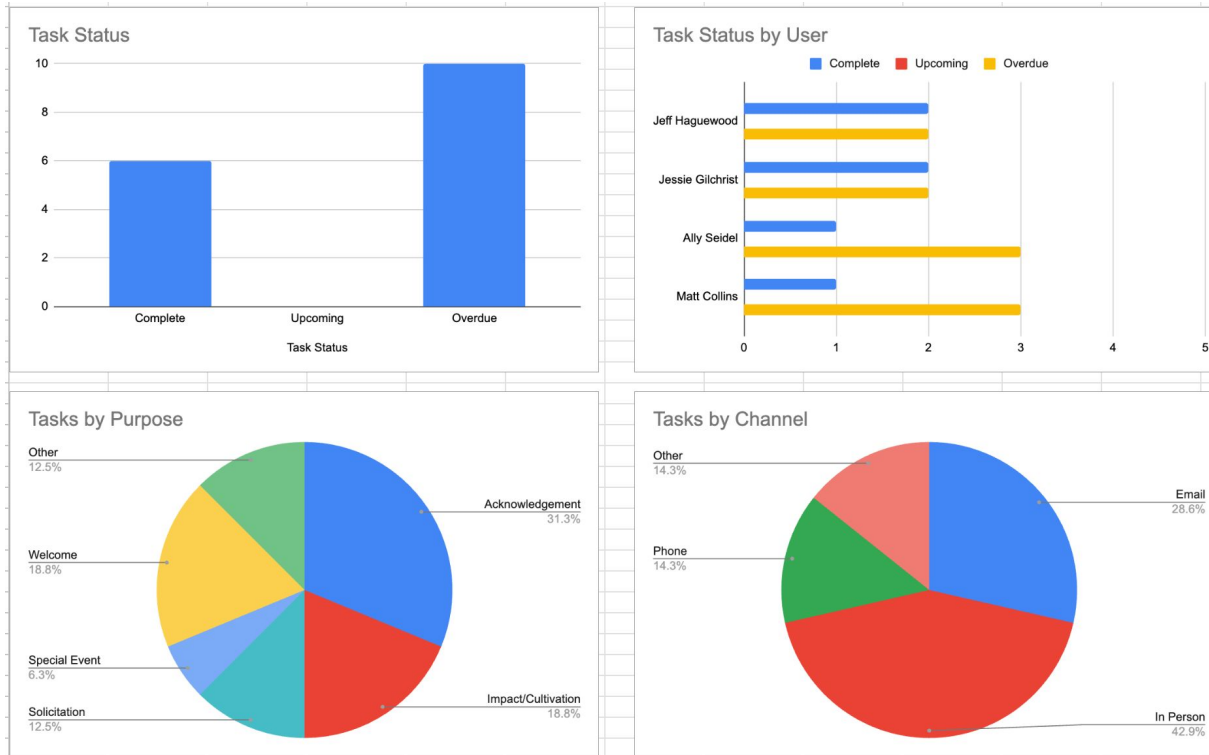


Reporting

- Native Bloomerang reports
 - Overdue tasks by User
 - Tasks due this week
 - Tasks completed last month
- Google Sheets Dashboard
 - Summary charts/aggregates by User
 - Breakdown by purpose or channel

Google Sheets Dashboard

Reporting



Getting started



Sign up for a Zapier account

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

Tip: Zapier begins with a 14-day free trial of the Professional tier functionality. 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

Integration Bundle

Pricing

Details

\$2,200

- End-to-end configuration for 1-2 flows
- Supports dynamic coding of User
- End-user summary/documentation
- 1-week integration monitoring and support

Reach out to support@sidekicksolutionsllc.com to execute a service agreement

Zapier subscription is separate from pricing above

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

info@sidekicksolutionsllc.com



Thank you