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Welcome to Bloomerang Academy

Thank you for joining us!

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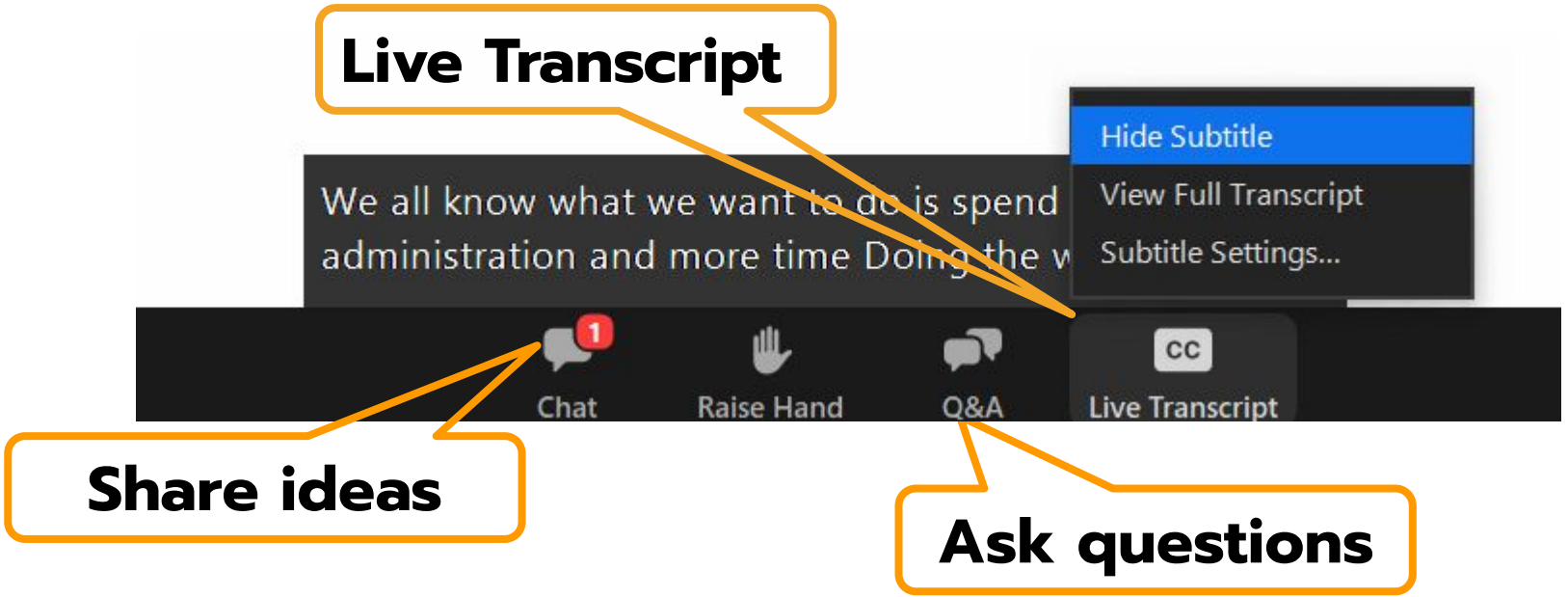
Join the Online Audio or Dial in!

Housekeeping



Housekeeping

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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!

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Bloomerang + Zapier

Frequently Asked Questions

zapier

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Agenda

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

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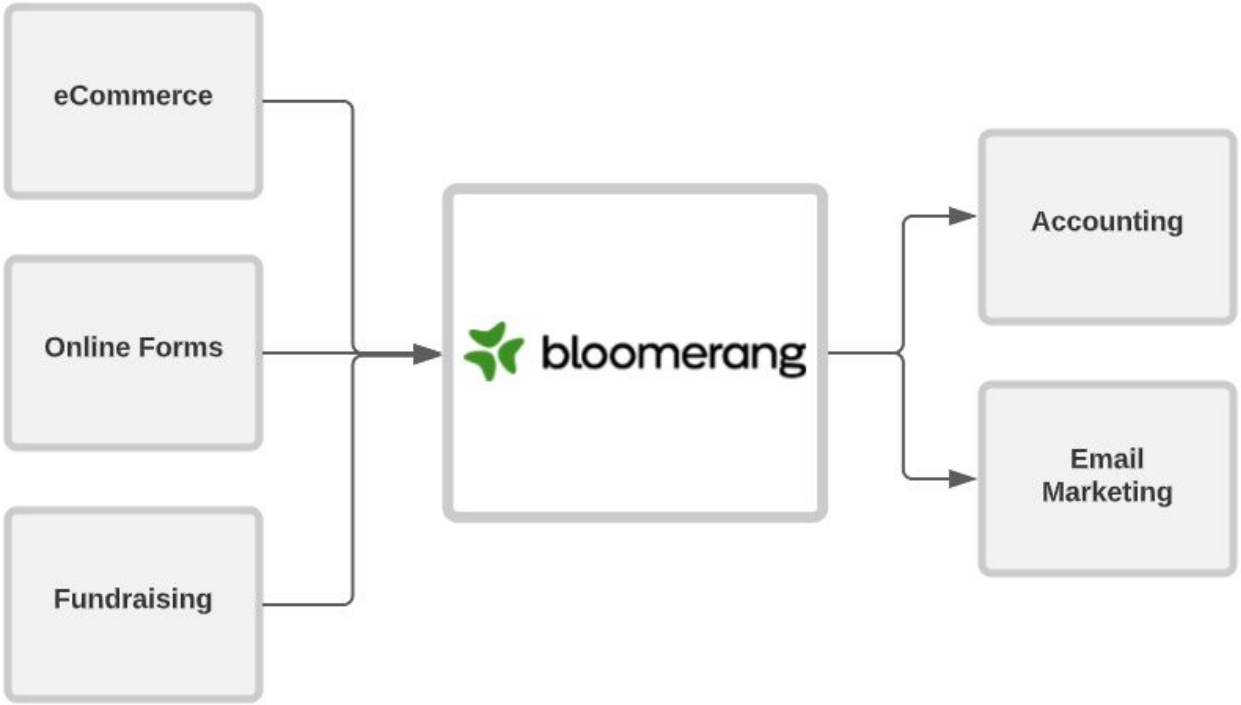
Have you attended (or watched) previous Bloomerang + Zapier webinars?

What is Zapier?

Automation software

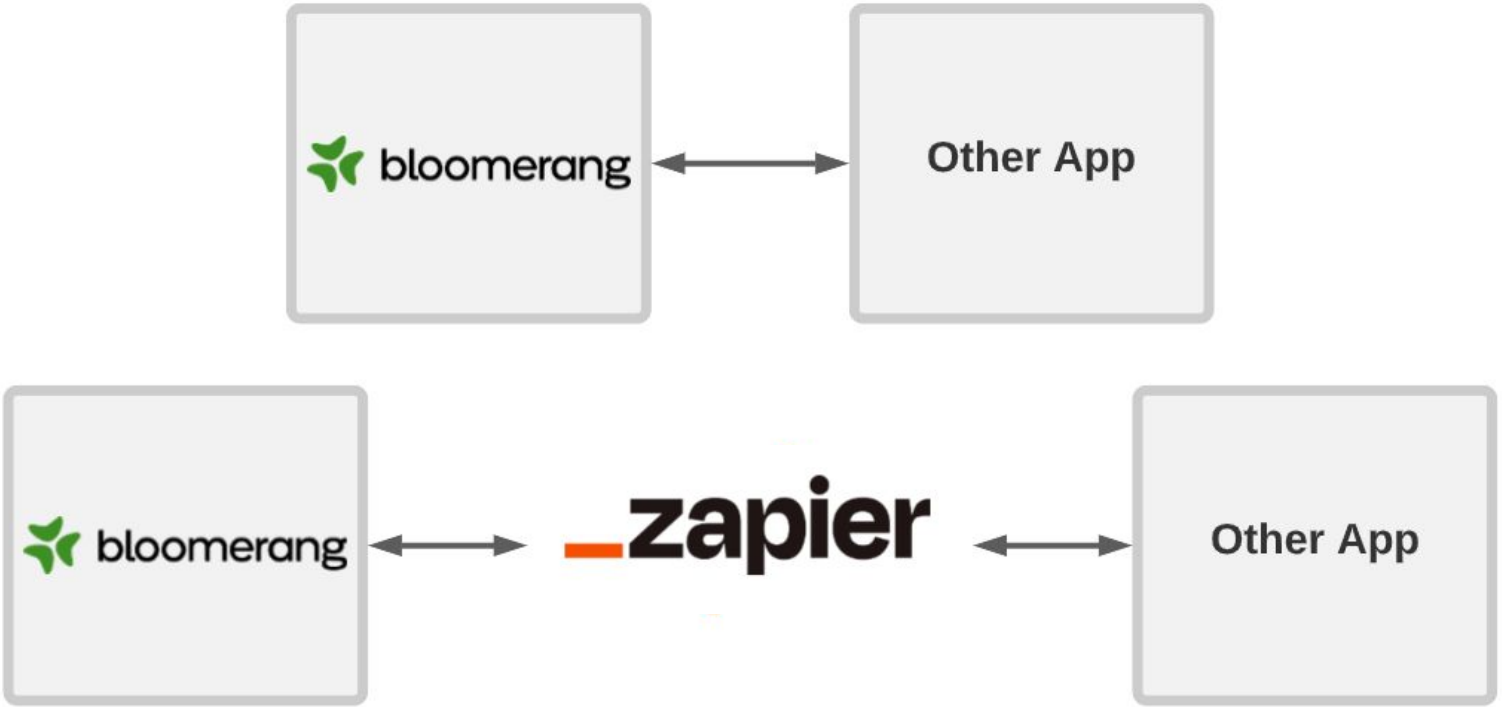
Why pursue integrations?

Key feature in Bloomerang system and fundraising strategy



Types of integrations

Zapier vs. native



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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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FAQs

How does the Find Constituent search work?

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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?

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Answer

Zap Triggering

- Dependent on the plan purchased in Zapier
  - Free Plan: 15 minutes
  - Starter Plan: 15 minutes
  - Professional Plan: 2 minutes

Can Zapier connect multiple apps in a single Zap?

Answer

Multiple Apps

- Zaps can be configured to connect one or many apps

What are the most common automations for Bloomerang?

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Answer

Common Automations

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

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What are some of your favorite Bloomerang automations?

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Answer

Favorite Automations

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

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What are your best tips/tricks for pursuing automations?

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Answer

Tips and tricks

- If possible, do not use team-member specific credentials to connect
- Draft/write out what the flow needs to do first
- Plan out any known conversions/transformations
- When in doubt, start simple and enhance over time

How much does Zapier cost?

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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!

Do we need a paid plan in Zapier to deploy Bloomerang automations?

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Answer

Zapier plans

- Depends on the use case
- Required for:
  - Multi-step Zaps
  - Premium apps
- Average Bloomerang client is on Starter or Professional plan (under 10,000 tasks/month)

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What is a task in Zapier?

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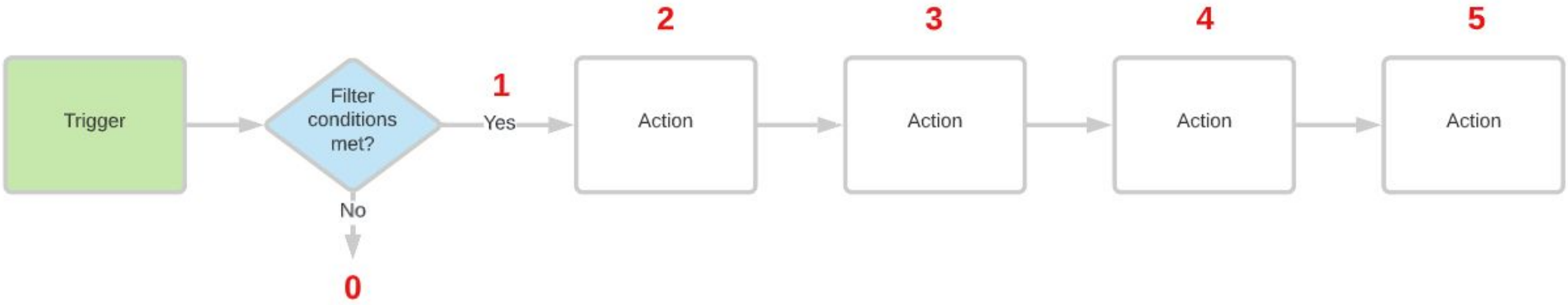
Answer

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?

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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

Can I easily change my Zapier subscription?

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Answer

Changing Zapier plan

- Yes, Zapier allows you to upgrade or downgrade
- Annual vs. monthly billing options
- If data volume is cyclical, may be able to downgrade in slow months and upgrade in higher months

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?

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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

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

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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?

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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

How do I get started with Bloomerang automations in Zapier?

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Answer

Getting started

- Sign up for Zapier
- Apply for non-profit discount
- Connect Bloomerang
- Connect other apps, as desired

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Live Q&A

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Would you like a follow-up about consulting services?

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SIDEKICK SOLUTIONS

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

www.SidekickSolutionsLLC.com

info@sidekicksolutionsllc.com

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Thank you