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Welcome to Bloomerang Academy

Thank you for joining us!

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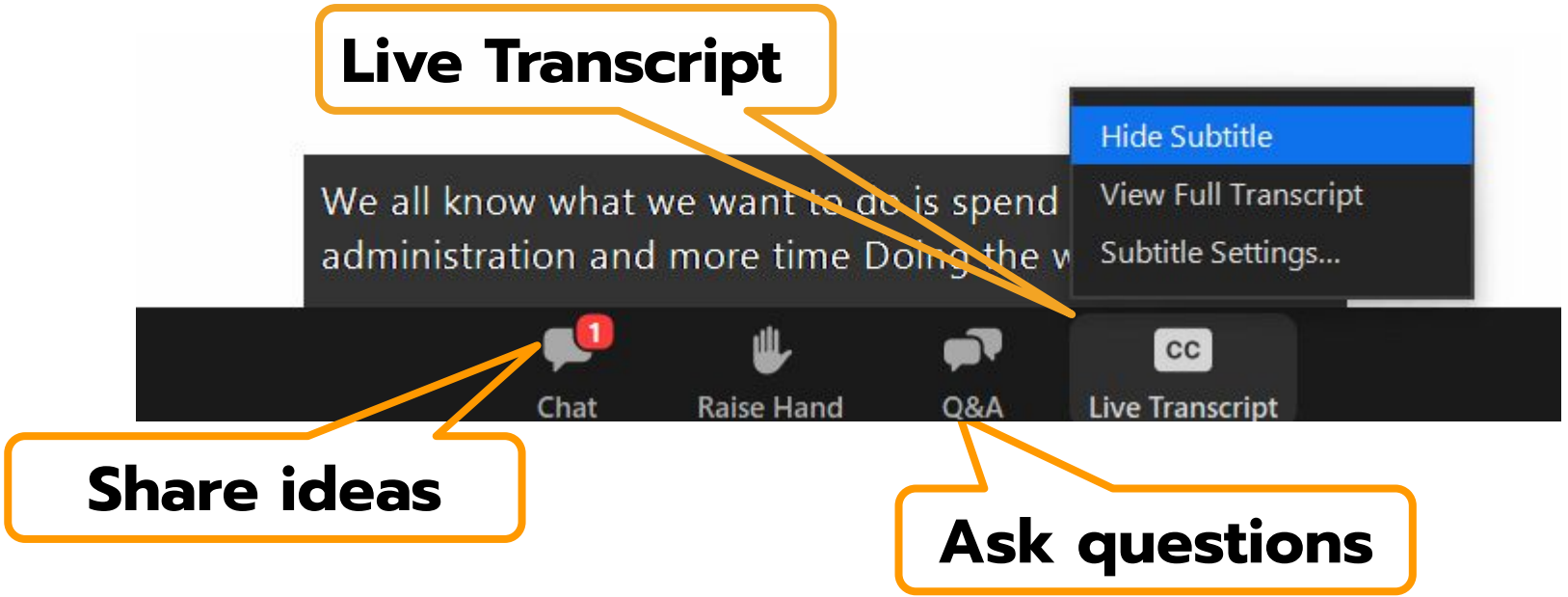
+1 669 900 6833

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

Automating an eCommerce store with Bloomerang

zapier

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Jessie Gilchrist

Zapier Product Manager, Senior Consultant

SIDEKICK SOLUTIONS

www.SidekickSolutionsLLC.com

info@sidekicksolutionsllc.com

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Agenda

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

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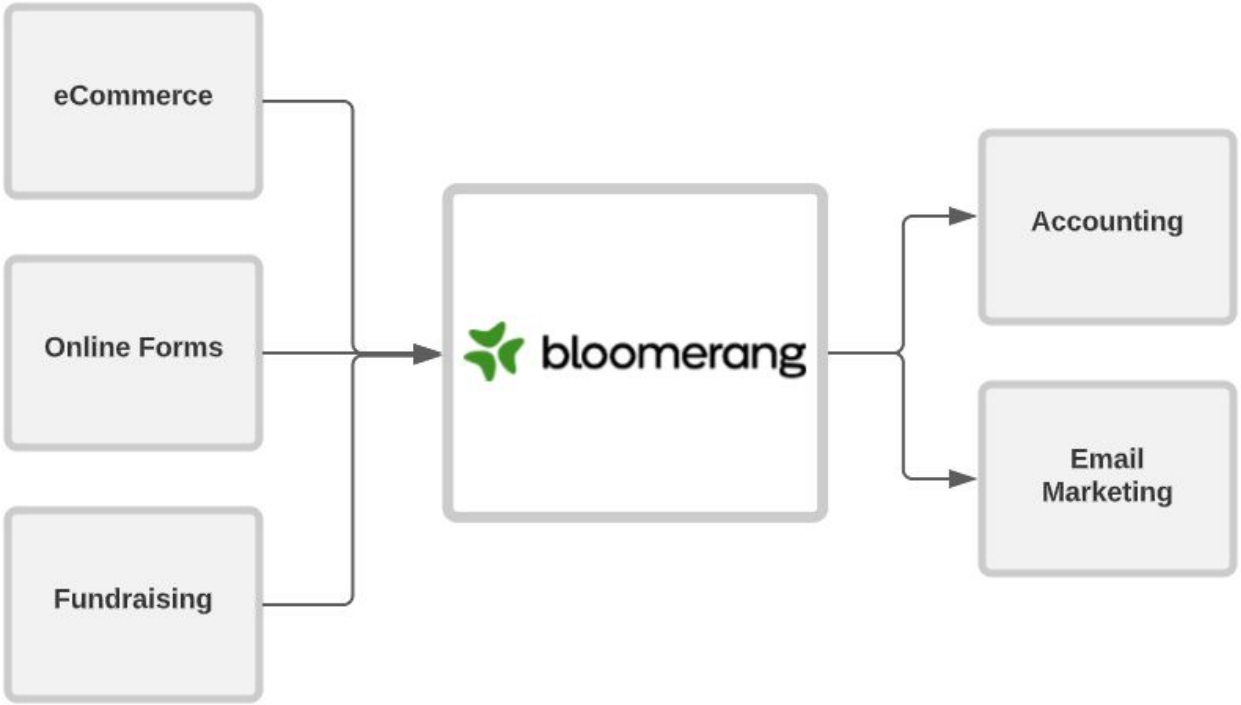
Zapier

What is Zapier?

Automation software

Bloomerang is central hub



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Do you currently have any Zapier integrations?

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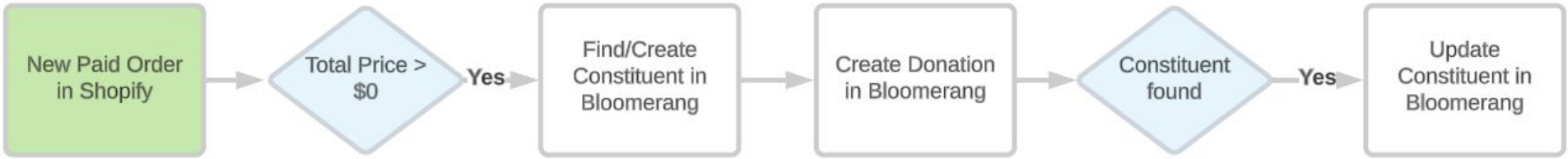
Basic sync

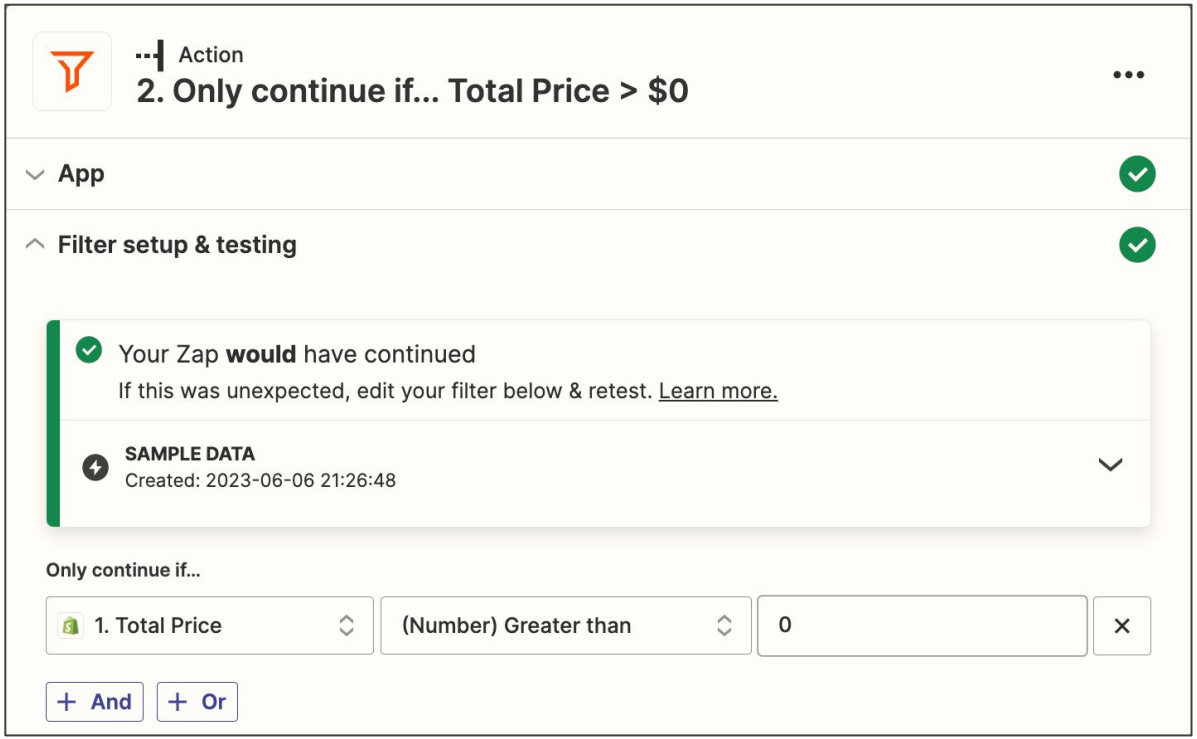
Basic sync

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

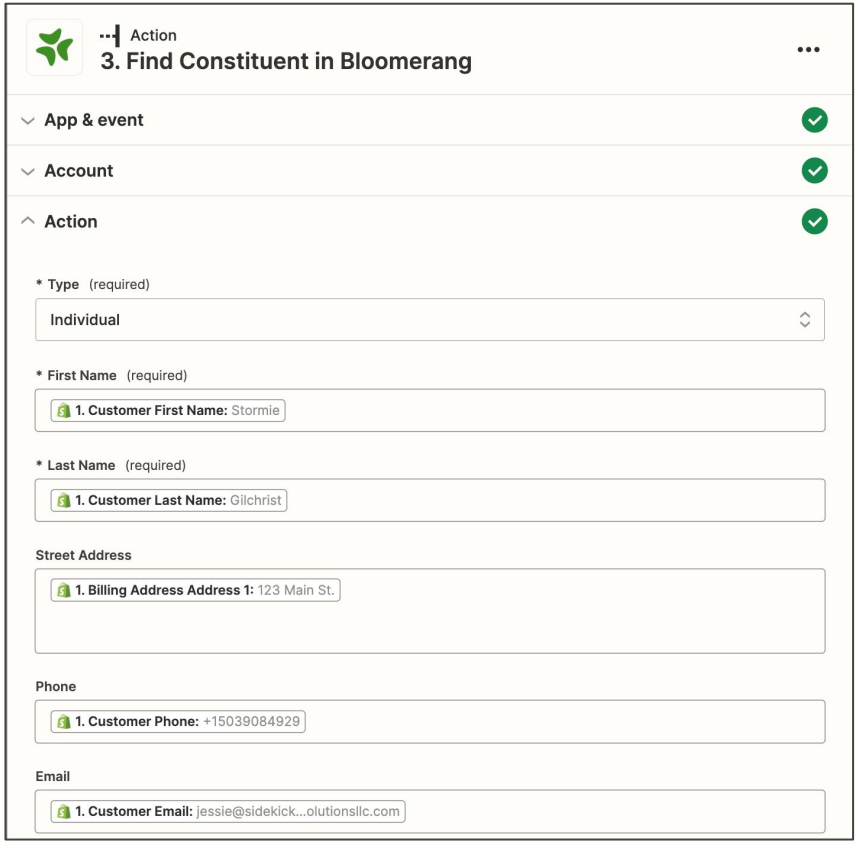
Basic sync



Find (or Create) Constituent

Basic sync

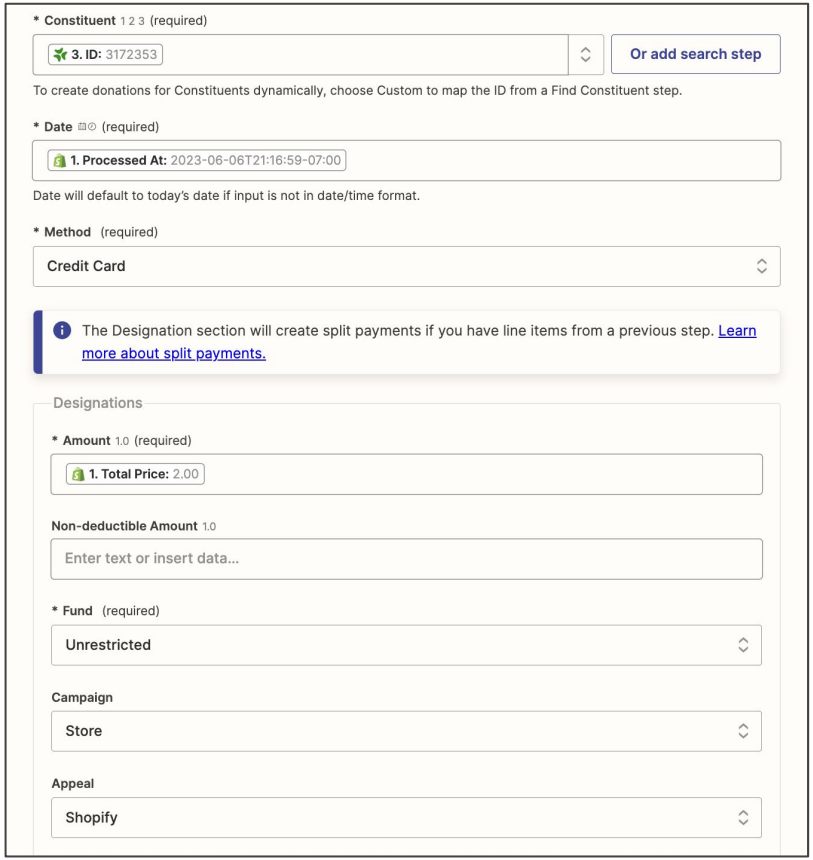
- Two field check
  - Name
  - Address
  - Phone
  - Email
- Create if none found



Create Donation

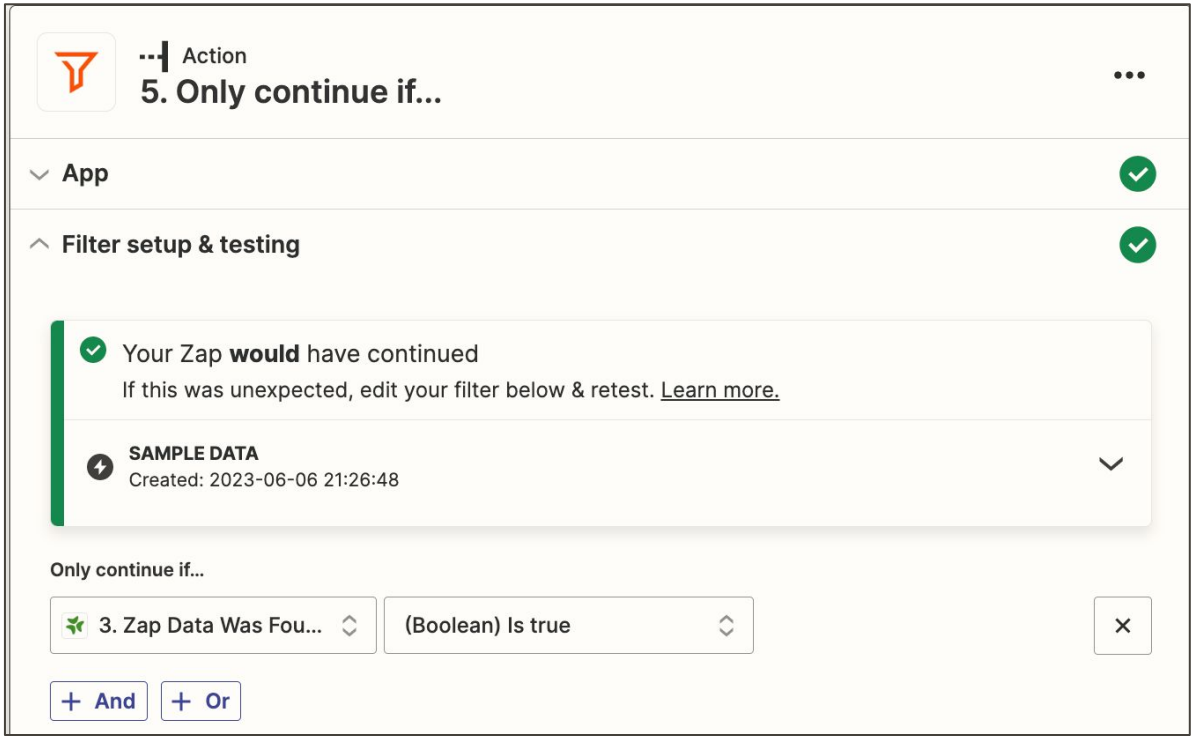
Basic sync

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



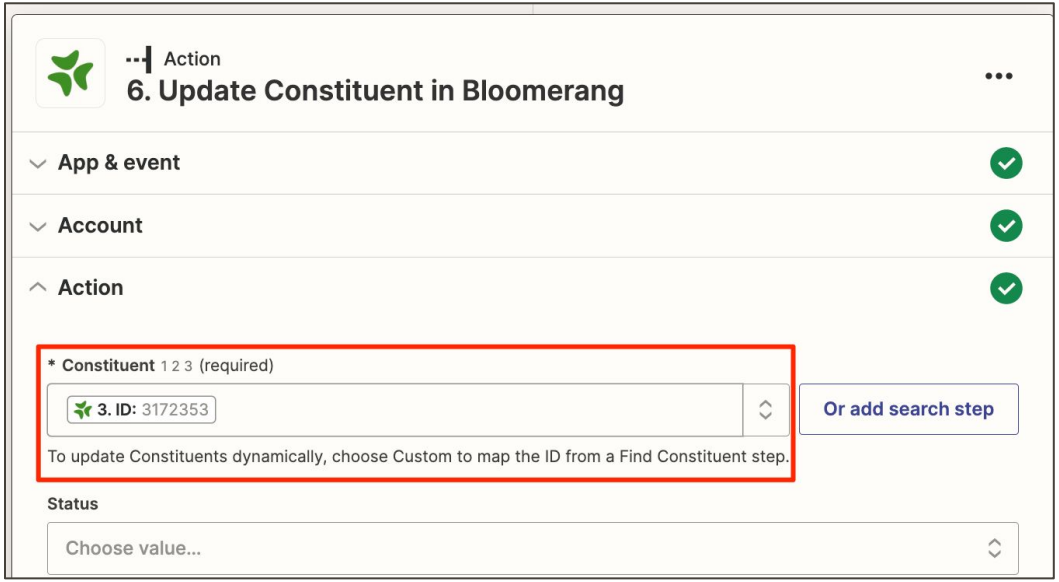
Filter

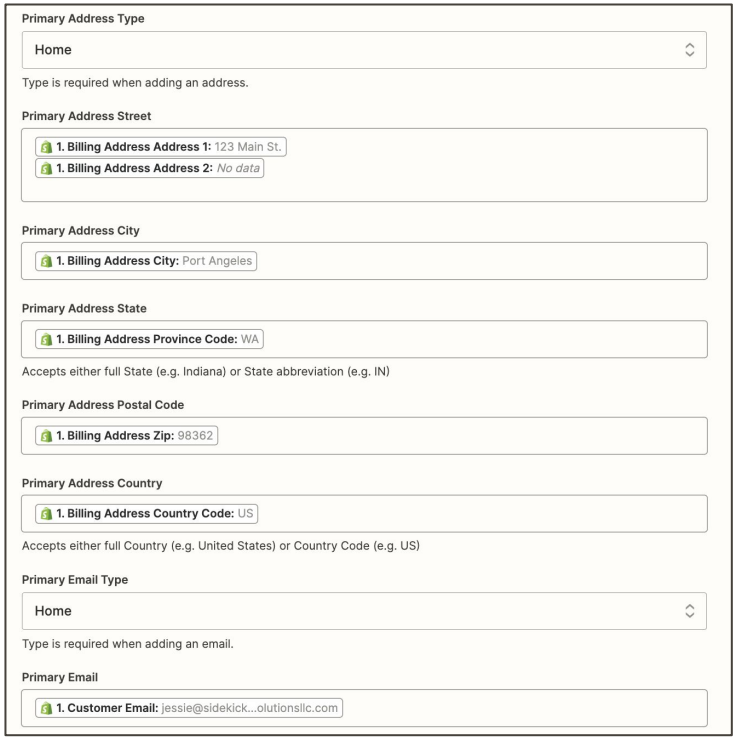
Basic sync



Update Constituent

Basic sync





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Dynamic coding

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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

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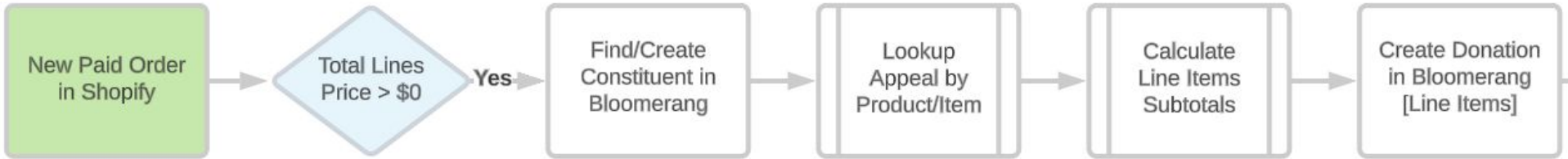
Dynamic coding

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.



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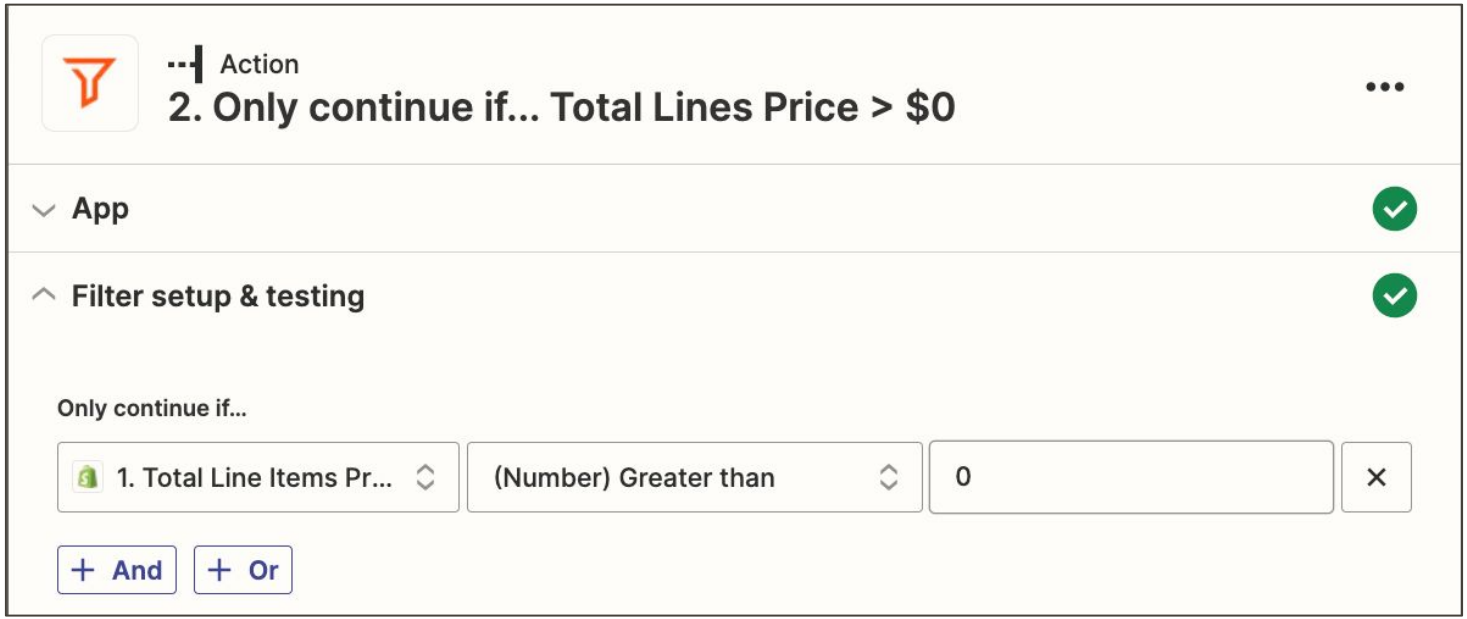
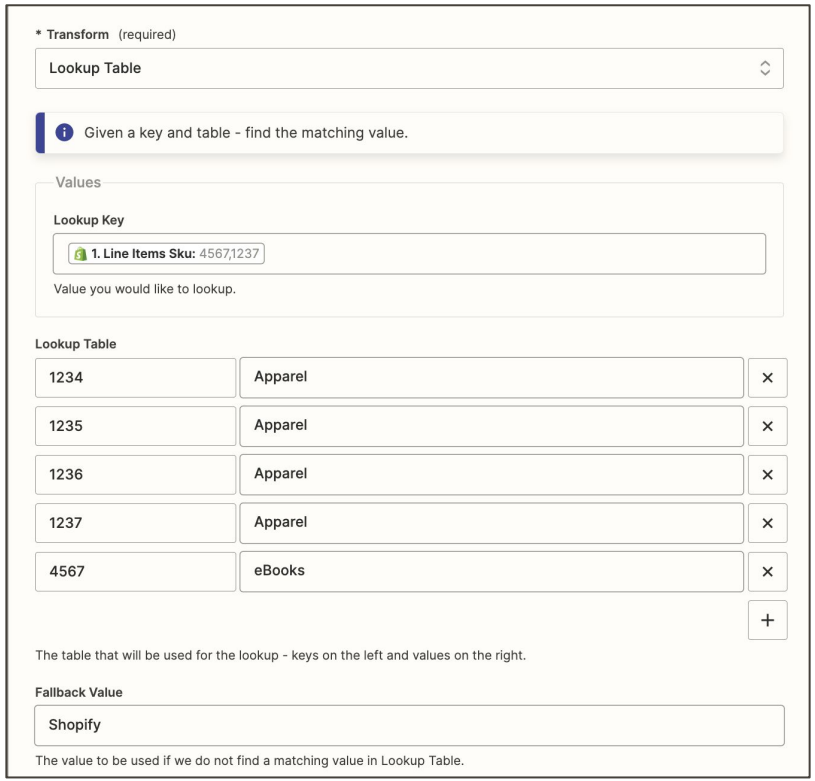
Filter

Dynamic Coding



Lookup

Dynamic coding



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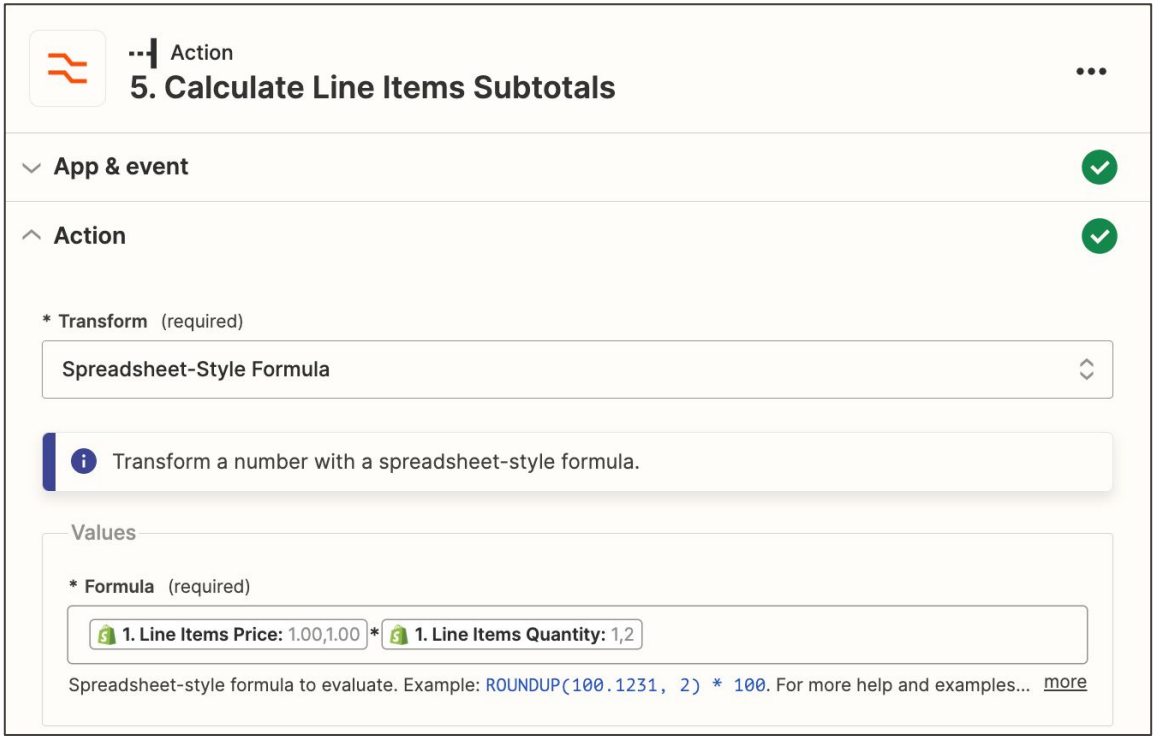
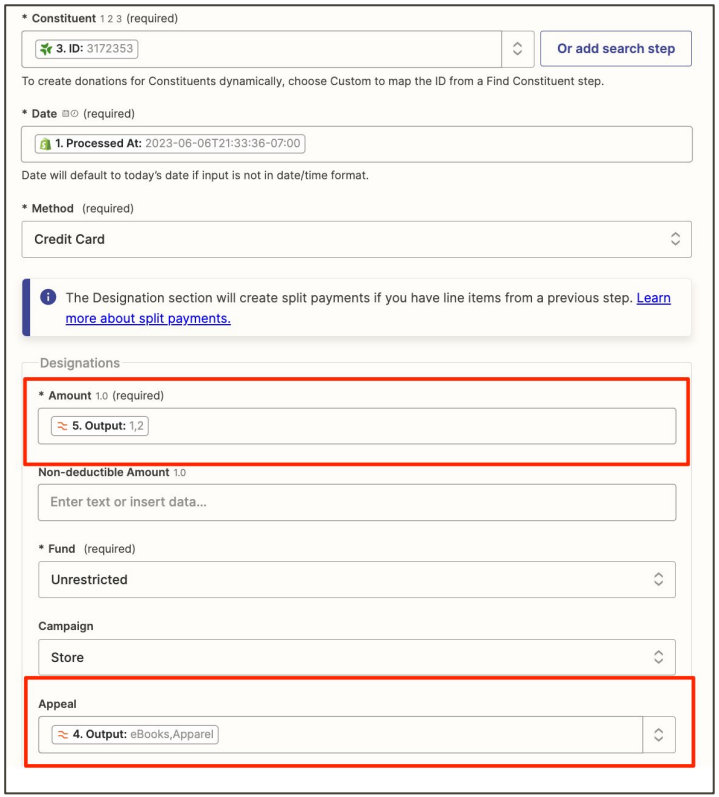
Calculate Line Items Subtotals

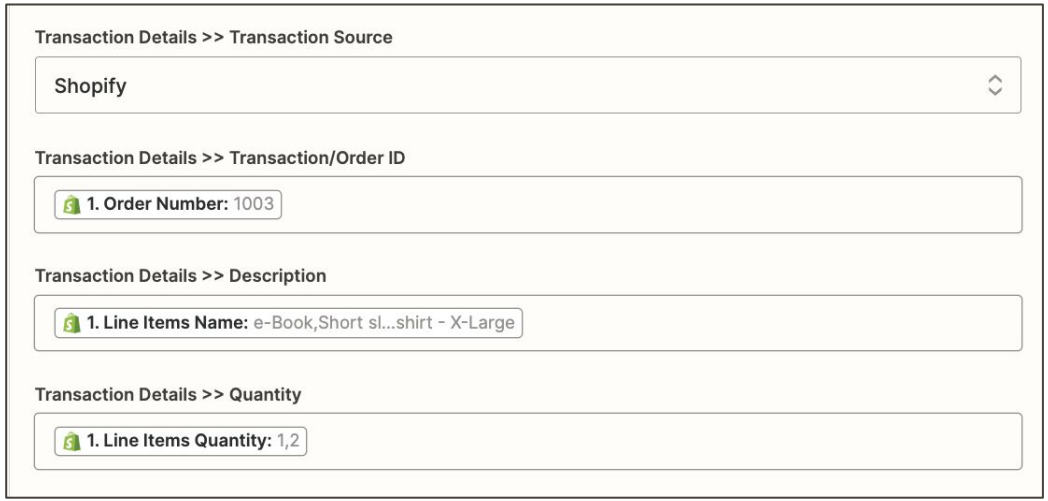
Dynamic coding



Create Donation

Dynamic coding





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.

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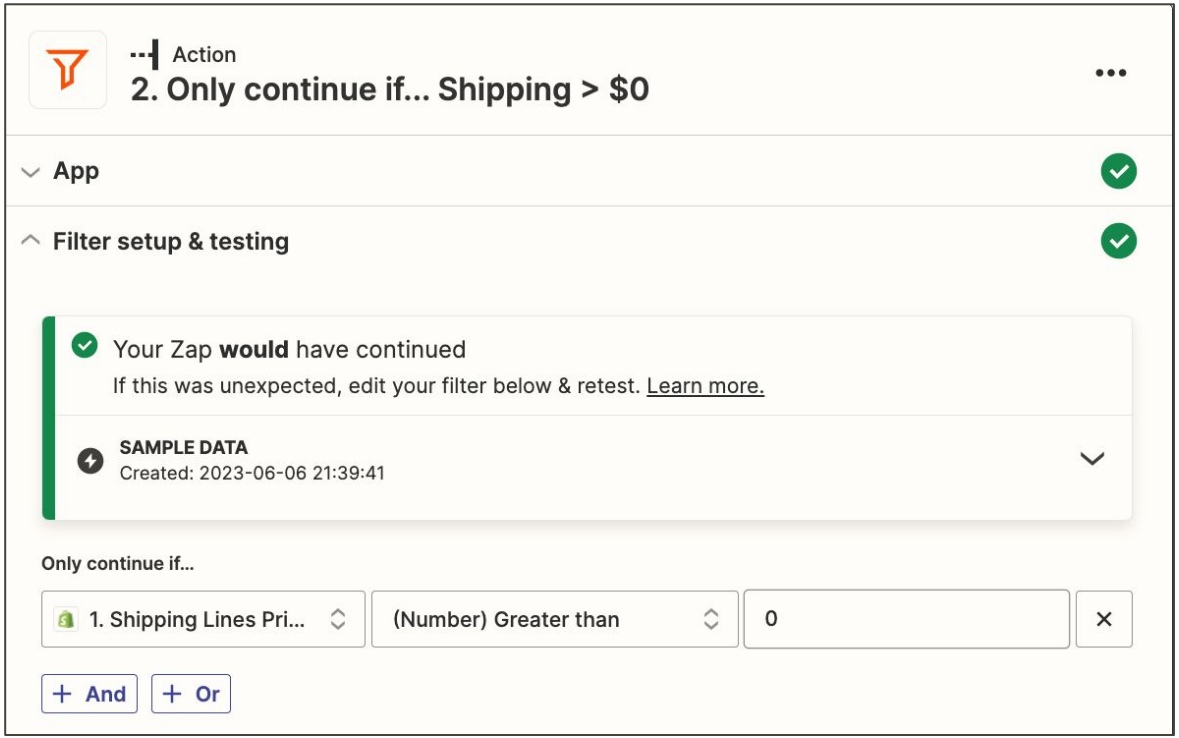
Filter

Shipping



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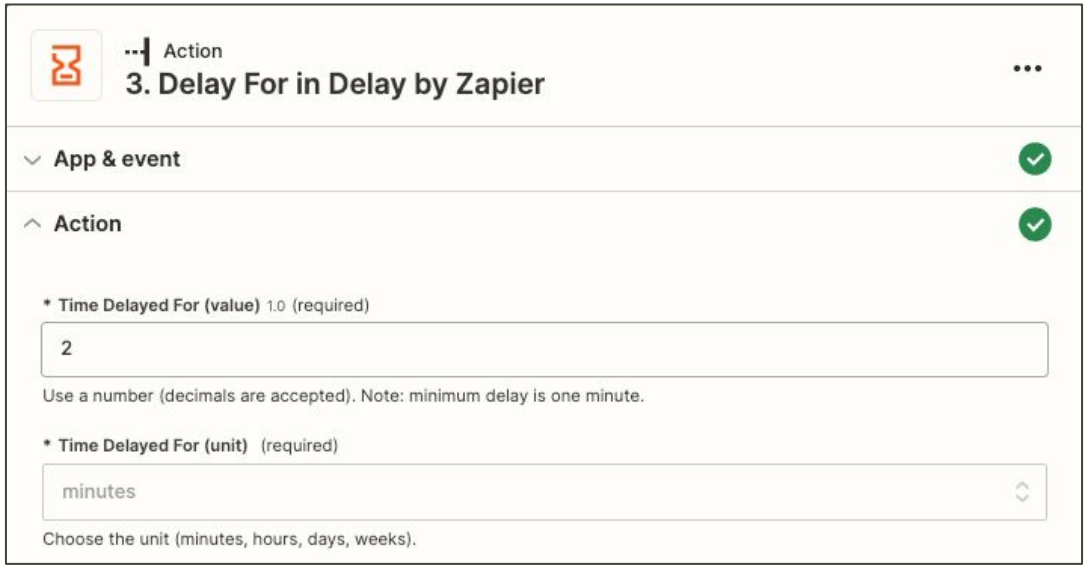
Delay

Shipping



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Shipping

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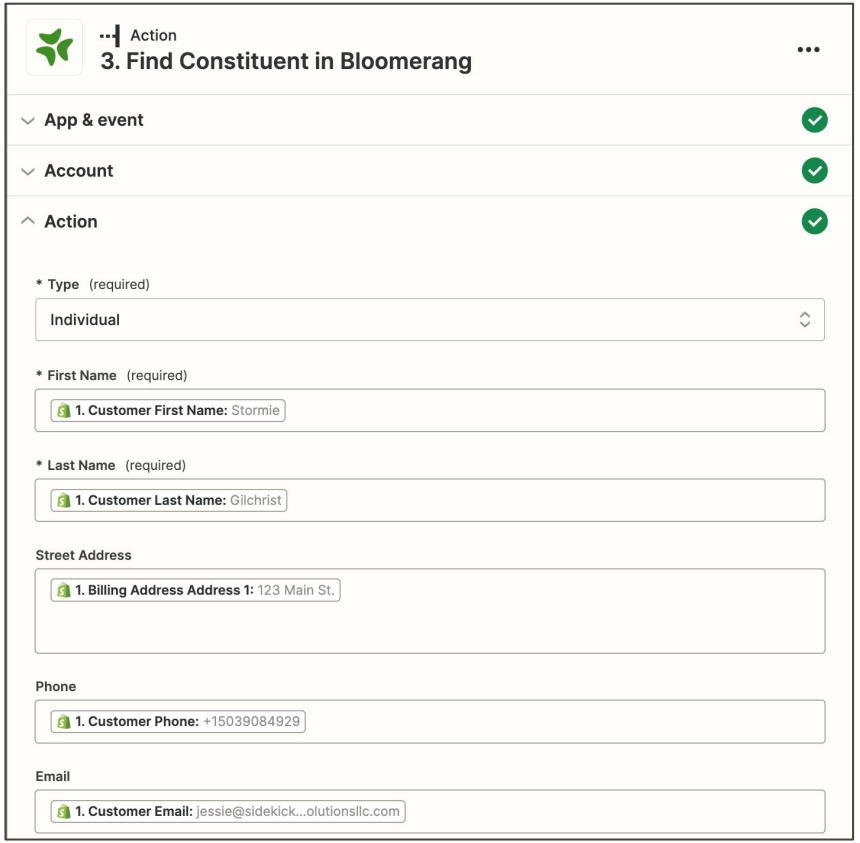

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Shipping

- Standard fields
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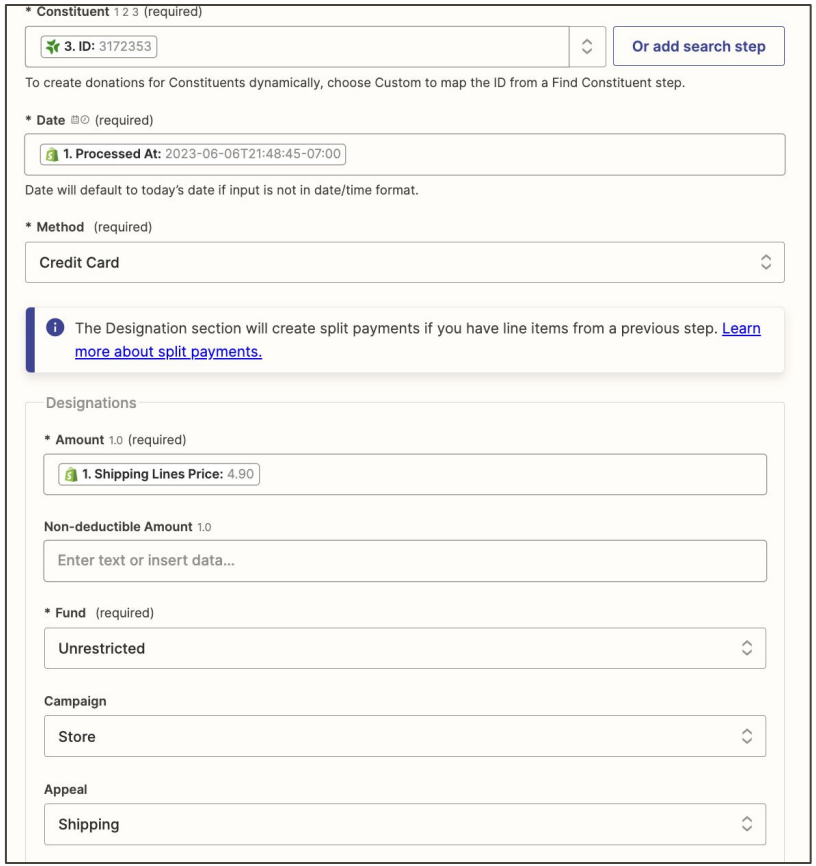
- Custom fields



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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

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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.

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Connect Bloomerang to Zapier

- Go to My Apps
- Click Add Connection
- Search for and select Bloomerang
- Grant access using your Bloomerang login credentials

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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

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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!

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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