

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.

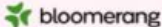
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


Welcome to Bloomerang Academy

Thank you for joining us!

Ask questions

Audio Settings 

Chat  Raise Hand  Q&A 

Leave Meeting

Diana Otero

Manager, Product Marketing

Diana Otero is the Product Marketing Manager at Bloomerang. She served on the board of the Nantahala Hiking Club, one of the 31 trail maintaining clubs of the Appalachian Trail Conservancy, an organization driven and powered by volunteers.



Bloomerang Automations: Zapier 201



 zapier

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Zapier webinar series

Join us to learn more!

Exploring Bloomerang Automations

Available in Bloomerang Academy!

Learn about common automation opportunities for nonprofits.

Zapier 101

Available in Bloomerang Academy!

Learn how to use Bloomerang triggers, actions, and search in Zapier.

Zapier Ask Me Anything Upcoming - 8/24

Have a question about Zapier integrations? Submit your question and get a response from a Zapier and Bloomerang integrations expert.

Agenda

1. Zapier intro
2. When to pursue Zapier integrations
3. Integration challenges and solutions
4. Getting started with Zapier



Have you heard of Zapier?

What is Zapier?

Automation software



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

How can I make sure the donation, interaction, or task in Bloomerang is created on the correct Constituent's timeline?

Dynamic Mapping



Dynamic mapping

Zapier Key Concept

- Hardcoded (static)

Primary Email Type

 Home 

- Custom (dynamic)

Primary Email

* 1. Supporter Email Address:

Dynamic mapping

Zapier Key Concept

- Used frequently for:
 - Creating records tied to a specific constituent
 - Updating an existing record
 - Mapping one or more values from the source app to the target app
 - Following formatting, conversions, or lookups

Dynamic mapping in practice

Bloomerang + Zapier

- Map the Constituent ID from the Find/Create Constituent search to the Bloomerang actions below:
 - Create Donation
 - Create Interaction
 - Create Task
 - Update Constituent
- Map values from source app to system or custom fields in Bloomerang
- Support mapping of multiple values to multi-select custom fields in Bloomerang

Dynamic mapping in practice

Bloomerang + Zapier

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I am syncing donations from a fundraising app into Bloomerang. How do I change the Fund, Campaign, or Appeal coded on the donation to align with the fundraising effort/campaign?

Lookup Tables


Lookup tables

Zapier Key Concept

- Convert data from your source app to the corresponding value in your target app

Values

Lookup Key

 1. Item Number: Where it's needed most

Value you would like to lookup.

Lookup Table

Where it's needed most	Unrestricted	×
Capital Campaign	Building Fund	×
Student Sponsorships	Temporarily Restricted	×

SOURCE **TARGET**

Lookup tables

Zapier Key Concept

- **Formatter by Zapier**
 - Lookup returns single value
 - Provides line-item support
 - Can assign a fallback value
- **Google Sheets**
 - Lookup can return multiple values
 - Allows for easy edits/updating outside of the live Zap
 - Supports lookup based on two values

Lookup tables in practice

Bloomerang + Zapier

- Lookup the Bloomerang Fund, Campaign, and/or Appeal based on the...
 - Fundraising campaign (Classy, GiveWP, etc.)
 - Eventbrite event ID
 - Item purchased in an eCommerce store (Shopify or WooCommerce)
- Convert source app field values to values in a Bloomerang custom field
- Convert a Bloomerang custom field value to the corresponding value in a target app

The record that triggers my Zap has elements that need to be processed differently. Can I use conditional logic in Zapier?

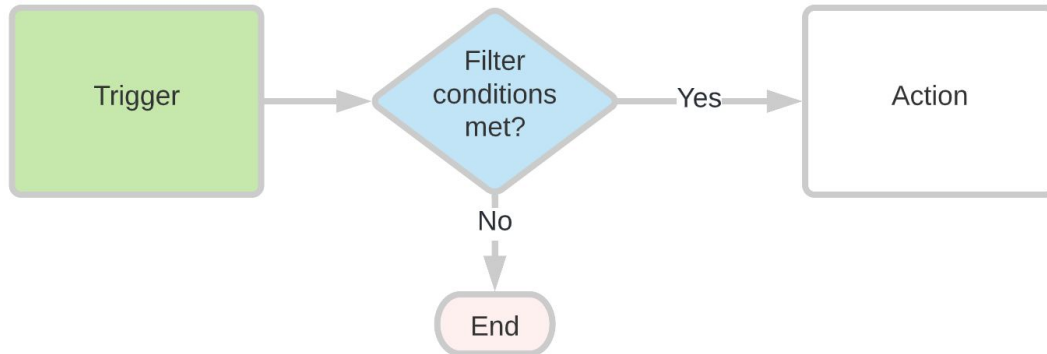
Filters and Paths



Filters

Zapier Key Concept

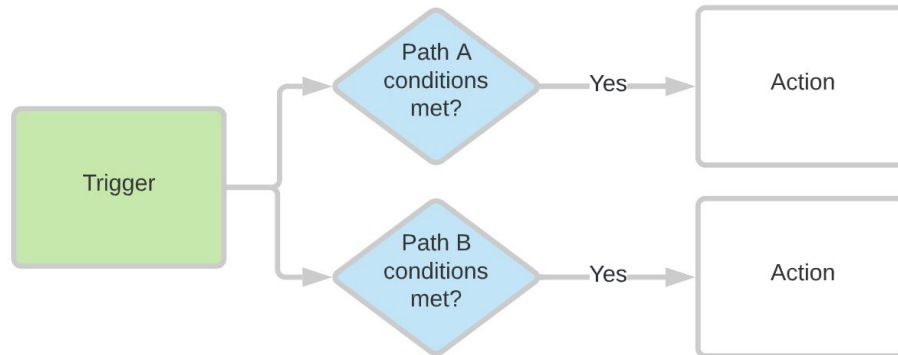
- Set one or many conditions using AND or OR logic
- Zap will only continue if conditions are met



Paths

Zapier Key Concepts

- Branch your Zap down up to three paths
- Zap will only proceed down the path if conditions are met (like filters)



Tip: Only available in Professional plan subscriptions (or higher)

Filters and paths

Zapier Key Concepts

- Manage Zapier task usage
- Control when certain actions are performed
- Can use combination of filters and paths in a Zap
- Can nest paths within a path

Filters and paths in practice

Bloomerang + Zapier

- Filters
 - Only continue if the Bloomerang constituent has a certain custom field value
 - Only update the constituent if the Find Constituent action matched an existing account
- Paths
 - Split Zap to Find/Create Constituent in Bloomerang for:
 - Path A: Individuals
 - Path B: Organizations

Questions?

I think my source app is giving me a date in a different time zone. How do I make sure I'm assigning the date in Bloomerang related to my time zone?

Date Formatting

Date formatting

Zapier Key Concepts

- Using the Formatter by Zapier app
- Add/subtract or compare dates
- Format dates
 - Change date format (ex: MM/DD/YYYY to YYYY-MM-DD)
 - Convert time zones (ex: Eastern to Pacific)

Date formatting in practice

Bloomerang + Zapier

- Format date/time field to YYYY-MM-DD
 - Preferred date format for mapping into Bloomerang
- Convert date/time from source app time zone (UTC) to your time zone (Eastern)
- Add 365 days to today's date to generate expiration date for membership

Customers often purchase more than one item from our eCommerce store and we need to code the Fund, Campaign, and/or Appeal differently per item. How can we do this?

Line Item Support

Line item support

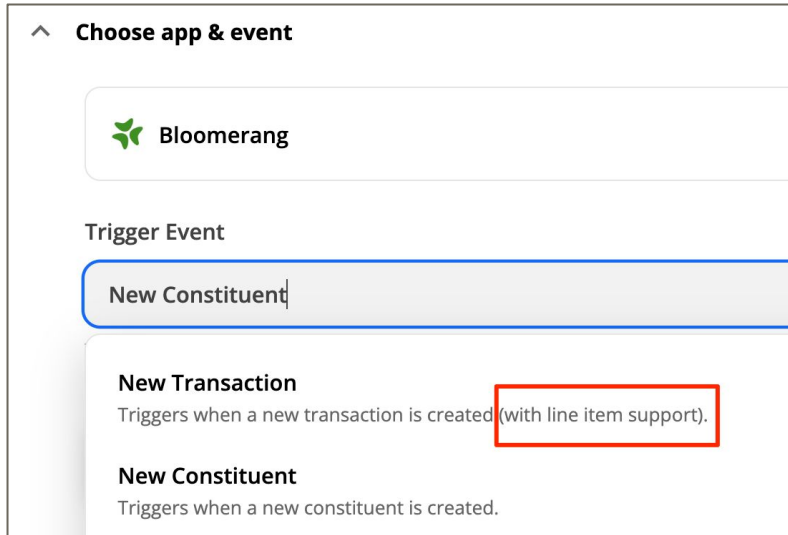
Zapier Key Concepts

- Subsets of individual items
- Data is presented in a collection (“array”)
- Works best when line items are supported in the trigger and action


Line item support

Zapier Key Concepts

- Zapier triggers and actions will note if line items are supported



Choose app & event

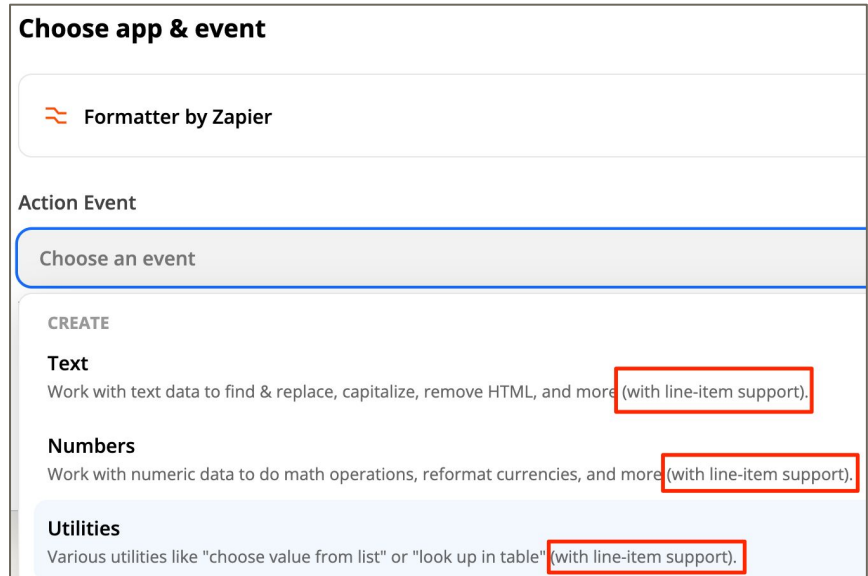
 Bloomerang

Trigger Event


New Constituent

New Transaction
Triggers when a new transaction is created (with line item support).

New Constituent
Triggers when a new constituent is created.



Choose app & event

 Formatter by Zapier

Action Event

Choose an event

CREATE

Text
Work with text data to find & replace, capitalize, remove HTML, and more (with line-item support).

Numbers
Work with numeric data to do math operations, reformat currencies, and more (with line-item support).

Utilities
Various utilities like "choose value from list" or "look up in table" (with line-item support).

Line item support in practice

Bloomerang + Zapier

- Split donations in Bloomerang to accounting software on single sales receipt/invoice
- Items purchased in eCommerce order to create split transaction in Bloomerang

Questions?

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

Resources

<https://www.zapier.com/help>

- [Lookup Tables](#)
- [Filters](#)
- [Paths](#)
- [Modify date and time formats](#)
- [Use line items in Zaps](#)

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



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Thank you