

Bloomerang Automations: Zapier Ask Me Anything




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 201

[Available in Bloomerang Academy](#)

Learn how to make more of your Zapier automations using lookup tables, conditional paths, filters, date/time conversions, and more!

Agenda

1. Zapier intro
2. When to pursue Zapier integrations
3. FAQs
4. Q&A



**Did you attend (or watch) the prior
webinars in this series?**

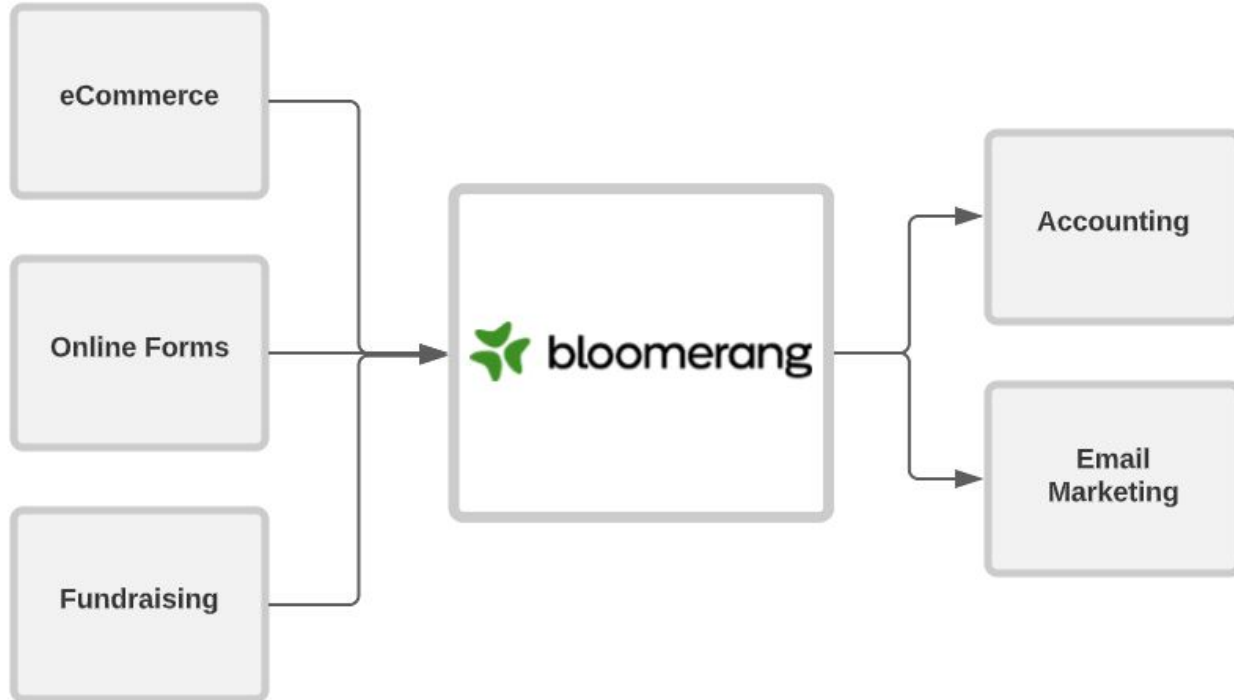
What is Zapier?

Automation software



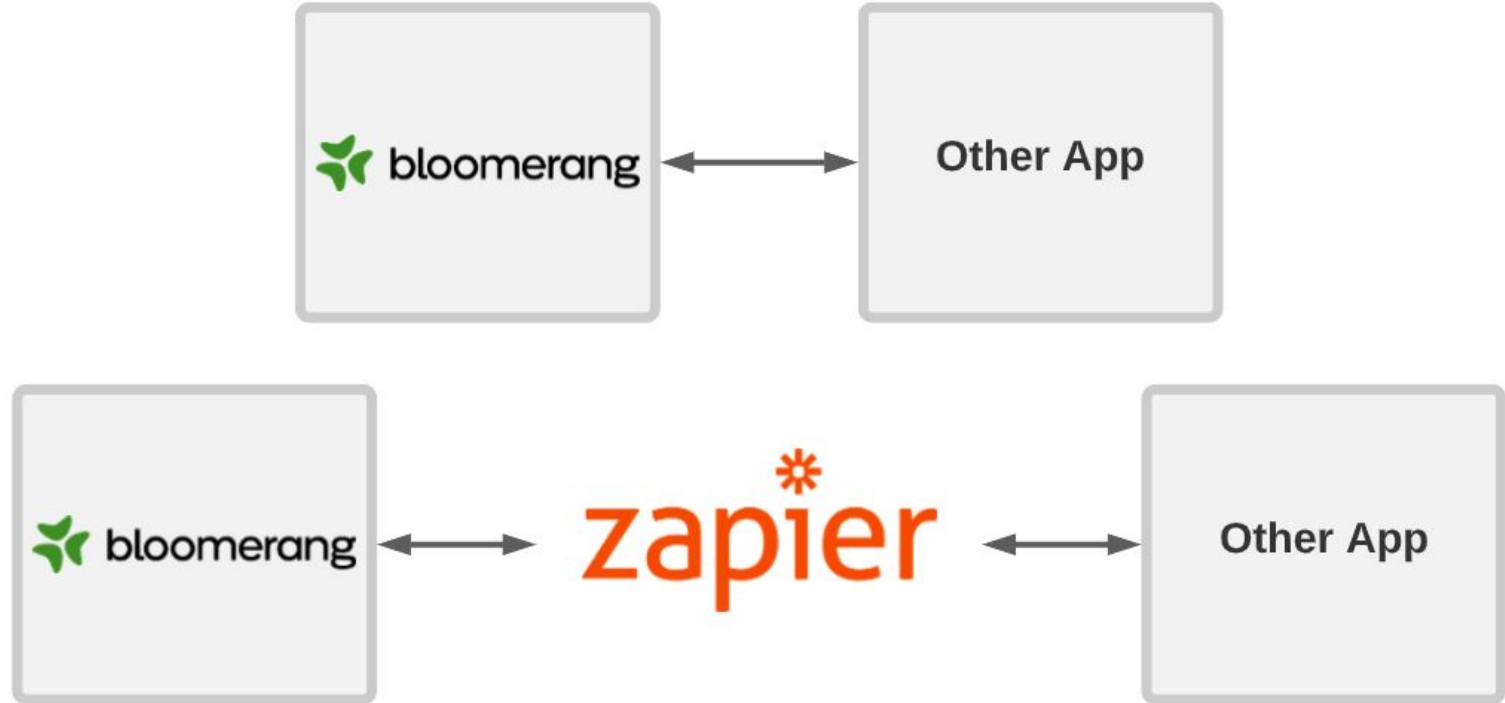
Why pursue integrations?

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

FAQs



How does the Find Constituent search work?

Answer

Find Constituent

- First and Last Name are required
- At least one of address, phone or email are required
- Search is looking for an exact match

**Will Update Constituent overwrite
data?**

Answer

Update Constituent

- Will overwrite all standard and custom fields, except address, phone, and email
- For address, phone, and email...
 - The new (or matched) data will be promoted as primary
 - The previous data will be demoted to secondary (not deleted)

How quickly does my Zap trigger?

Answer

Zap Triggering

- Dependent on the plan purchased in Zapier
 - Free Plan: 5 minutes
 - Starter Plan: 1 minutes
 - Professional Plan: 1 minutes

Can Zapier connect multiple apps in a single Zap?

Answer

Multiple Apps

- Zaps can be configured to connect one or many apps

New Successful
Transactions in
CLASSY

Find/Create
Constituent in
BLOOMERANG

Create Donation
in
BLOOMERANG

Add/Update
Subscriber in
MAILCHIMP

Add Subscriber
to Tag in
MAILCHIMP



What are the most common automations for Bloomerang?

Answer

Common Automations

- Fundraising apps
- Email marketing
- Accounting
- eCommerce
- Event registration
- Reporting dashboards
- Notifications
- Online data collection forms

**What are some of your favorite
Bloomerang automations?**

Answer

Favorite Automations

- Bloomerang to Bloomerang
- Dashboards
- Notifications
- Drip email campaigns

How much does Zapier cost?

Answer

Zapier Cost

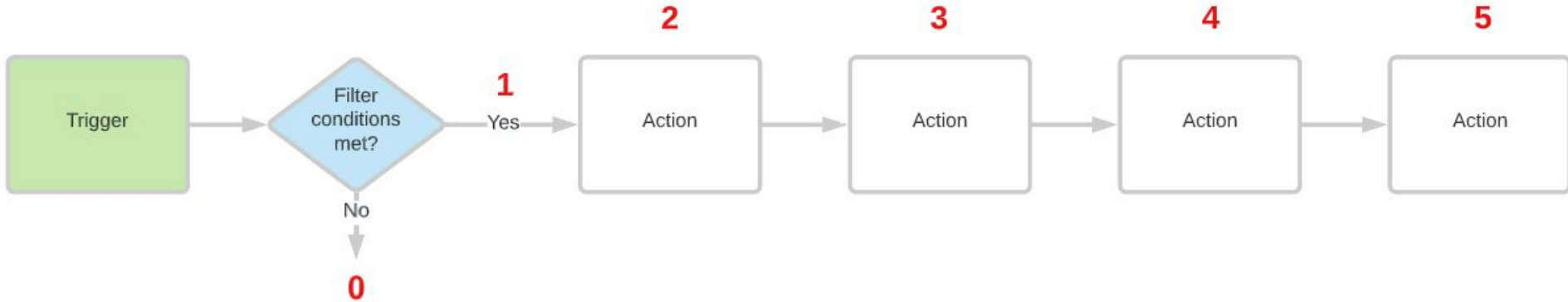
- Tiers based on different task allotments per month
- Average cost is \$20-\$75/month
- 15% discount available for non-profits
- Upgrade / downgrade as needs change
- Bloomerang Zapier app is free to use!

What is a task in Zapier?

Answer

Tasks

- An action your Zap successfully completes
- What counts as a task?
- What doesn't count as a task?



**What happens if we hit our task
limit in Zapier?**

Answer

Task Limit

- Each pricing plan has a different task limit per month
- Zapier will providing notification when you hit 80% of allotment
- Tasks get placed in a “held” status for 30 days
- Can replay tasks when usage resets or subscription is upgraded

Q&A



How do we connect Constant Contact and Bloomerang?

Answer

Bloomerang > Constant Contact

- Triggering events
 - New Constituent
 - Updated Constituent
 - New Transaction
- Actions
 - Find or Create Contact
 - Update Contact
- Cannot map to custom fields

Answer

Constant Contact > Bloomerang

- New Contact
 - Find or Create Constituent in Bloomerang
 - Recommend only syncing when there is a First/Last Name
- New Email Open
 - Create an Interaction or Note

**Does Zapier integrate with Gmail and
place emails as interactions into
Bloomerang?**

Answer

Gmail and Bloomerang

- Yes, Gmail is has an app in Zapier
- Triggering events
 - New email (in specified mailbox)
 - New starred email
 - New labeled email
 - New email matching search
- Recommend using [Bloomerang's BCC feature](#)

Do you know of any platform that works well with Zapier where we can send letters via a mail house?

Answer

Mailhouse

- Handwrytten
- Others likely available in Zapier's marketplace
 - www.zapier.com/apps

How can we have donors make pledges online with a payment schedule and have it sync to Bloomerang?

Answer

Pledges

- Bloomerang API can support creation of a pledge in Bloomerang, but...
 - Cannot set it up to be auto-processed by Bloomerang
 - Can only be created with standard frequencies (i.e., annual, monthly, etc.) not custom
- Alternative is to a pledge/fundraising app and syncing the payments only

After integrating PayPal with Bloomerang, can the PayPal option appear on my Bloomerang website giving form?

Answer

PayPal and Online Forms

- PayPal is not a payment gateway option for Bloomerang online forms
- Place PayPal button at the top of webpage where the form is embedded

When using a PayPal button with two options, how do we enter the correct Fund in Bloomerang?

Answer

PayPal Designation Options

- Use a lookup table to convert the selection to the corresponding Bloomerang Fund
- Resources
 - [\[WEBINAR\] Automating Donations from PayPal to Bloomerang](#)
 - [\[WEBINAR\] Zapier 201](#)

Q&A



Future Zapier webinars

Join us to learn more!

Classy + Bloomerang

October

Learn how to set up an integration between Classy, a fundraising app, and Bloomerang.

Bloom-to-Bloom Memberships

December

Learn how to set up a Bloomerang to Bloomerang automation to manage membership fields on the constituent's profile.

**What Bloomerang and Zapier content
do you want to see in the future?**



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

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Thank you