

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

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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!

Bloomerang + Zapier

Automating an eCommerce store
with Bloomerang



 zapier

Jessie Gilchrist

Zapier Product Manager, Senior Consultant



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info@sidekicksolutionsllc.com



Agenda

1. Intro to Zapier
2. Basic order sync
3. Dynamic coding in Bloomerang
4. Getting started



Zapier

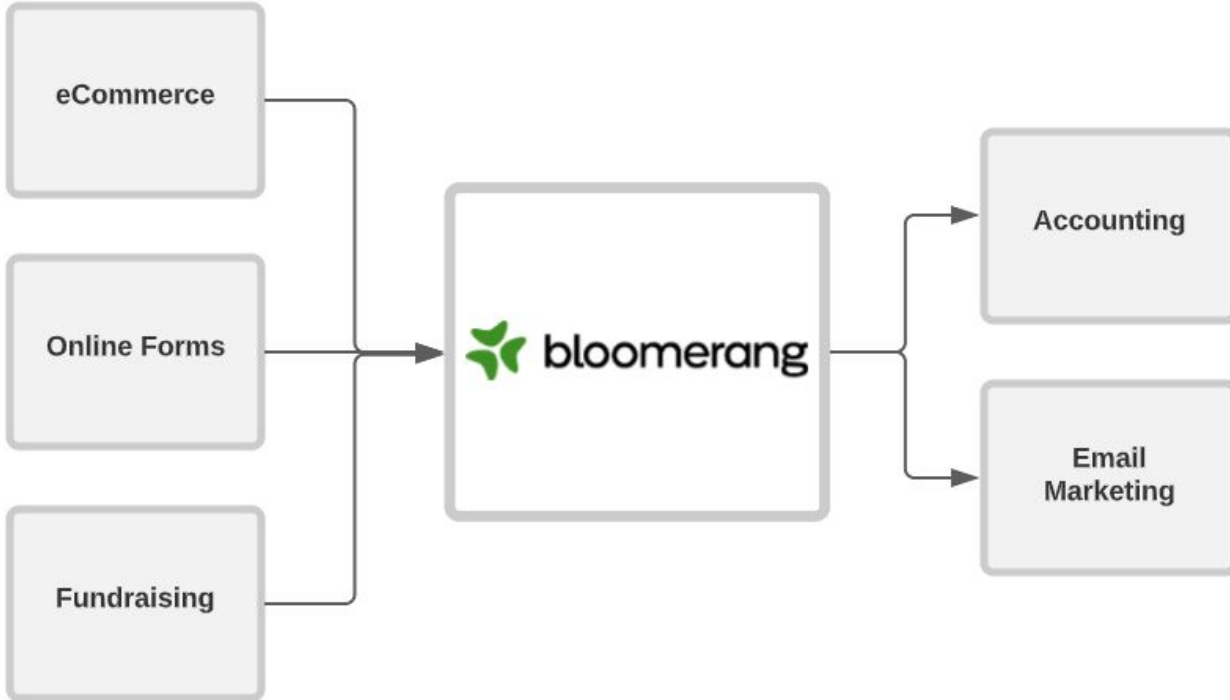


What is Zapier?

Automation software



Bloomerang is central hub



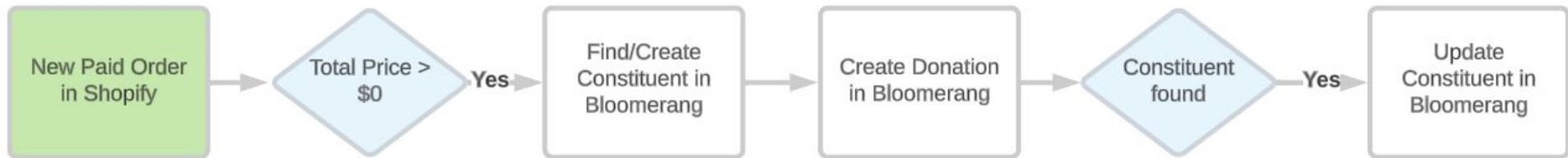
**Do you currently have any
Zapier integrations?**

Basic sync




Basic sync

For new paid orders in Shopify, find or create the constituent in Bloomerang and create a donation in the constituent's timeline. Optionally, update existing constituents.



Filter

Basic sync

 **Action**
2. Only continue if... Total Price > \$0 ⋮

App ✓

Filter setup & testing ✓

✓ Your Zap **would** have continued
If this was unexpected, edit your filter below & retest. [Learn more.](#)

SAMPLE DATA ⌵
Created: 2023-06-06 21:26:48

Only continue if...


🇺🇸 1. Total Price ⌵ (Number) Greater than ⌵ 0 ×

+ And + Or

Find (or Create) Constituent

Basic sync

- Two field check
 - Name
 - Address
 - Phone
 - Email
- Create if none found

 **Action** 3. Find Constituent in Bloomerang ...

App & event ✓

Account ✓

Action ✓

* Type (required)

Individual

* First Name (required)

1. Customer First Name: Stormie

* Last Name (required)

1. Customer Last Name: Gilchrist

Street Address

1. Billing Address Address 1: 123 Main St.

Phone

1. Customer Phone: +15039084929

Email

1. Customer Email: jessie@sidekick...olutionsllc.com

Create Donation

Basic sync

- Standard fields
 - Date
 - Amount
 - Fund, Campaign, Appeal
- Custom fields

* Constituent 1 2 3 (required)

3. ID: 3172353 Or add search step

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

* Date 📅 (required)

1. Processed At: 2023-06-06T21:16:59-07:00

Date will default to today's date if input is not in date/time format.

* Method (required)

Credit Card

i The Designation section will create split payments if you have line items from a previous step. [Learn more about split payments.](#)

Designations

* Amount 1.0 (required)

1. Total Price: 2.00

Non-deductible Amount 1.0

Enter text or insert data...

* Fund (required)

Unrestricted

Campaign


Store

Appeal

Shopify

Filter

Basic sync

 **Action**
5. Only continue if... ⋮


✓ App ✓

^ Filter setup & testing ✓

✓ Your Zap **would** have continued
If this was unexpected, edit your filter below & retest. [Learn more.](#)

⚡ **SAMPLE DATA**
Created: 2023-06-06 21:26:48 ∨


Only continue if...

 3. Zap Data Was Fou... ∨ (Boolean) Is true ∨ ×

+ And + Or


Update Constituent

Basic sync

 **Action**
6. Update Constituent in Bloomerang

- App & event ✓
- Account ✓
- Action ✓

* Constituent 1 2 3 (required)

 3. ID: 3172353 ⌵

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

Status


Choose value... ⌵


Primary Address Type

Home ⌵


Type is required when adding an address.

Primary Address Street


 1. Billing Address Address 1: 123 Main St.

 1. Billing Address Address 2: No data

Primary Address City


 1. Billing Address City: Port Angeles

Primary Address State


 1. Billing Address Province Code: WA

Accepts either full State (e.g. Indiana) or State abbreviation (e.g. IN)

Primary Address Postal Code

 1. Billing Address Zip: 98362

Primary Address Country

 1. Billing Address Country Code: US


Accepts either full Country (e.g. United States) or Country Code (e.g. US)

Primary Email Type

Home ⌵

Type is required when adding an email.

Primary Email

 1. Customer Email: jessie@sidekick...olutionsllc.com

Dynamic coding



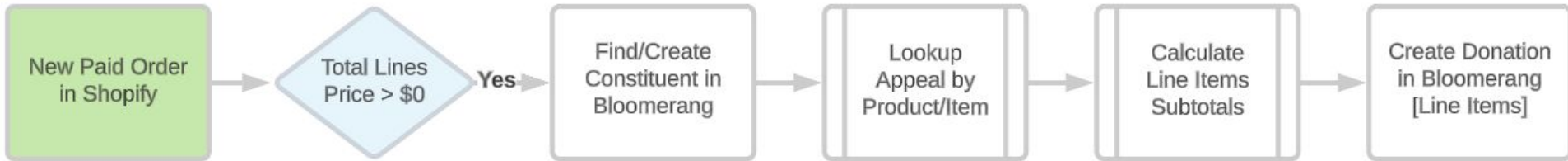
Lookup tables

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 Fund, Campaign, and/or Appeal on a donation based on the product.



Filter


Dynamic Coding

⋮ Action2. Only continue if... Total Lines Price > \$0⋮

∨ App✓

∧ Filter setup & testing✓

Only continue if...

 1. Total Line Items Pr... ◇	(Number) Greater than ◇	0	×
--	--------------------------------------	---	---

+ And + Or

Lookup

Dynamic coding

* Transform (required)

Lookup Table ⌵

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

Values

Lookup Key

📄 1. Line Items Sku: 4567,1237

Value you would like to lookup.

Lookup Table

1234	Apparel	×
1235	Apparel	×
1236	Apparel	×
1237	Apparel	×
4567	eBooks	×

+

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


Fallback Value

Shopify

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

Calculate Line Items Subtotals

Dynamic coding

 **Action** ...
5. Calculate Line Items Subtotals

App & event ✓

Action ✓

* Transform (required)

Spreadsheet-Style Formula ⌵

i Transform a number with a spreadsheet-style formula.

Values

* Formula (required)

🔒 1. Line Items Price: 1.00,1.00 * 🔒 1. Line Items Quantity: 1,2

Spreadsheet-style formula to evaluate. Example: `ROUNDUP(100.1231, 2) * 100`. For more help and examples... [more](#)

Create Donation

Dynamic coding

* Constituent 1 2 3 (required)

3. ID: 3172353 Or add search step

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

* Date (required)

1. Processed At: 2023-06-06T21:33:36-07:00

Date will default to today's date if input is not in date/time format.

* Method (required)

Credit Card

i The Designation section will create split payments if you have line items from a previous step. [Learn more about split payments.](#)

Designations

* Amount 1.0 (required)

5. Output: 1,2

Non-deductible Amount 1.0

Enter text or insert data...

* Fund (required)

Unrestricted

Campaign

Store

Appeal

4. Output: eBooks,Apparel

Transaction Details >> Transaction Source

Shopify

Transaction Details >> Transaction/Order ID

1. Order Number: 1003

Transaction Details >> Description

1. Line Items Name: e-Book,Short sl...shirt - X-Large

Transaction Details >> Quantity

1. Line Items Quantity: 1,2

Shipping




Shipping

For new paid orders in Shopify with shipping greater than \$0, find or create the constituent in Bloomerang and create a donation in the constituent's timeline.



Filter

Shipping

Action
2. Only continue if... Shipping > \$0 ⋮


✓ App ✓

^ Filter setup & testing ✓

✓ Your Zap **would** have continued
If this was unexpected, edit your filter below & retest. [Learn more.](#)

⚡ **SAMPLE DATA**
Created: 2023-06-06 21:39:41 ∨


Only continue if...

 1. Shipping Lines Pri... ∨ (Number) Greater than ∨ 0 ×

+ And + Or

Delay

Shipping




... | Action


3. Delay For in Delay by Zapier

...

∨ App & event



∧ Action



* Time Delayed For (value) 1.0 (required)

Use a number (decimals are accepted). Note: minimum delay is one minute.


* Time Delayed For (unit) (required)

Choose the unit (minutes, hours, days, weeks).

Find (or Create) Constituent

Shipping

- Two field check
 - Name
 - Address
 - Phone
 - Email
- Create if none found

 **Action** ...
3. Find Constituent in Bloomerang

✓ **App & event**

✓ **Account**

^ **Action** ✓

* **Type** (required)

Individual

* **First Name** (required)

1. Customer First Name: Stormie

* **Last Name** (required)

1. Customer Last Name: Gilchrist

Street Address

1. Billing Address Address 1: 123 Main St.

Phone

1. Customer Phone: +15039084929

Email

1. Customer Email: jessie@sidekick...olutionsllc.com

Create Donation

Shipping

- Standard fields
 - Date
 - Amount
 - Fund, Campaign, Appeal
- Custom fields

* **Constituent** 1 2 3 (required)

Or add search step

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

* **Date** (required)

Date will default to today's date if input is not in date/time format.

* **Method** (required)

i The Designation section will create split payments if you have line items from a previous step. [Learn more about split payments.](#)

Designations

* **Amount** 1.0 (required)

Non-deductible Amount 1.0

* **Fund** (required)

Campaign

Appeal

Other enhancements

- Support for Individual and Company (Organization) customers
- Support for international customers (address formatting)
- Conversion of Shopify data to Bloomerang custom fields
- Account for discounts and tax

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

\$2,000

- End-to-end configuration for one (1) store
- Synd of paid orders to create donations in Bloomerang
- Supports dynamic coding of Fund, Campaign, and/or Appeal by product
- 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