How can the Microsoft Power Platform transform my business processes?

blackbaud®
DEVELOPERS' CONFERENCE
June 15–17, 2021

HOT TOPIC MEDLEY TRACK

BEN LAMBERT

Session Host: Trevor Kelly

Safe Harbor Statement

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Customization of Blackbaud Solutions

As a Blackbaud customer, your Authorized Support Contacts retain the responsibility for providing internal support for Customizations of your Blackbaud solutions by:

- Providing direct support to answer questions regarding Subscription functionality, internal business practices, and troubleshooting processes to Your Non-Authorized Users
- Providing direct support to answer questions regarding Customization specifications, features, intended usage, and Error correction and troubleshooting processes to Your Non-Authorized Users

@benjelambert

Hello! I'm Ben Lambert

Pronouns: ex. He/Him/His

HOMETOWN: CHINA GROVE, NC

AT BLACKBAUD: 27 YEARS

Multi-instrumentalist, Culinary enthusiast

RE:DOS, RE for Windows, RE7 Gift Module, Infinity Platform, Architect of SKY API, SKY Add-ins, and SKY Developer since 2014.

Passionate about helping customers leverage technology to solve problems!

In this session…

- *See solutions to real-world customer scenarios*
- *Show the power of "connected office" using Microsoft's Power Platform*
- *Take inspiration from implementations, use these techniques for other scenarios*

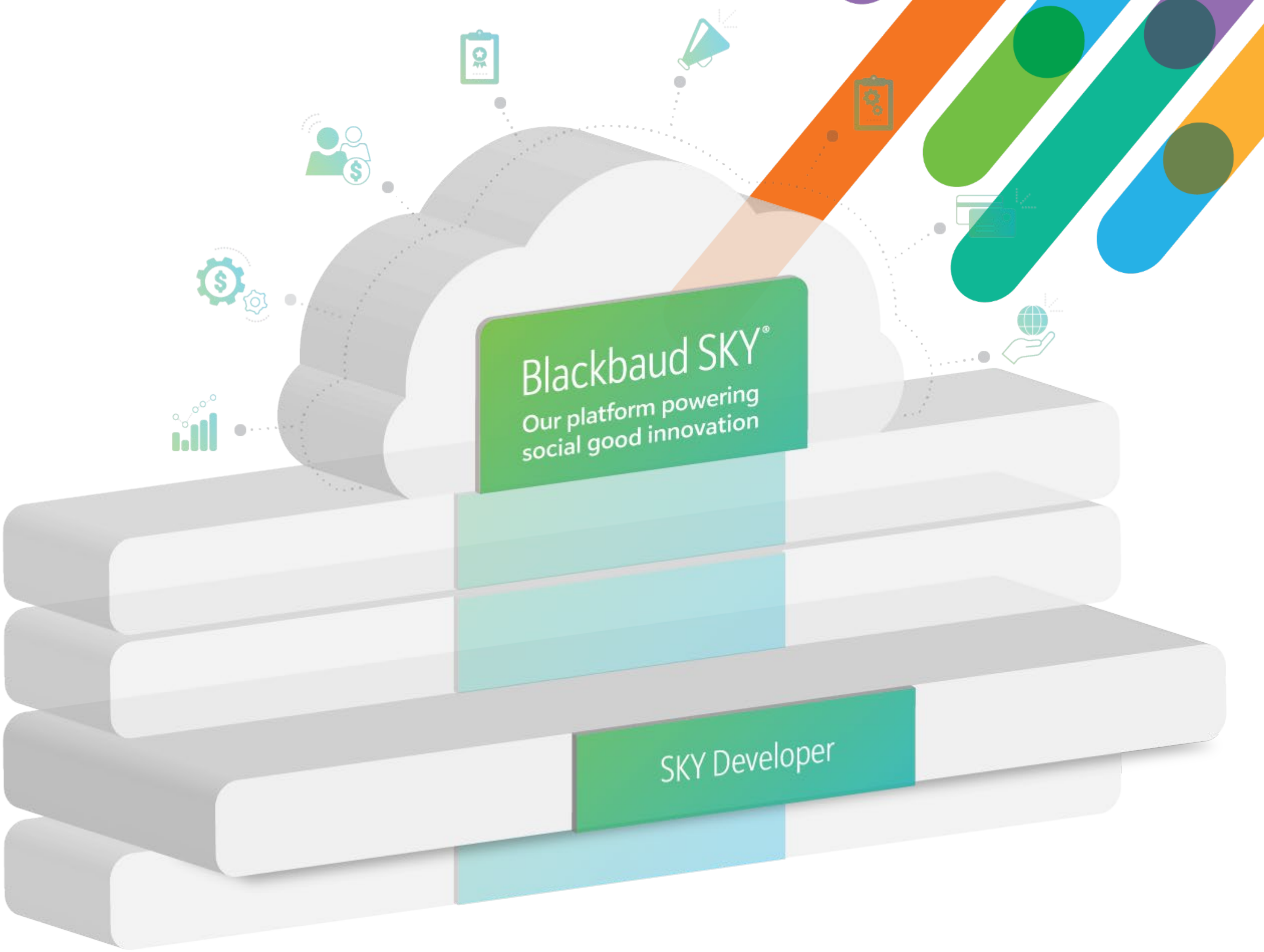
SKY Developer

The toolset to extend, customize, and contribute to the capabilities available on Blackbaud SKY, including:

SKY API®
Open, industry-standard REST APIs

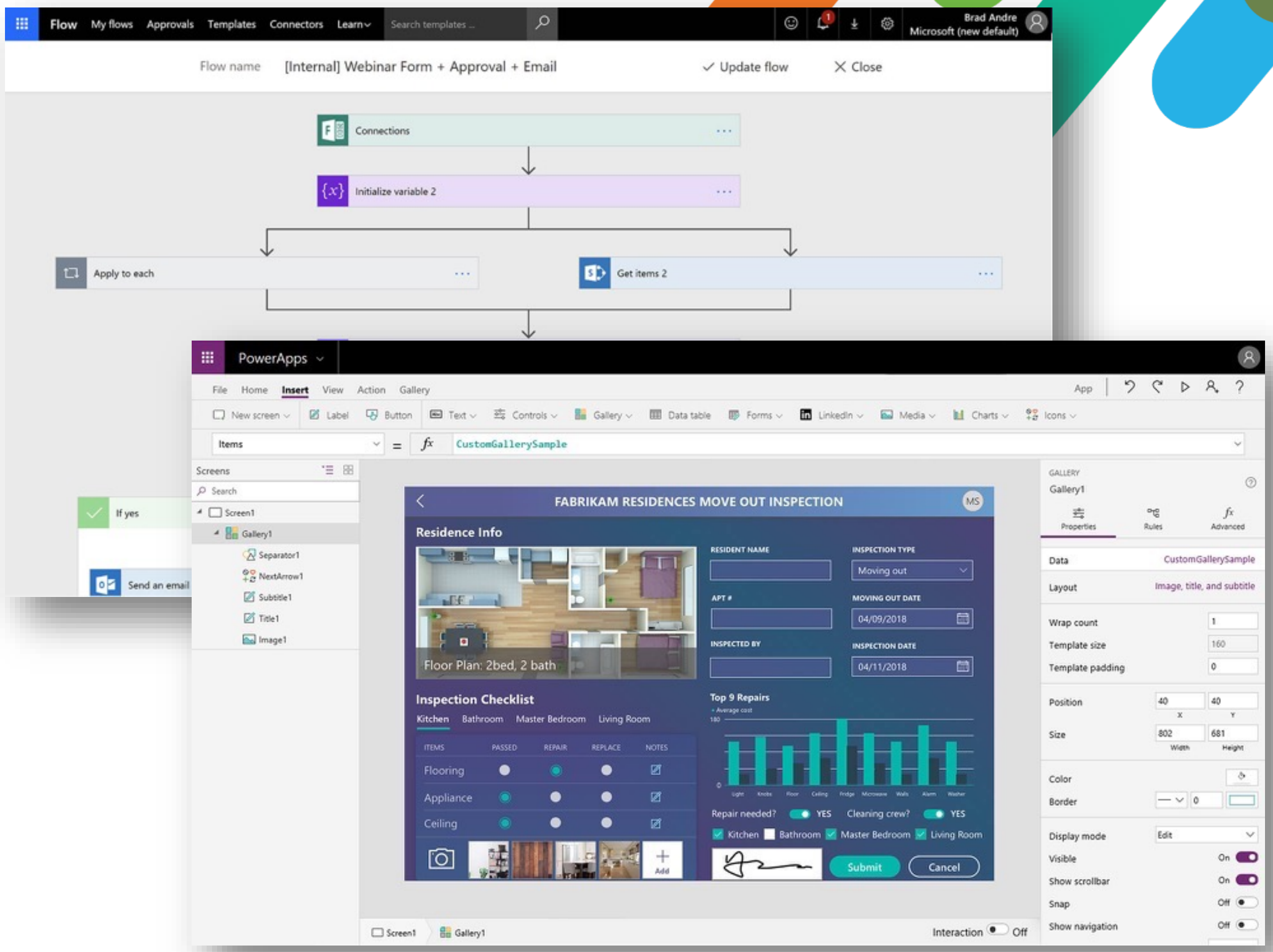
SKY Add-Ins™
Enables contextual experiences in Blackbaud solutions

SKY UX®
Open source, full component library



Microsoft Power Platform Connector for Raiser’s Edge NXT

- Powered by SKY API!
- MSFT Power Apps is a service that enables “citizen developers” to build apps for web and mobile.
- MSFT Power Automate is a service for automating workflows across a growing number of SaaS applications (nearly 500 connectors!).
- The certified Blackbaud Power Platform connector for Raiser’s Edge NXT enables customers to create apps and workflows with their Blackbaud data.



Raise your hand if you've...

- *Created a SKY Developer account?*
- *Made an API call?*
- *Created a flow using Power Automate?*
- *Created a Power App?*
- *Watched the Friends reunion special?*

"It sure was great to see everyone again...!"

– BenL ☺

Why automate?

Model your organization's unique business logic and custom workflows, which may span time and involve multiple people, machines, and other systems!

Represent your policies/procedures as a formal codified living artifact instead of a static, dusty manual sitting on a shelf that no one reads anyway!

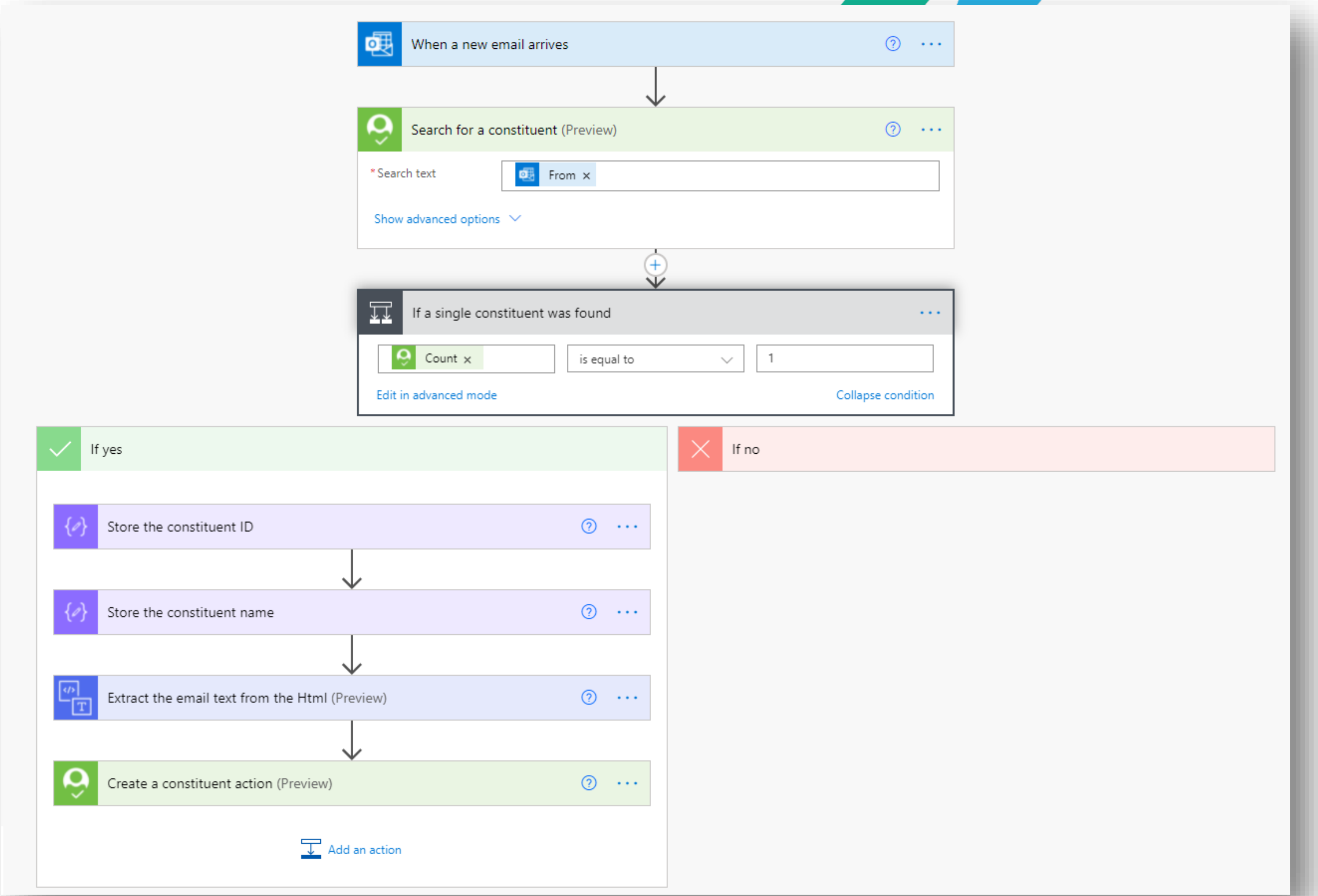
Remove surface area for human error and let "the cloud" manage things consistently and robustly going forward!

Customer scenario: Email integration

"Automatically record all incoming/outgoing emails to constituents as actions in Raiser's Edge NXT"

Overview

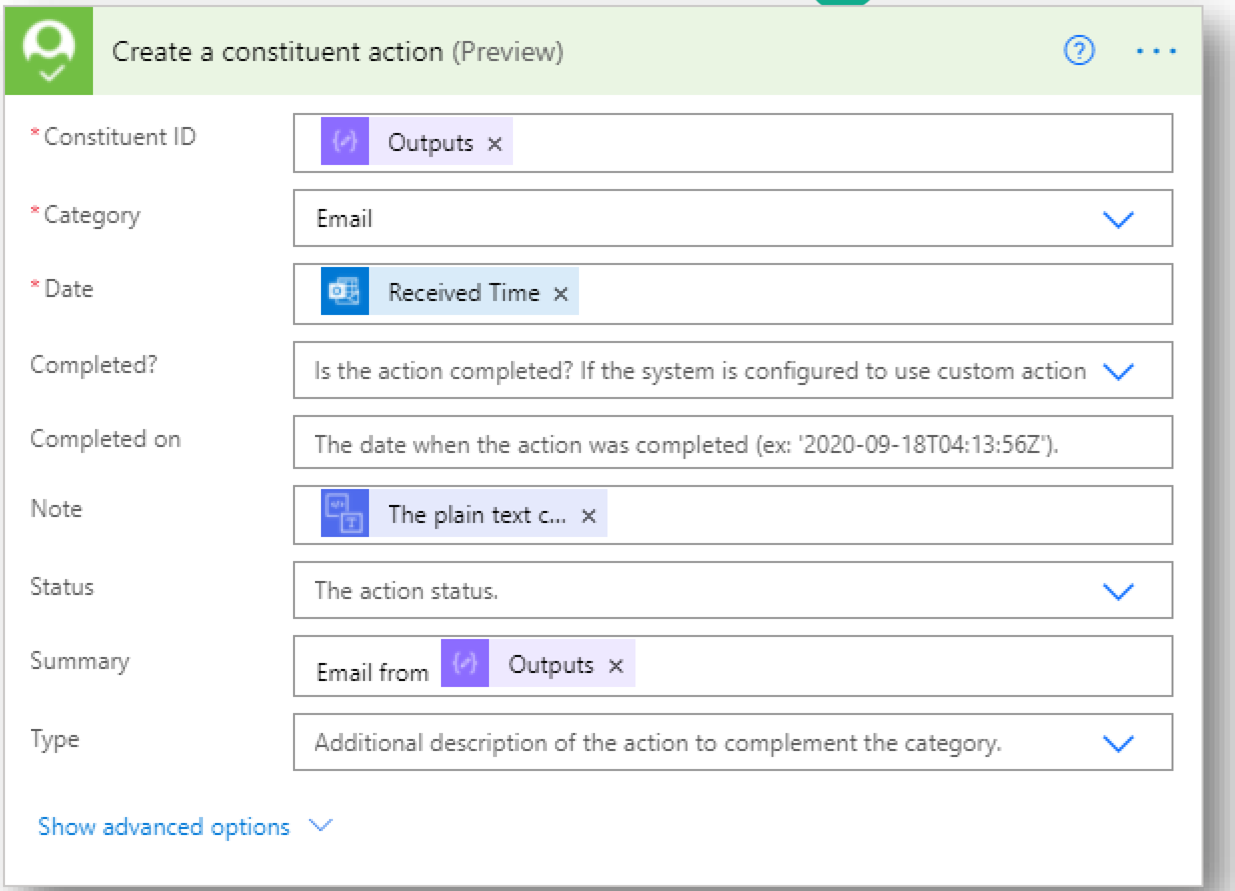
- *Use Microsoft's Power Automate engine with the Raiser's Edge NXT connector to build a workflow managed by "the cloud"*
- *When an email arrives in my inbox*
- *Search for the constituent (by email address)*
- *If a single record was found*
- *Extract the email body and record the text as an action in Raiser's Edge NXT*



Create an action

- *The Constituent ID comes from the search results*
- *The date comes from when the email was received*
- *The action note is the email body text extracted from the Html*

By itself, this is a really great feature…BUT…

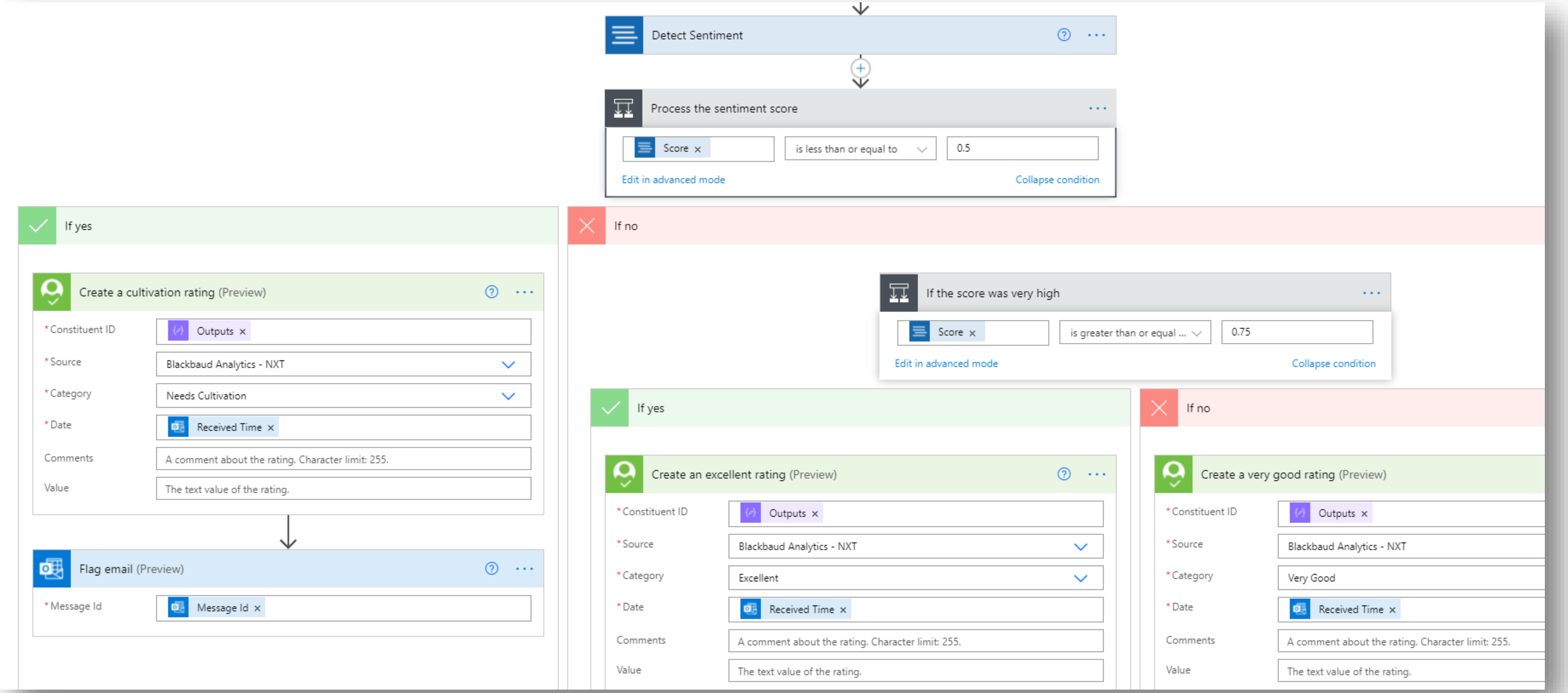


Go even further!

We invent possibilities.

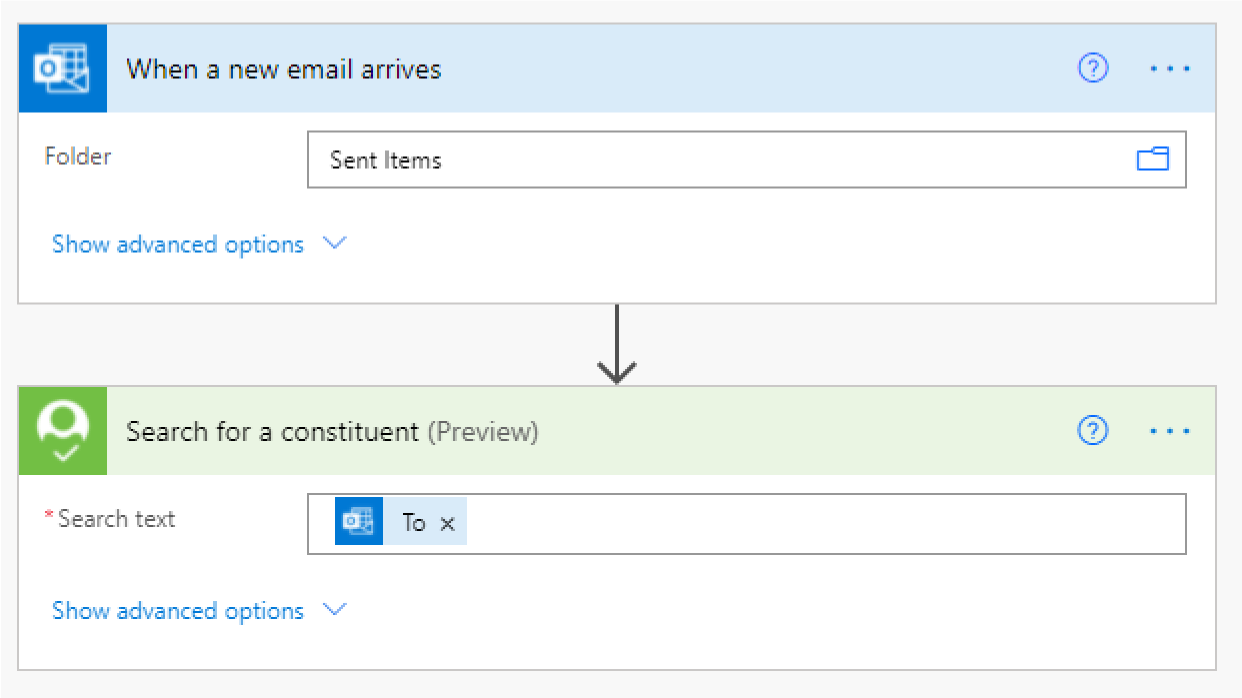
“Perform sentiment analysis on the email and use the score to assign a new constituent rating”

Create a constituent rating based on the score



What about outgoing emails?

- *Automatically record emails you send to constituents as actions on the constituent record*
- *Trigger the flow when a new email arrives in your "Sent items" folder*
- *Perform the constituent search using the "To:" email address*

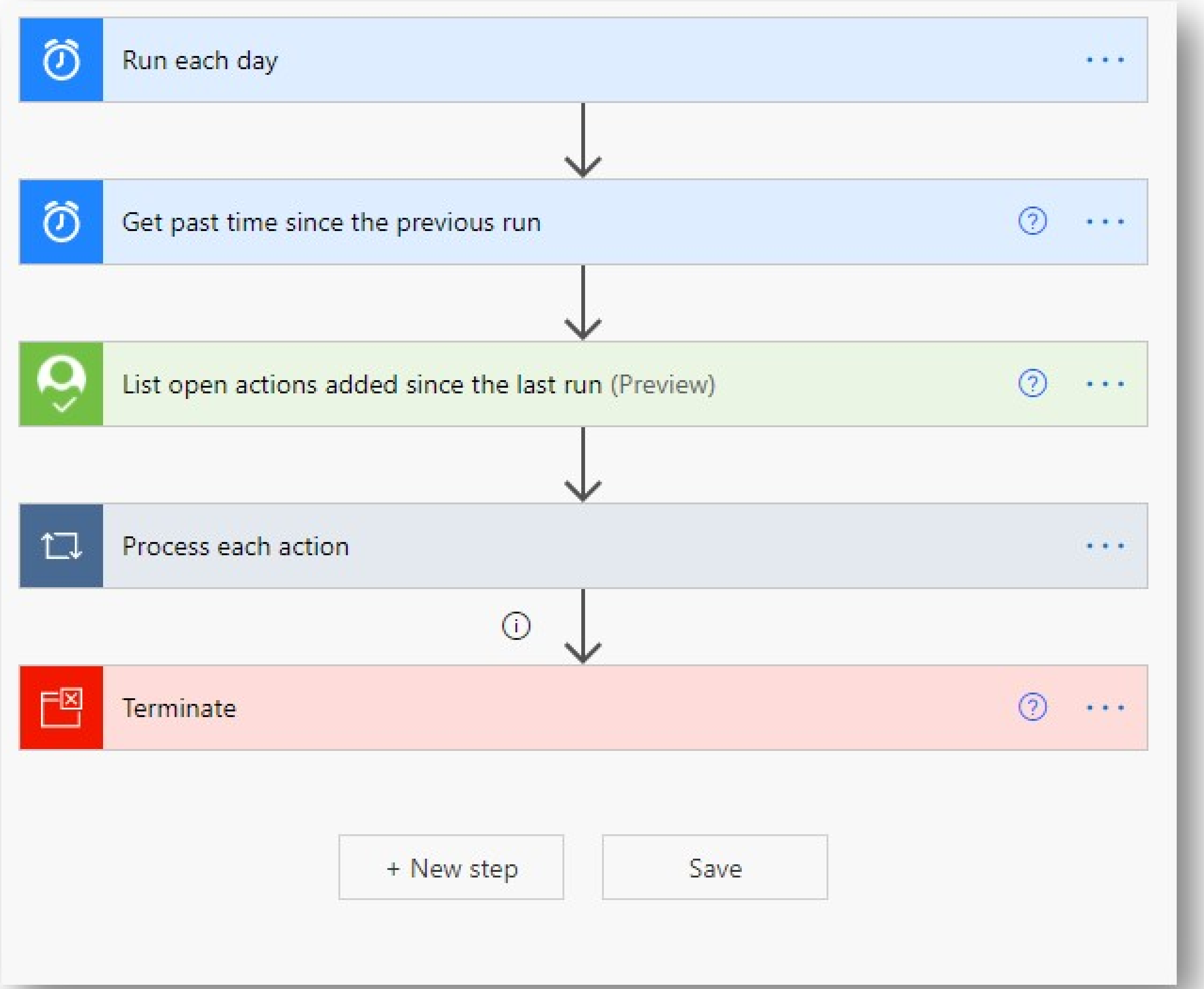


Customer scenario: Notify fundraisers about new actions

"When an action (of a specific type) is added to a prospect (with a specific status), send an email notification to the prospect's current and former relationship manager fundraisers"

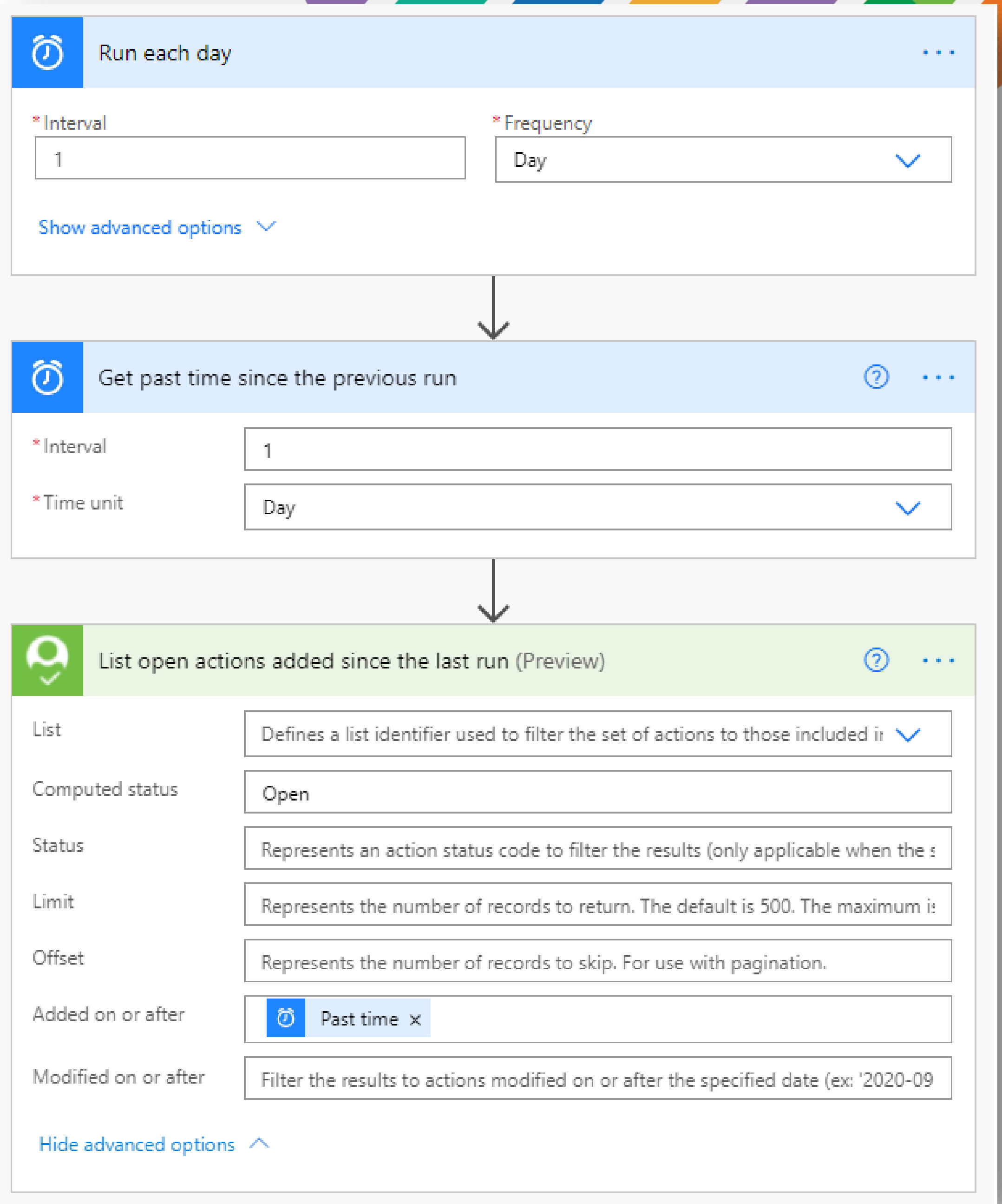
Overview

- *Each day, look for actions added since the last run*
- *For each action, look up the constituent's assigned fundraisers*
- *Send each fundraiser an email to let them know an action was added for one of their assigned constituents*



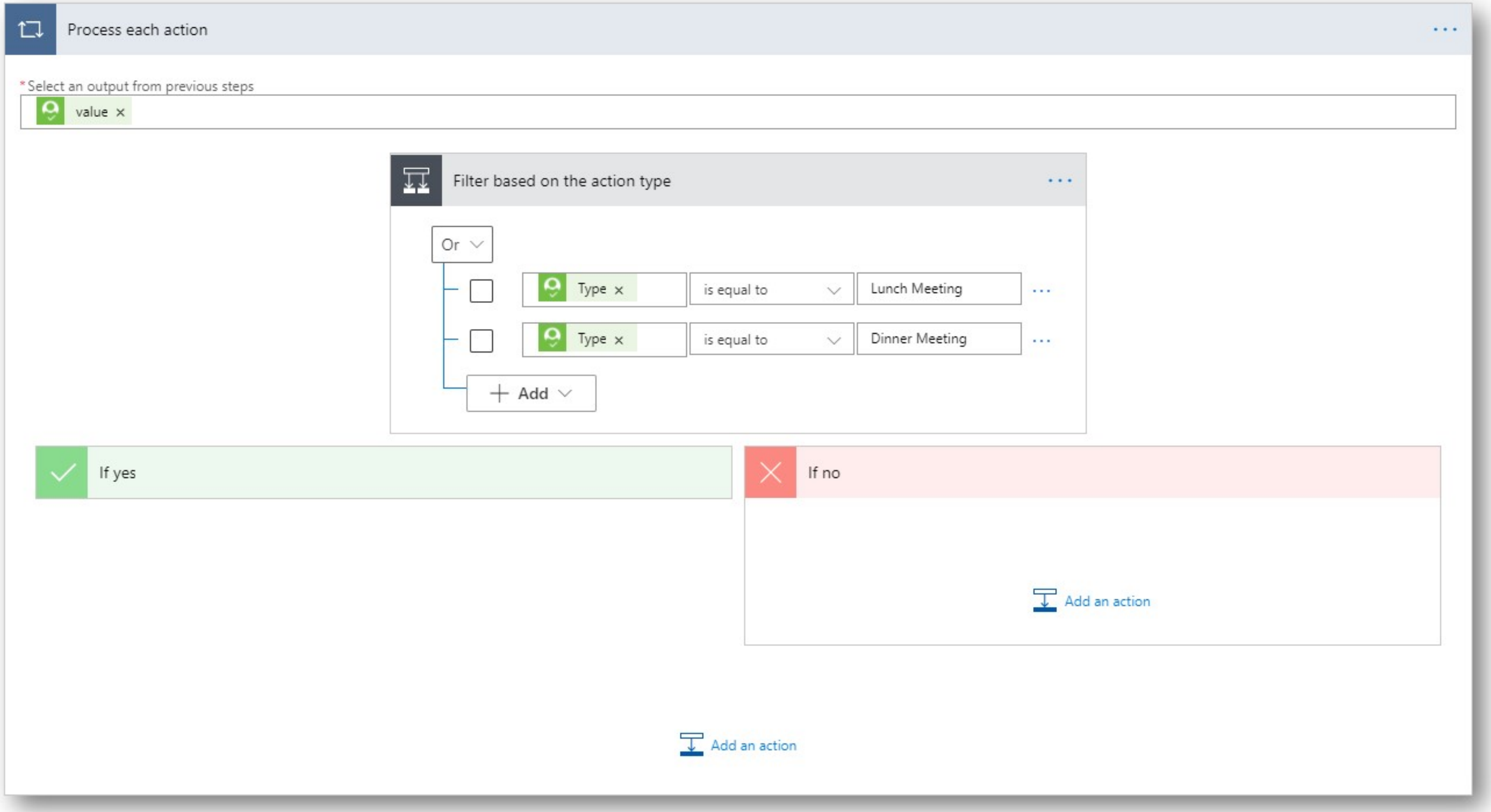
Initial trigger

- *Run each day at a specified time*
- *Calculate the time window since the last run*
- *List open actions added since the last run*



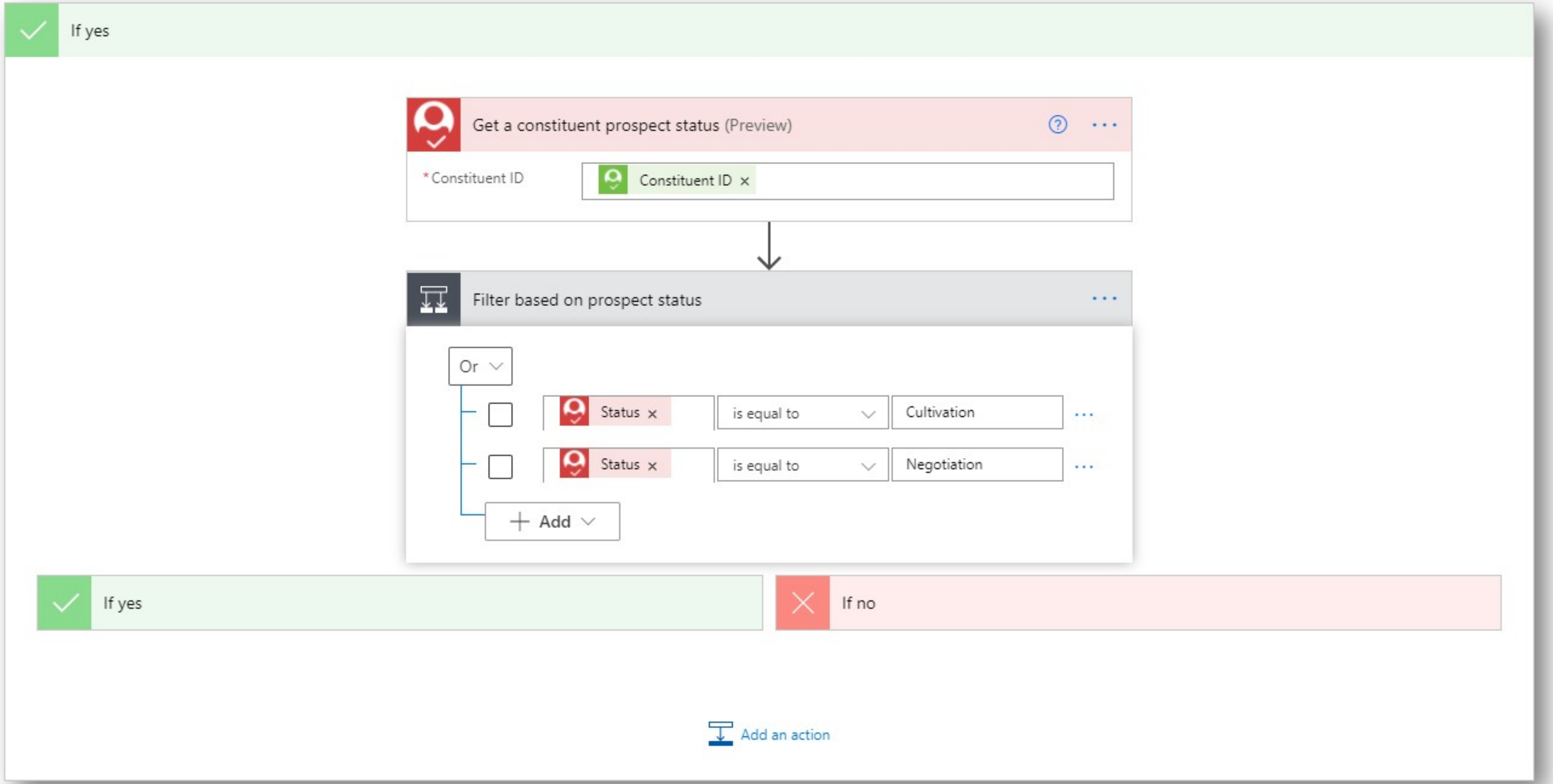
Filter action types

- *Express any complex filter logic needed*
- *Rich Boolean logic is possible through the Condition action*



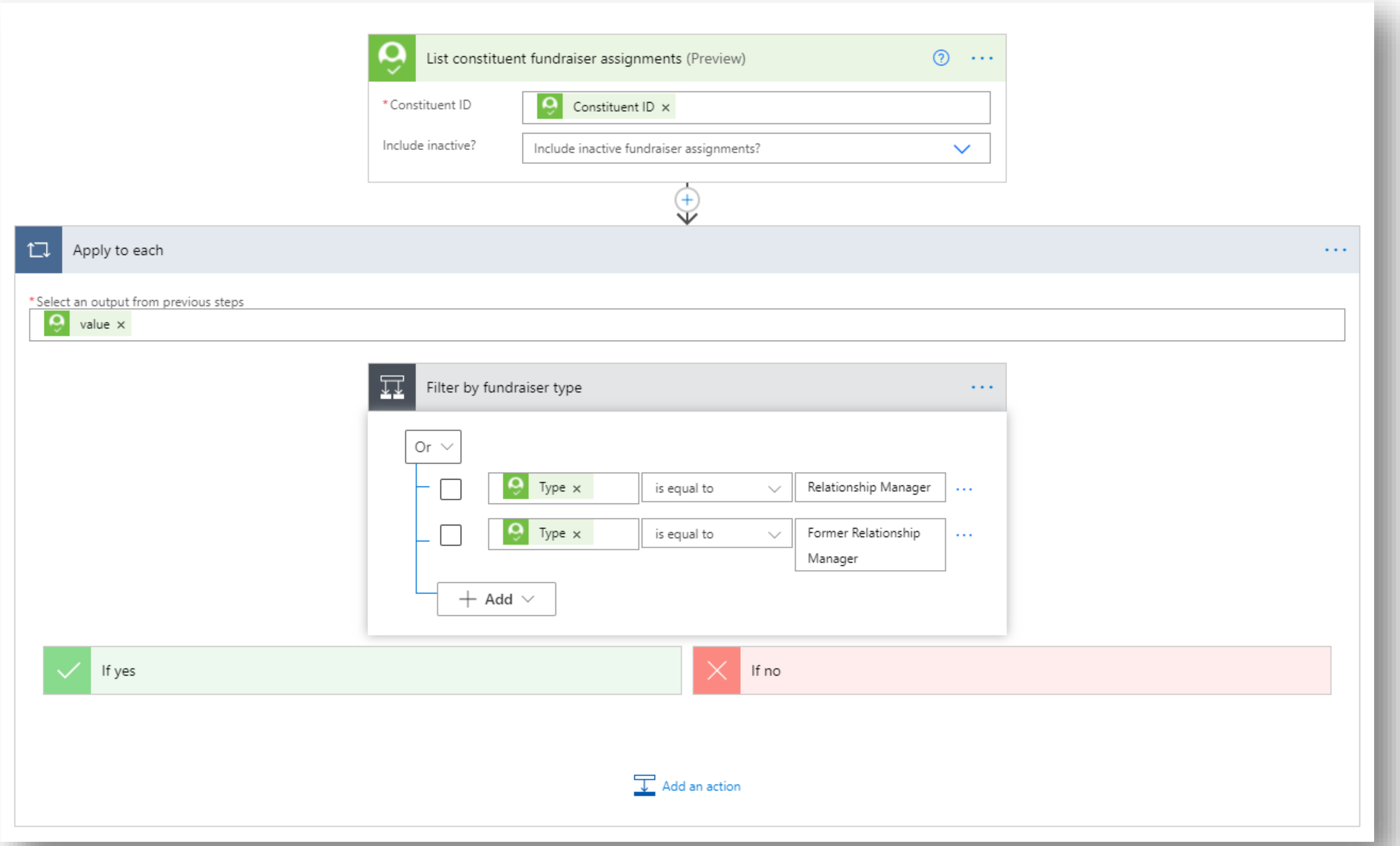
Filter prospect status

- *Determine the constituent's prospect status*
- *Apply filters based on the prospect status*



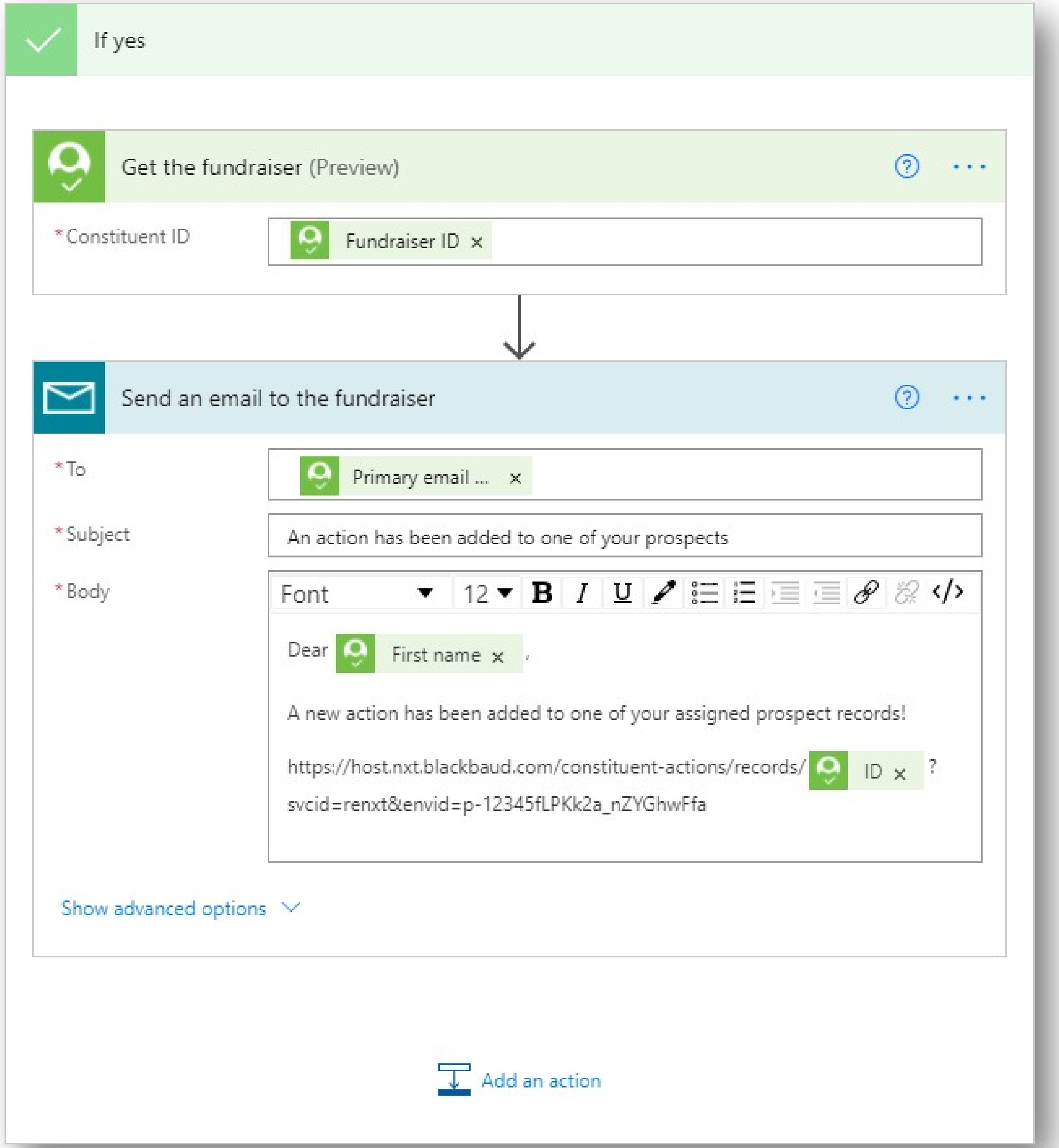
Filter by fundraiser type

- *List the constituent's fundraiser's*
- *Apply filters based on the fundraiser type*



Notify the fundraiser

- *Get the email address from the fundraiser's constituent record*
- *Send an email to the fundraiser, including a link to the action within NXT*



Email notification

An action has been added to one of your prospects

MP Microsoft Power Apps and Power Automate <microsoft@powerapps.

To Ben Lambert

Reply | Reply All | Forward | ...

Sat 04/17/2021 10:00 AM

Dear Benjamin,

A new action has been added to one of your assigned prospect records!

https://host.nxt.blackbaud.com/constituent-actions/records/21385?svcid=renxt&envid=p-12345fLPKk2a_nZYGhwFfa

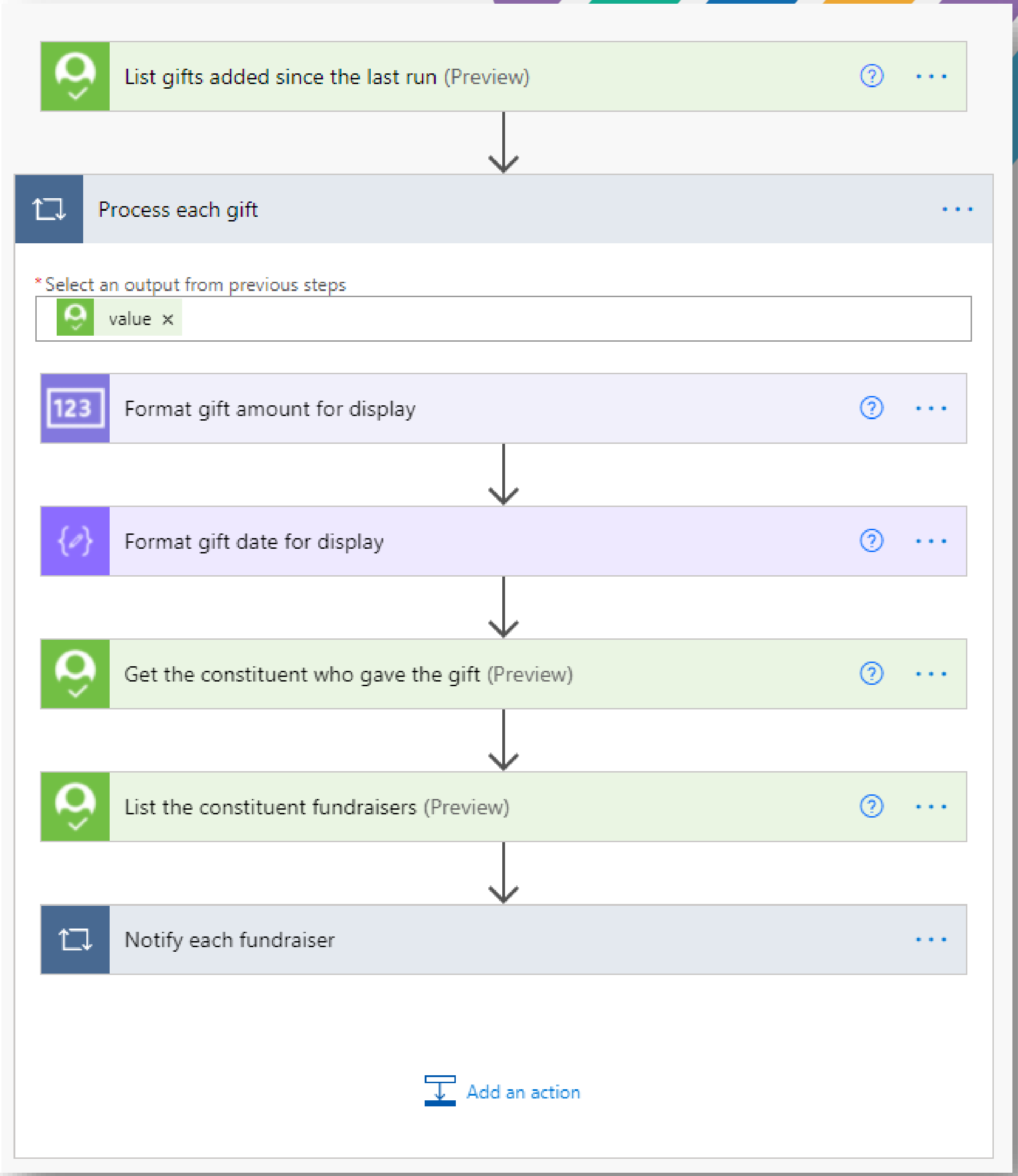
If you want to unsubscribe from these emails, please use this form.

Customer scenario: Notify fundraisers about new gifts

"Notify a constituent's assigned fundraiser(s) when a gift is given."

Overview

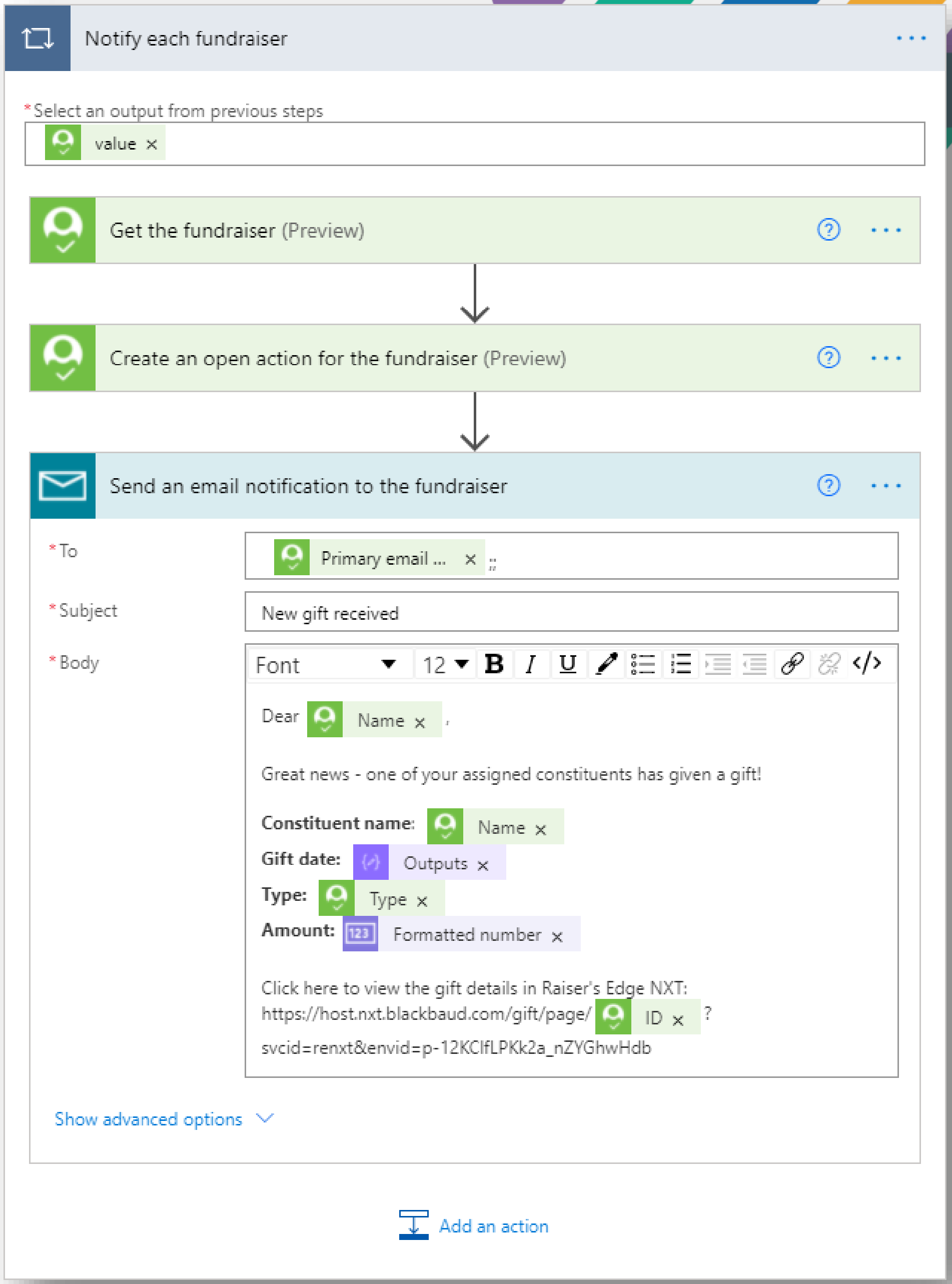
- *Each day, look for gifts added since the last run*
- *For each gift, look up the constituent's assigned fundraisers*
- *Send each fundraiser an email to let them know a gift was received from one of their assigned constituents*



Notify the fundraiser

- *Load each fundraiser's constituent record to get the email address*
- *Create an open action on the fundraiser's constituent record so it shows up in the Work Center area*
- *Send an email to the fundraiser, including a link in NXT to the gift that was received.*

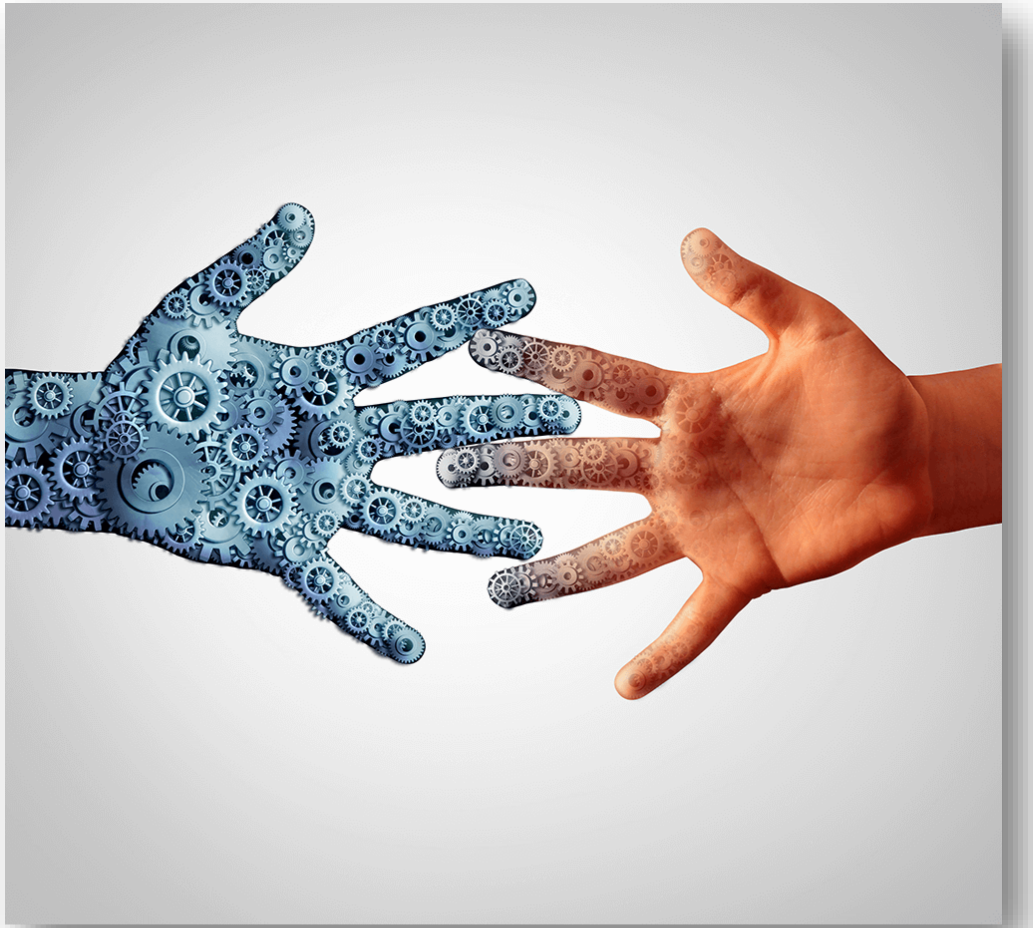
Makes your CRM work smarter – fundraisers (and their managers) see this activity when logged into Raiser's Edge NXT!



Customer scenario: Thank-you processing

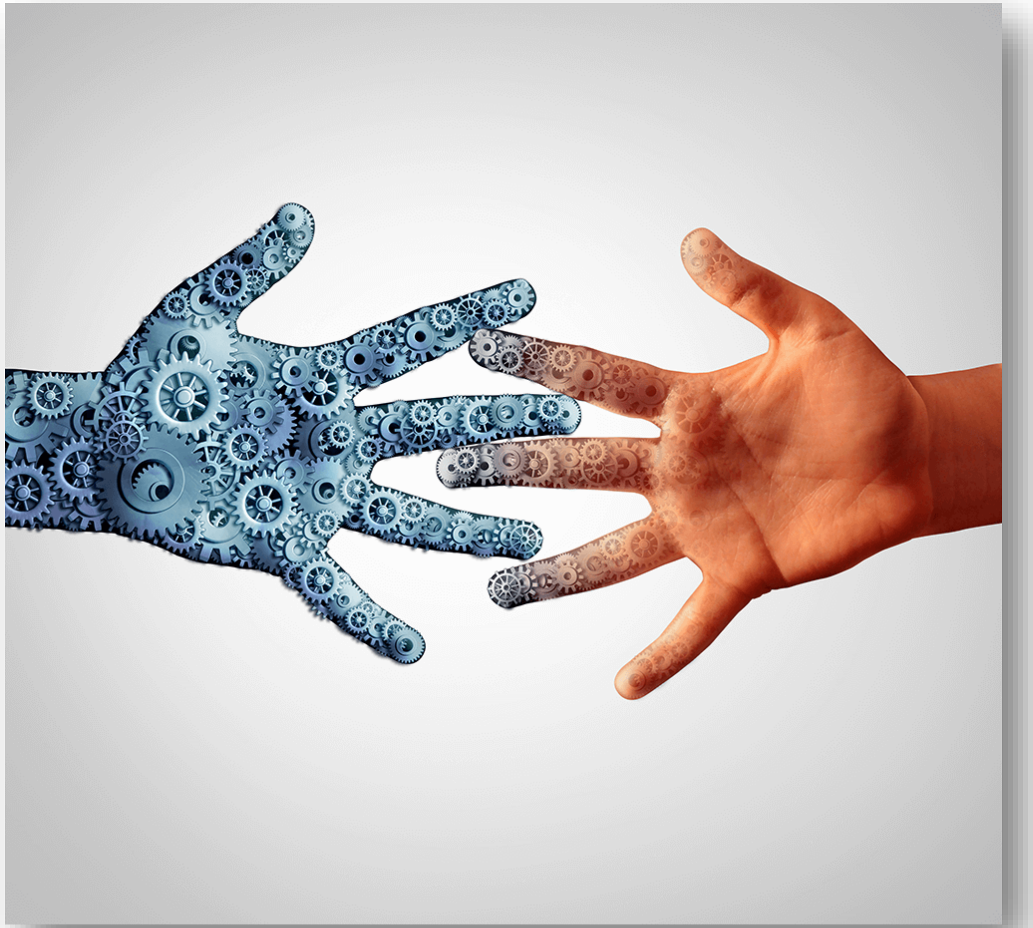
"Thank a donor when a gift is given by sending them an email (if allowed) or by making a phone call (if no email defined), or by sending a handwritten letter (if an address is available)."

Human Interaction!



- *Sometimes, it's not "good enough" to just send a notification, we need the flow to engage a human to take some action.*
- *The flow must pause and wait for that action to be completed before continuing (and potentially branch logic based on the outcome of the action)*
- *This "pause and wait for a human" can be implemented using a "Approval task"*

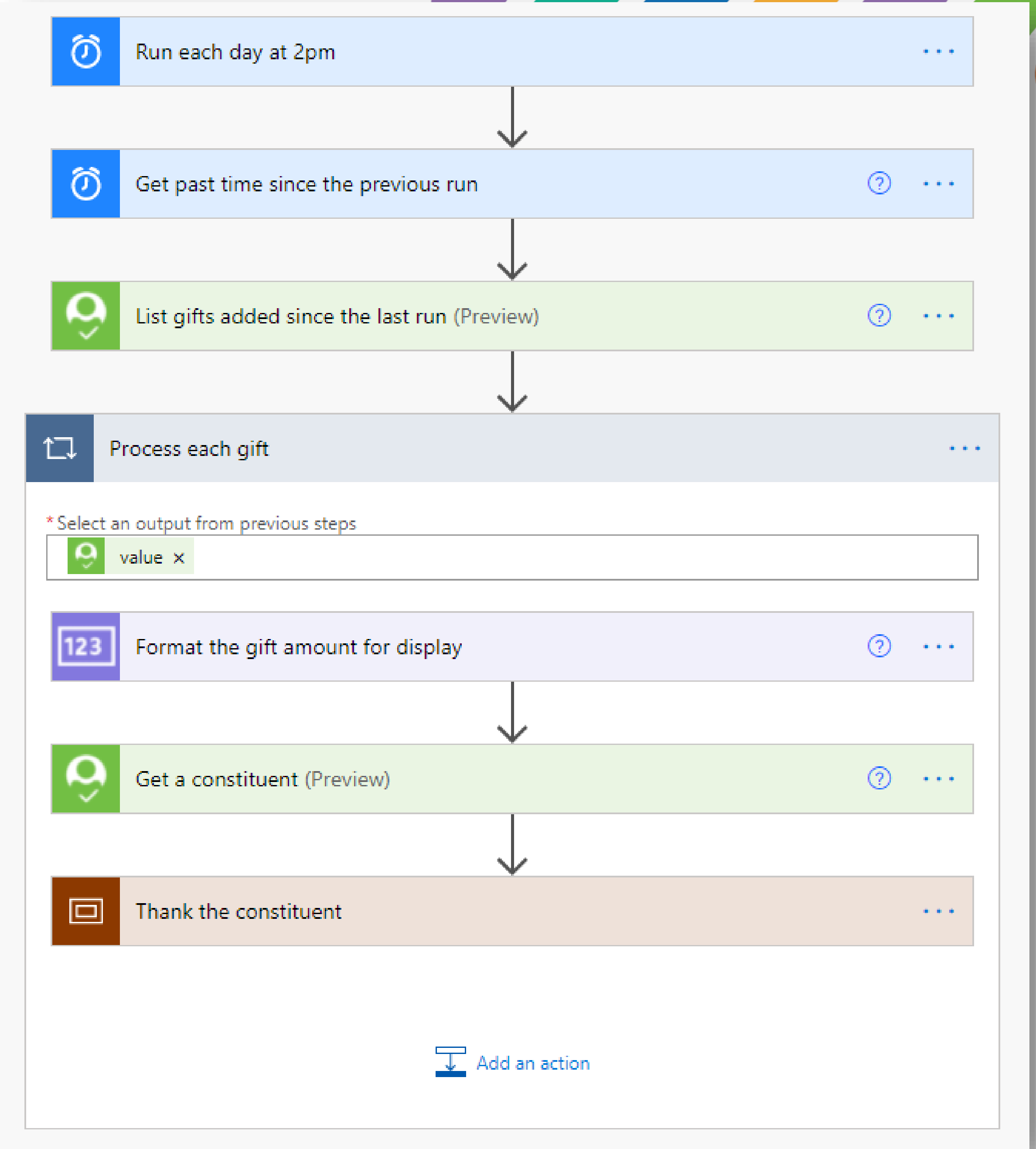
Human Interaction!



- *Sending an email can be automated*
- *But a human must "make a phone call" or "send a hand-written letter"*
- *This may take a few days to complete (vacation, workload, etc.)*

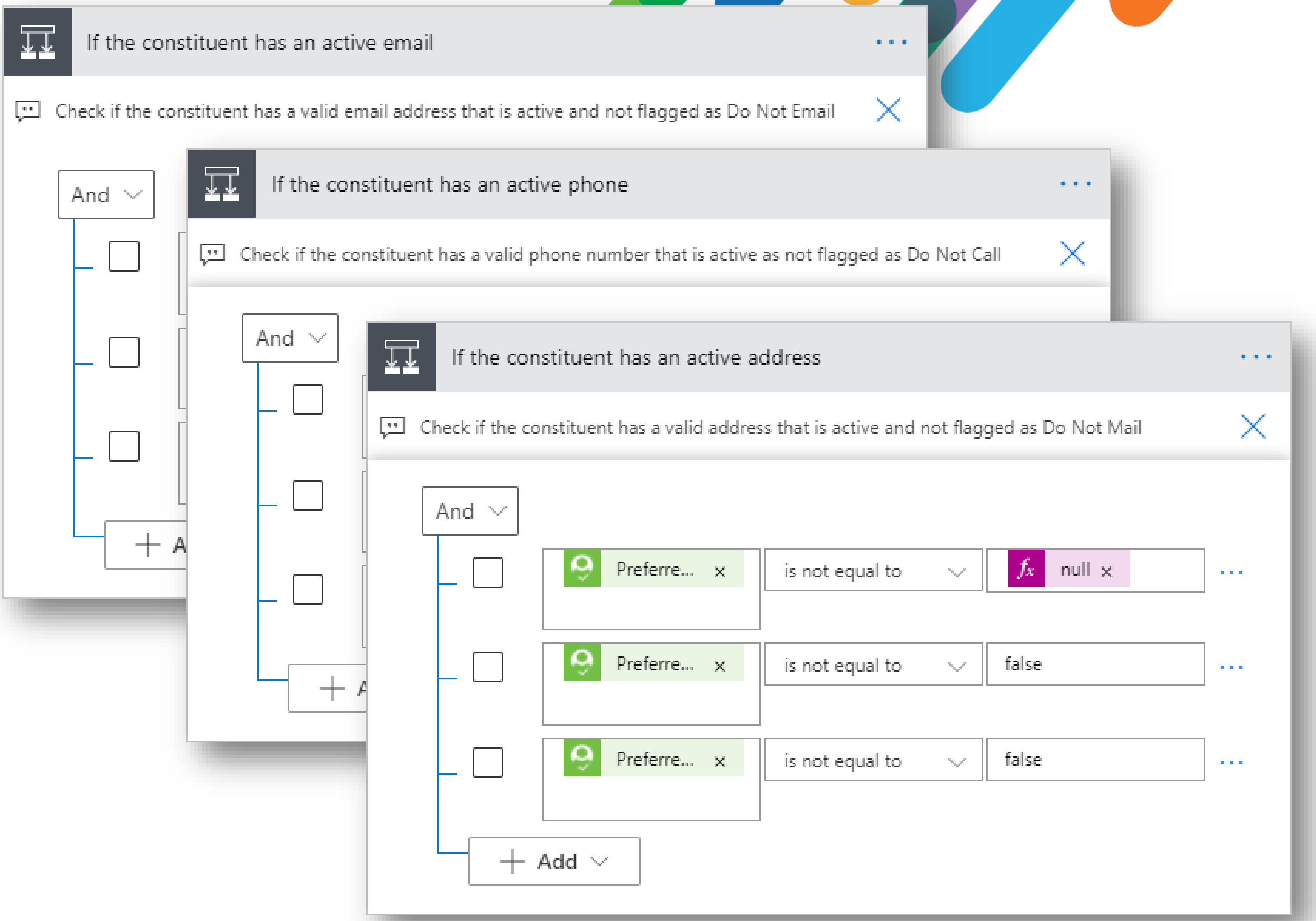
Overview

- *Each day, list the gifts added since the last run (filter to only **Not Acknowledged** gifts)*
- *If the constituent has an active email (not marked as **Do Not Email**), send an automatic email thank-you*
- *Otherwise, if the constituent has an active phone (not marked as **Do Not Call**), assign a task to someone to make a thank-you call*
- *Otherwise, if the constituent has an active address (not marked as **Do Not Mail**), assign a task to someone to send a handwritten thank-you letter*



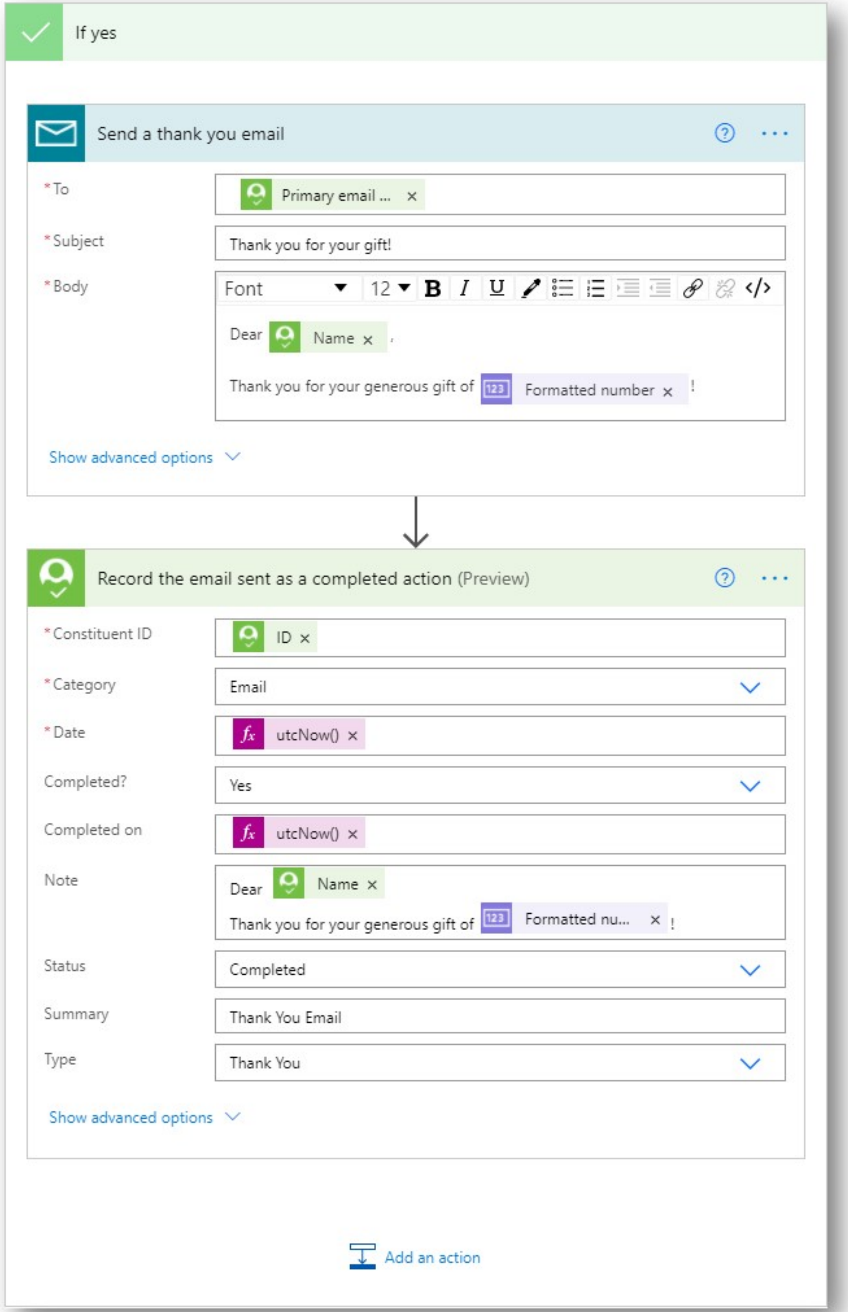
Conditions

- *Does the constituent have an active email?*
- *Does the constituent have an active phone number?*
- *Does the constituent have an active address?*



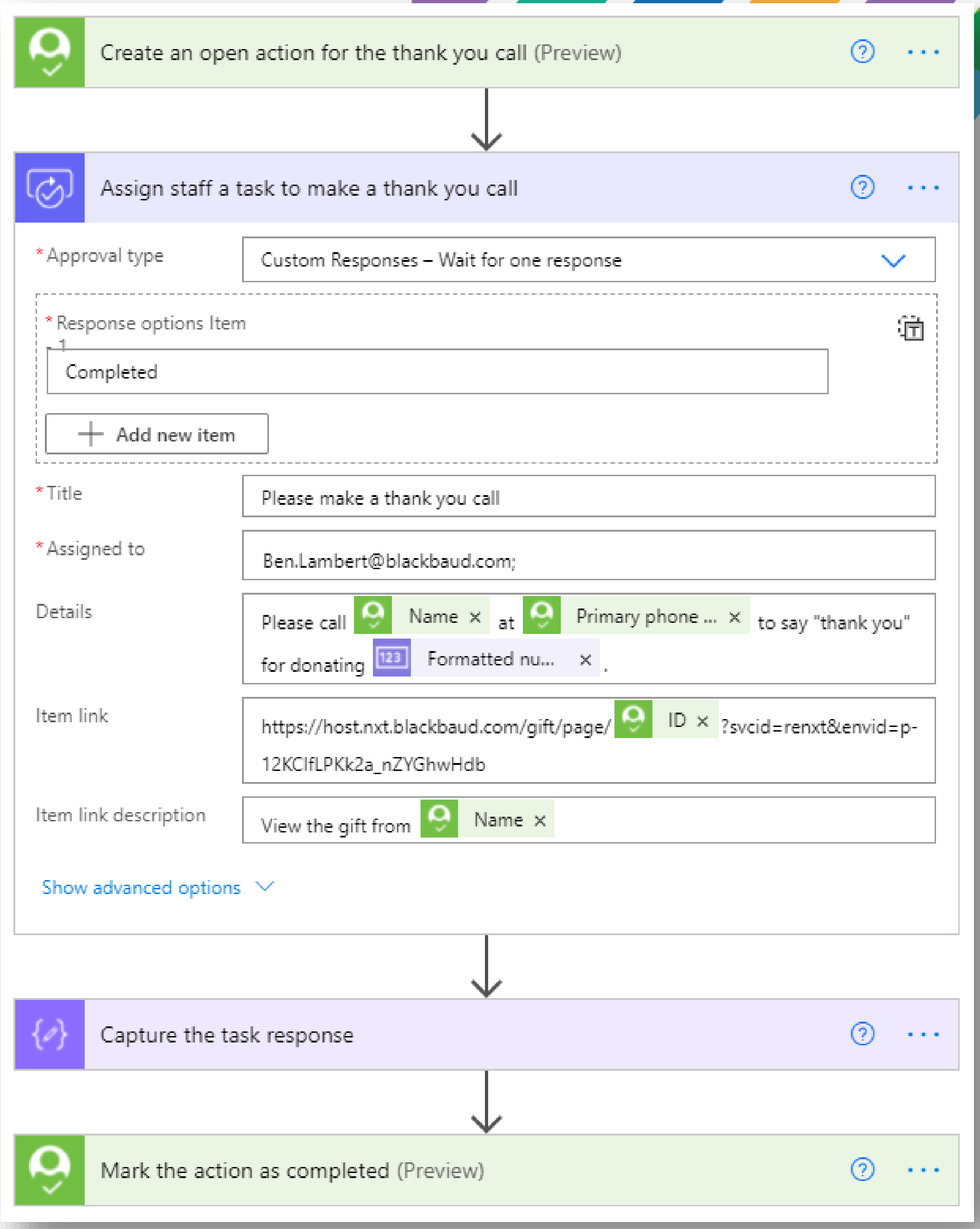
For an active email…

- *If the constituent has an active email (not marked as **Do Not Email**), send an automatic email thank-you*
- *Record the email sent as a "Completed" action*
- *No human interaction needed for this branch*



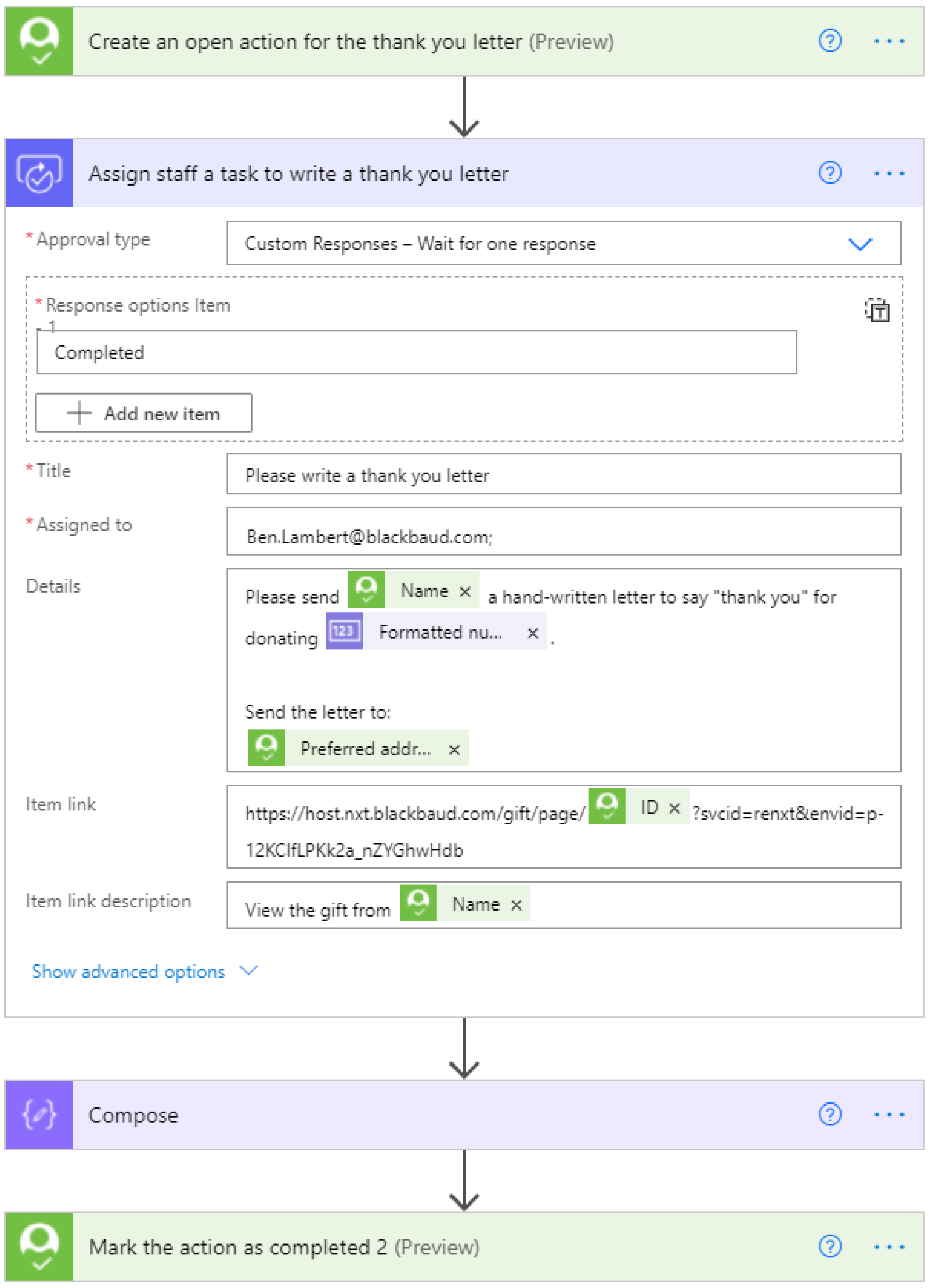
For an active phone…

- *If the constituent has an active email (not marked as **Do Not Email**), create an "Open" action in NXT*
- *Assign a task to another staff member to call the constituent to say thank you*
- *Wait until the task is Completed, then update the action to be "Completed", and include any notes captured when performing the task (known as "responses")*



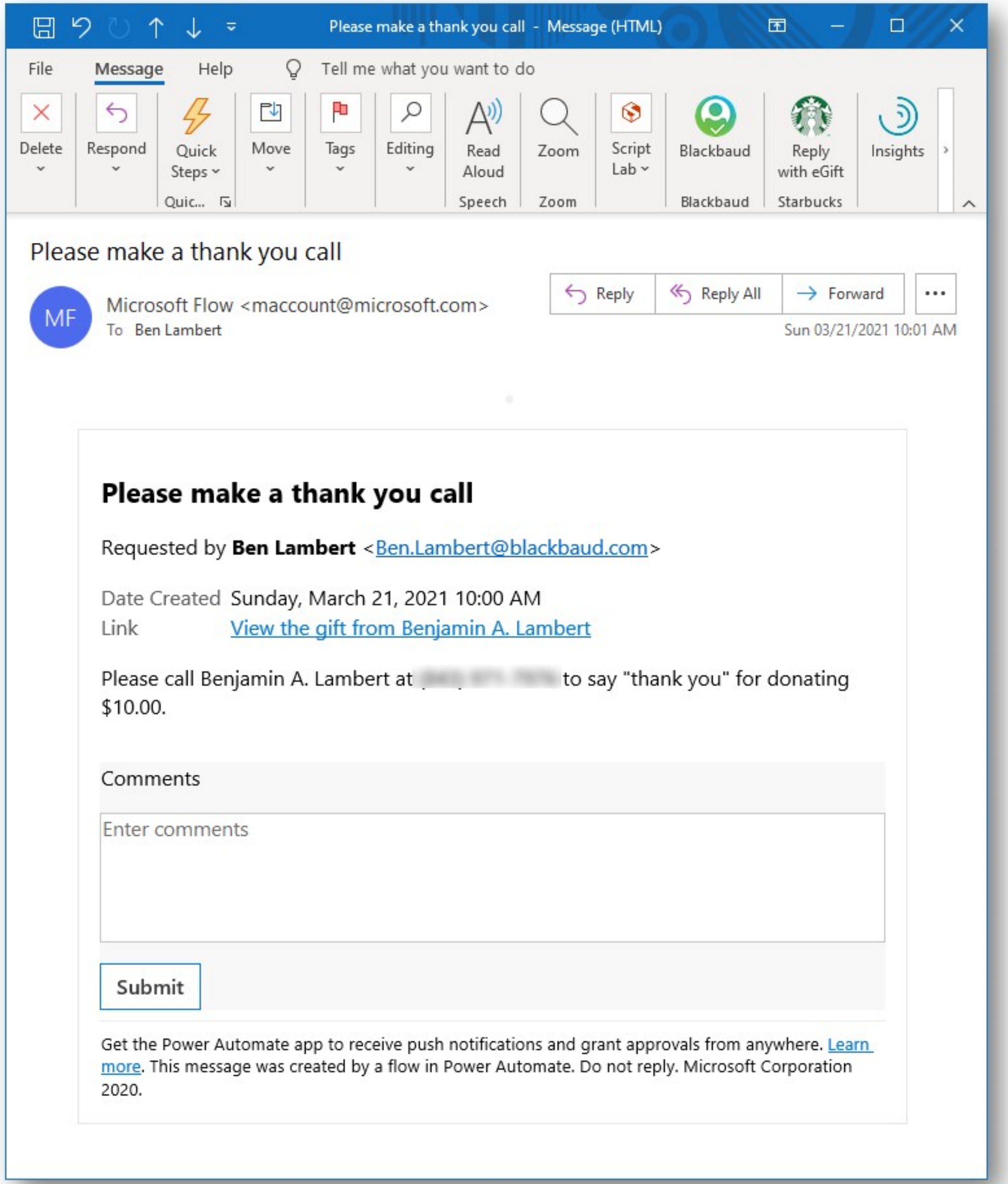
For an active address…

- *If the constituent has an active address (not marked as **Do Not Mail**), create an “Open” action in NXT*
- *Assign a task to another staff member to send a handwritten thank-you letter.*
- *Wait until the task is Completed, then update the action to be “Completed”, and include any notes captured when performing the task (known as “responses”)*

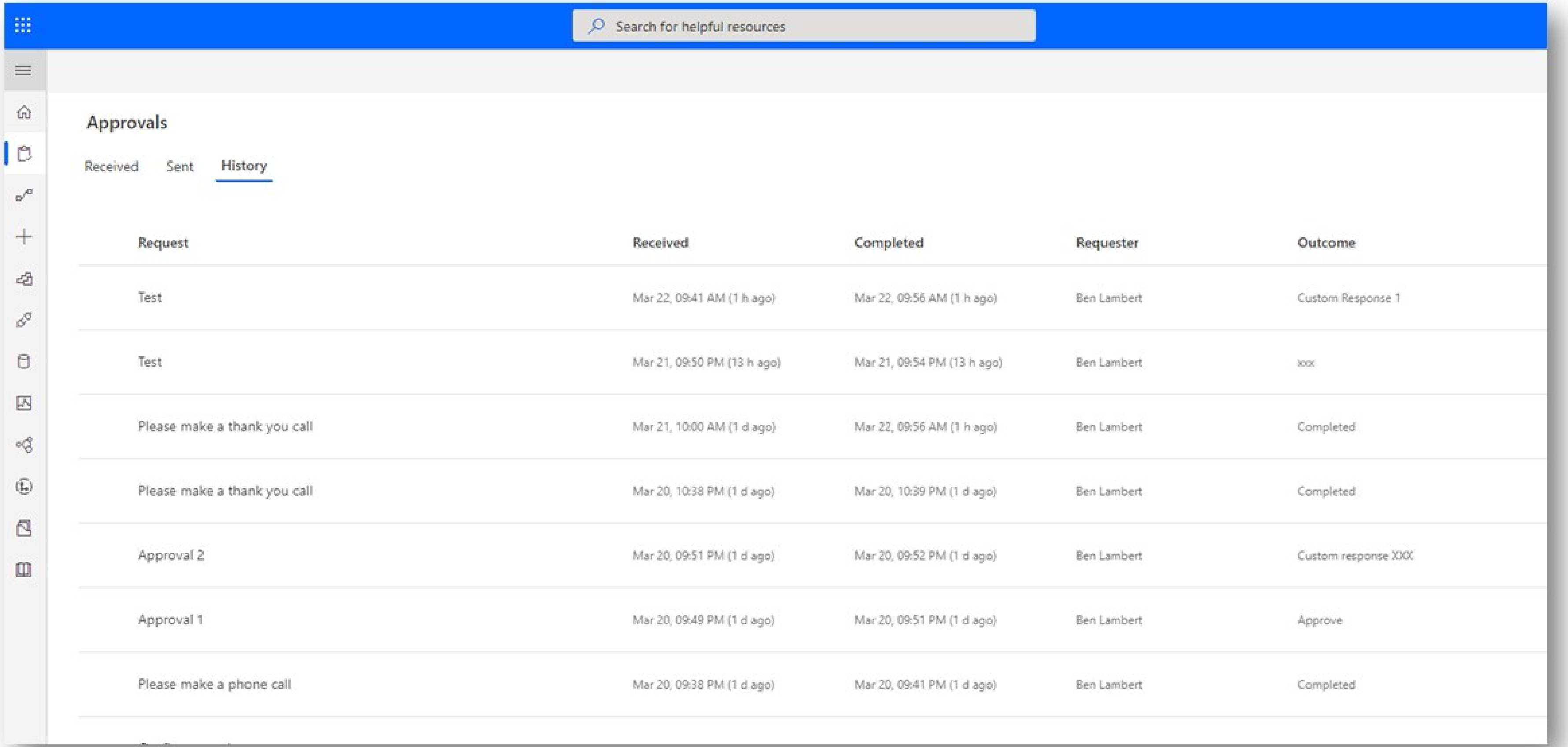


Approval email

- *Power Automate approvals automatically result in an email, with the approval task in the body of the email*
- *The recipient of the task can complete the task right from the email – no need to be a Power Automate user.*
- *The task can be completed with additional comments, which are available to downstream steps in the flow.*

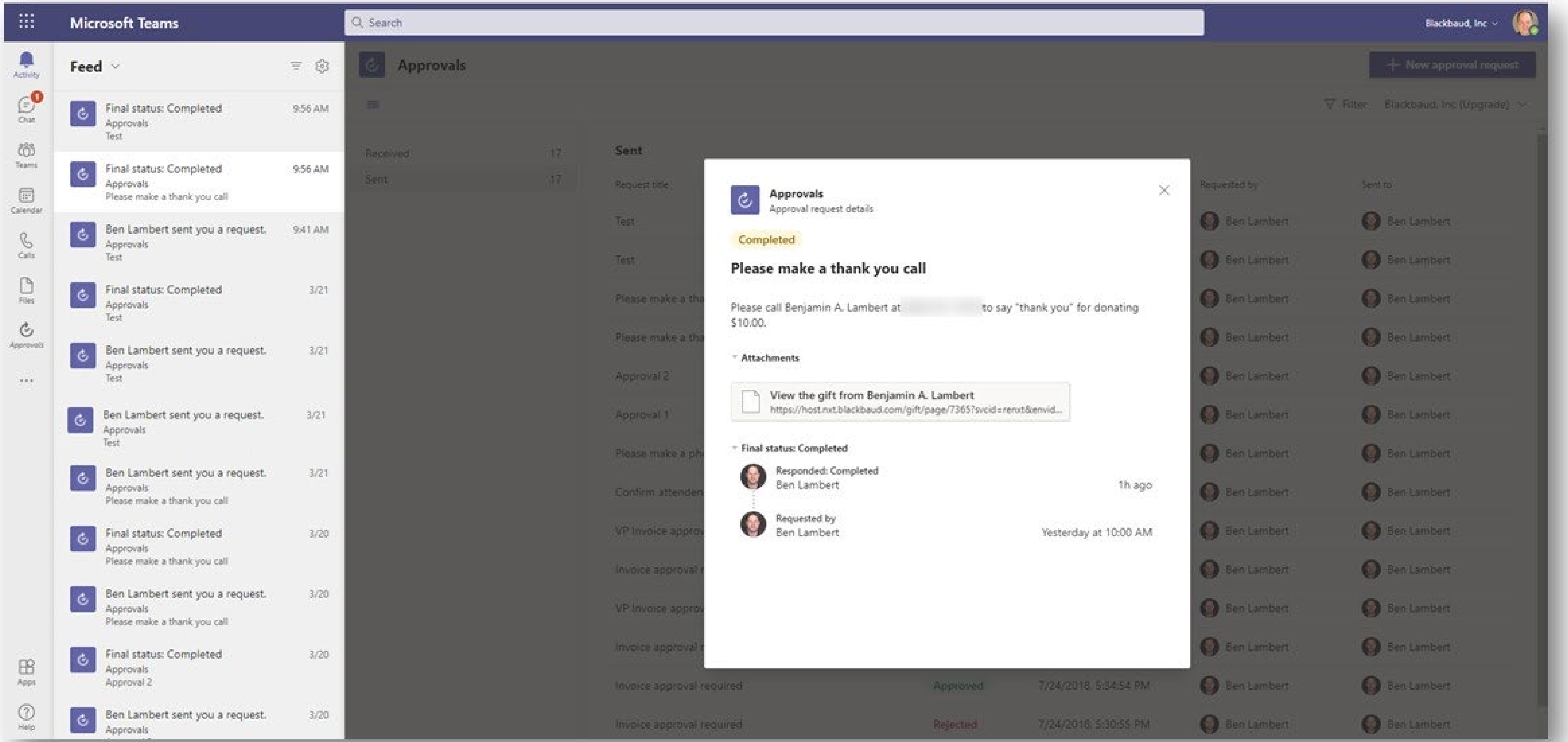


Approvals show up in Power Automate



Request	Received	Completed	Requester	Outcome
Test	Mar 22, 09:41 AM (1 h ago)	Mar 22, 09:56 AM (1 h ago)	Ben Lambert	Custom Response 1
Test	Mar 21, 09:50 PM (13 h ago)	Mar 21, 09:54 PM (13 h ago)	Ben Lambert	xxx
Please make a thank you call	Mar 21, 10:00 AM (1 d ago)	Mar 22, 09:56 AM (1 h ago)	Ben Lambert	Completed
Please make a thank you call	Mar 20, 10:38 PM (1 d ago)	Mar 20, 10:39 PM (1 d ago)	Ben Lambert	Completed
Approval 2	Mar 20, 09:51 PM (1 d ago)	Mar 20, 09:52 PM (1 d ago)	Ben Lambert	Custom response XXX
Approval 1	Mar 20, 09:49 PM (1 d ago)	Mar 20, 09:51 PM (1 d ago)	Ben Lambert	Approve
Please make a phone call	Mar 20, 09:38 PM (1 d ago)	Mar 20, 09:41 PM (1 d ago)	Ben Lambert	Completed

Approvals show up in Microsoft Teams

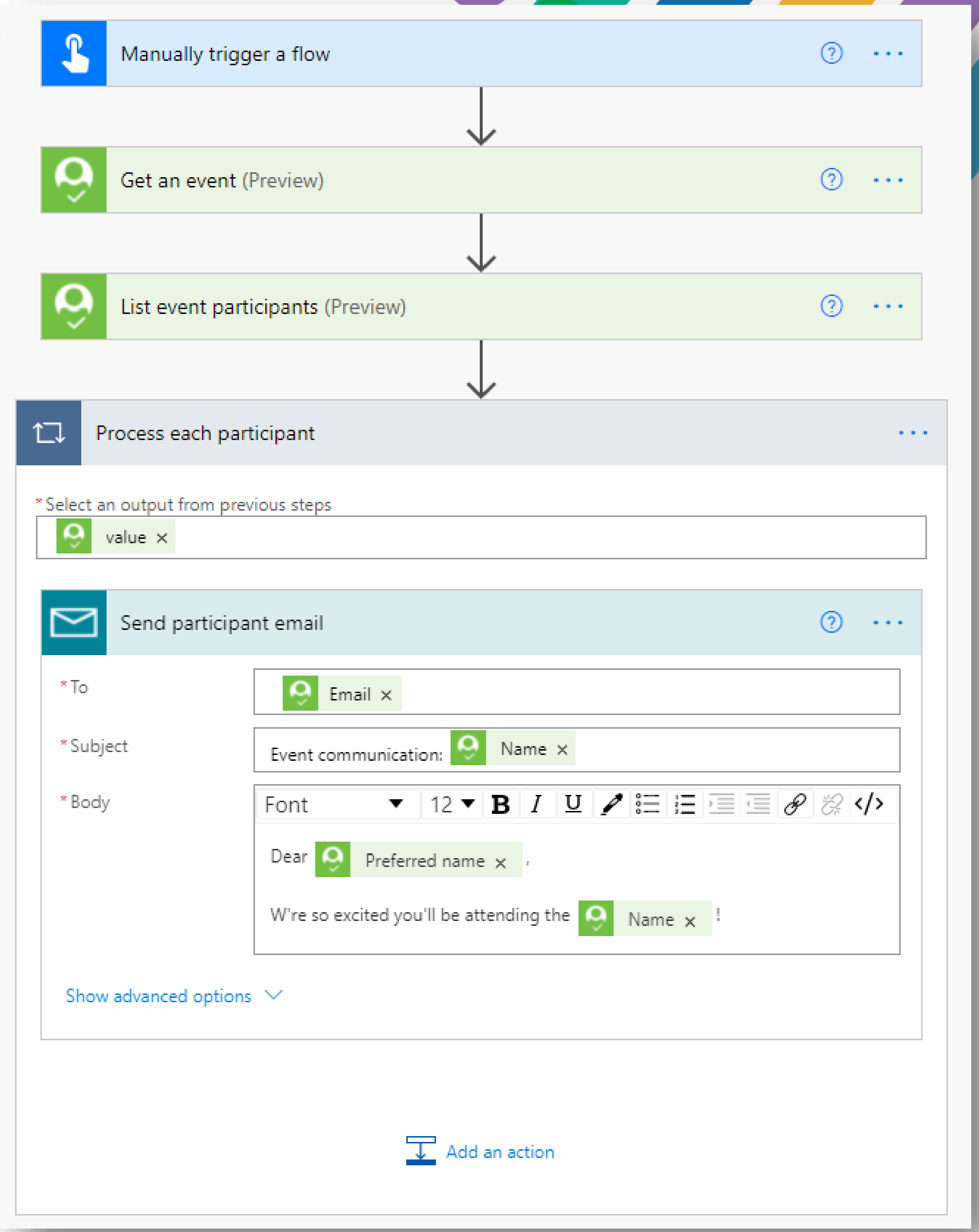


Customer scenario: Event participant emails

"As an Event Coordinator, how can I quickly and easily communicate with participants who are registered for an event?"

Overview

- *Manually triggered*
- *List the event participants (can filter by RSVP status, participation level, etc.)*
- *Send each participant an email with the desired content (can branch content based on other criteria)*
- *Good approach for quick/easy email functionality for smaller numbers of participants*
- *Not suitable for sending thousands of emails (better options exist, like the MailChimp connector)*

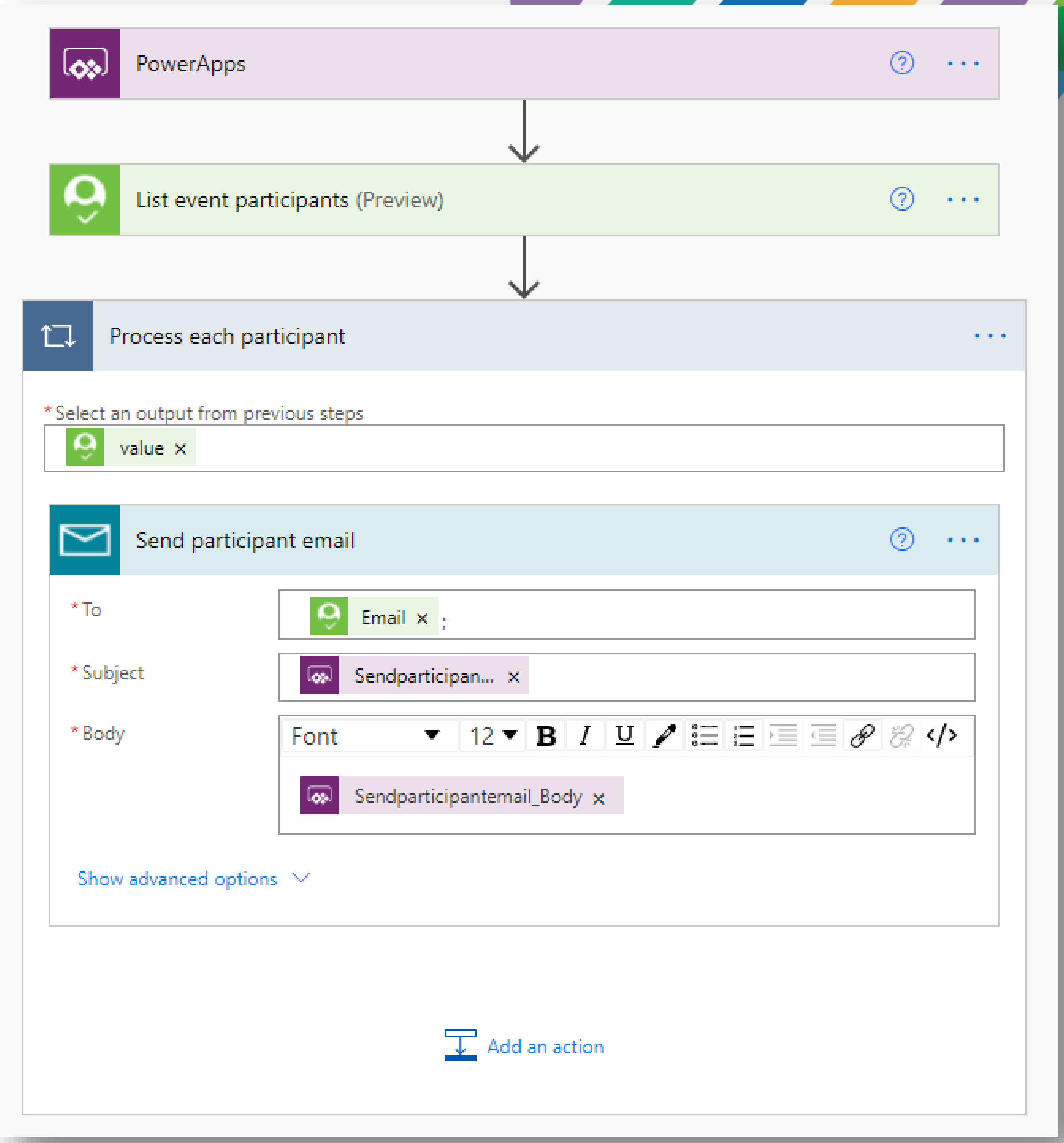


Take it to the next level!

Build a Power App to serve as a front-end user experience that drives a Power Automate flow as the back-end

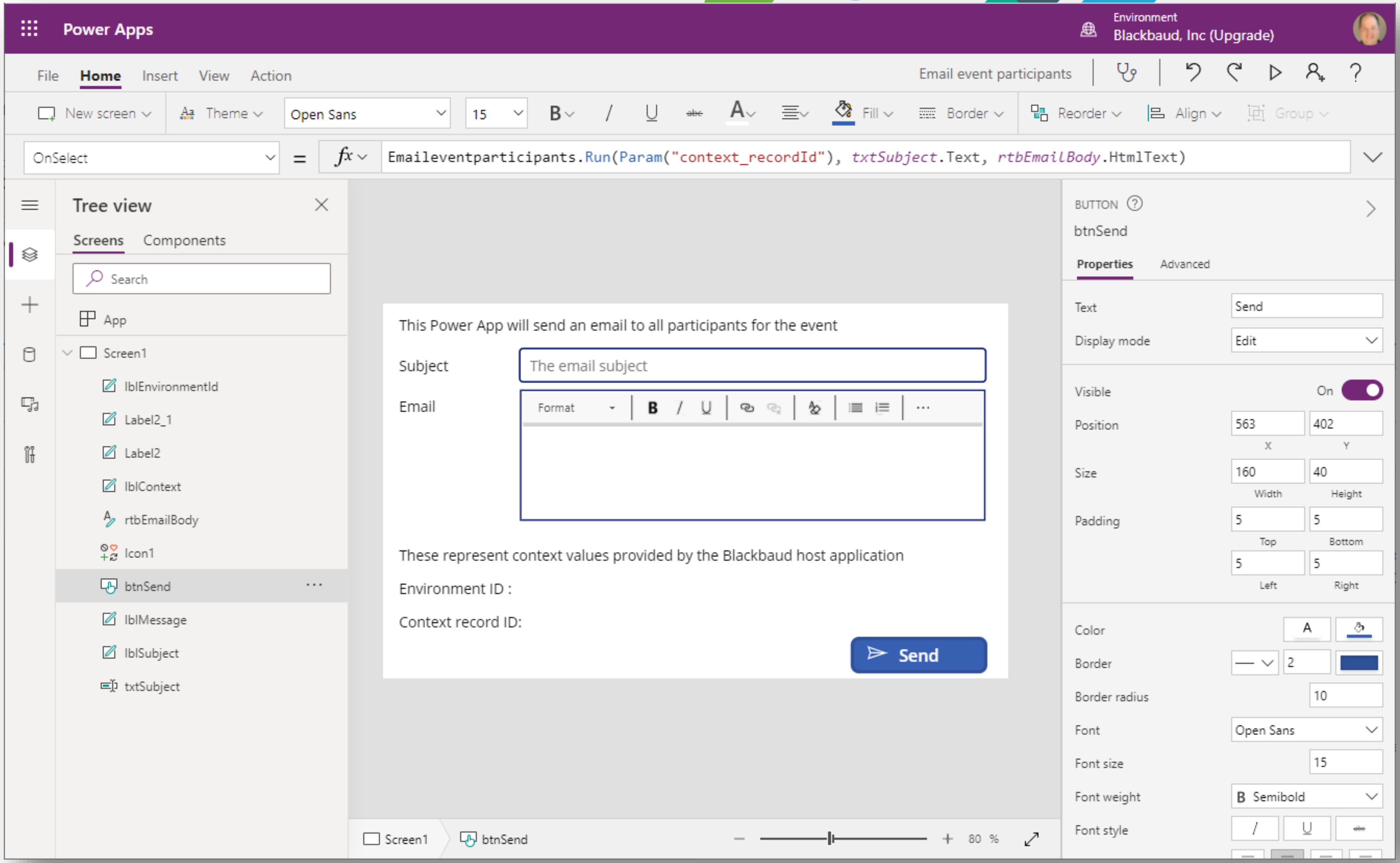
Enhanced flow

- *This flow will be triggered by a Power App*
- *The basic steps are the same, list participants for the event and send each participant an email*
- *The event ID, email subject, and email body are now parameters that will be provided to the flow by the Power App!*



Power Apps designer

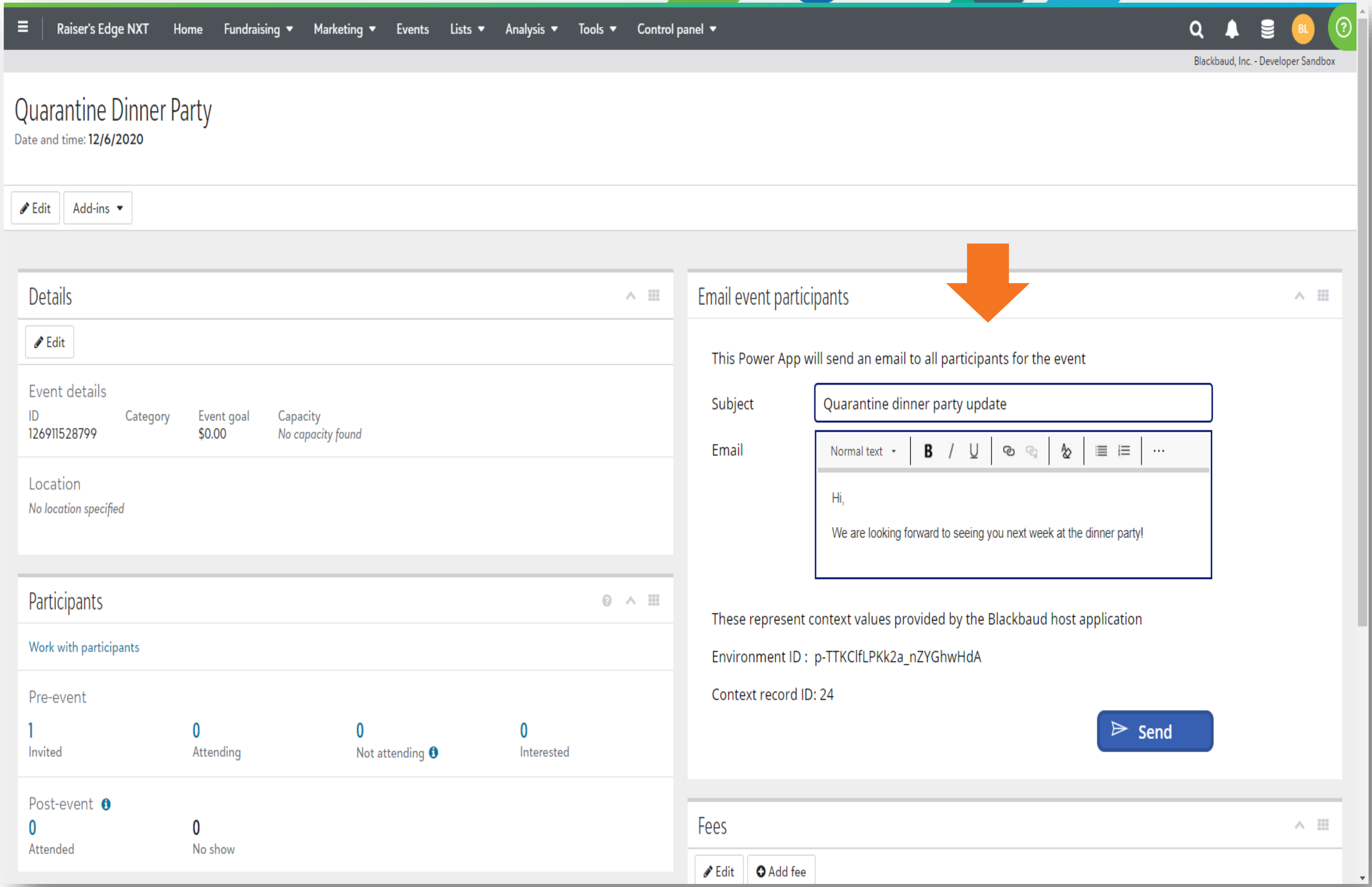
- *Easy to use WYSIWYG drag/drop design-time interface*
- *Clicking the button invokes the flow, providing the event ID, email subject, and email body as parameters*



Power App as a SKY Add-in

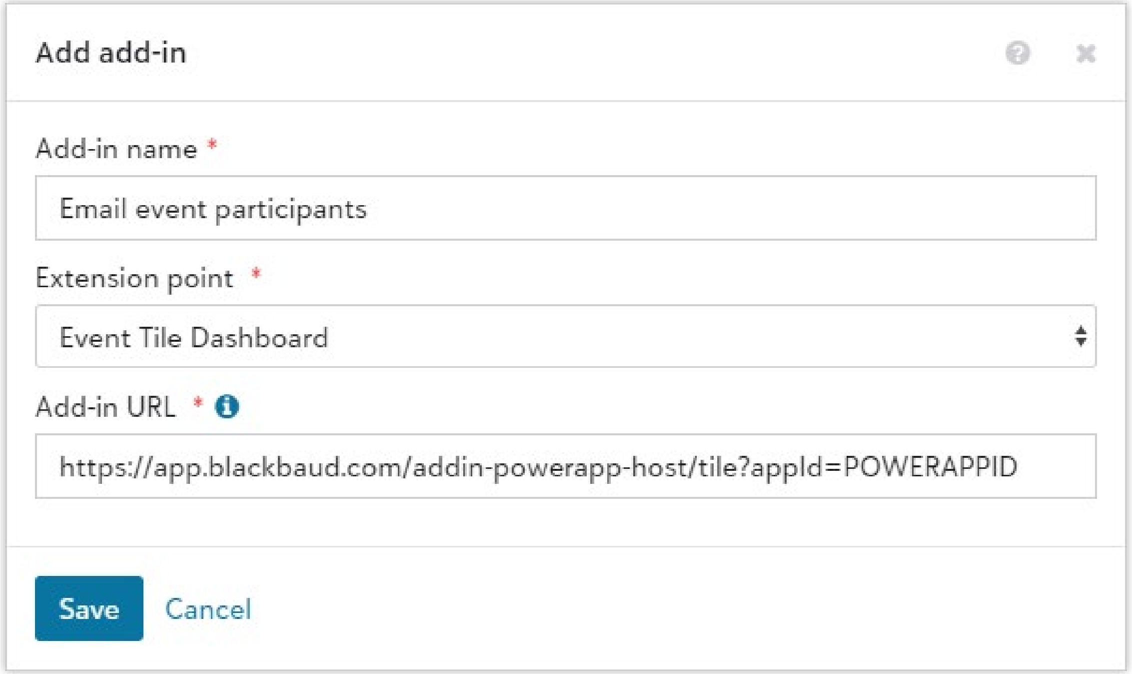
- *Now presented in-product contextually tied to the "current" event record being viewed.*
- *The end-user can provide the email subject/body and click Send, which will invoke the Power Automate flow which will email the event participants!*

All possible without a SINGLE LINE of code!



Power App Host SPA

- Embrace the “Citizen developer” spirit by removing a step that previous required a developer (build and deploy a website to host the Power App)
- A single-page-application (SPA), built and deployed by Blackbaud, that you can configure to host an app built using Power Apps.
- Handles wiring up the “context” from the host application (ex: current record ID = 280) to the app

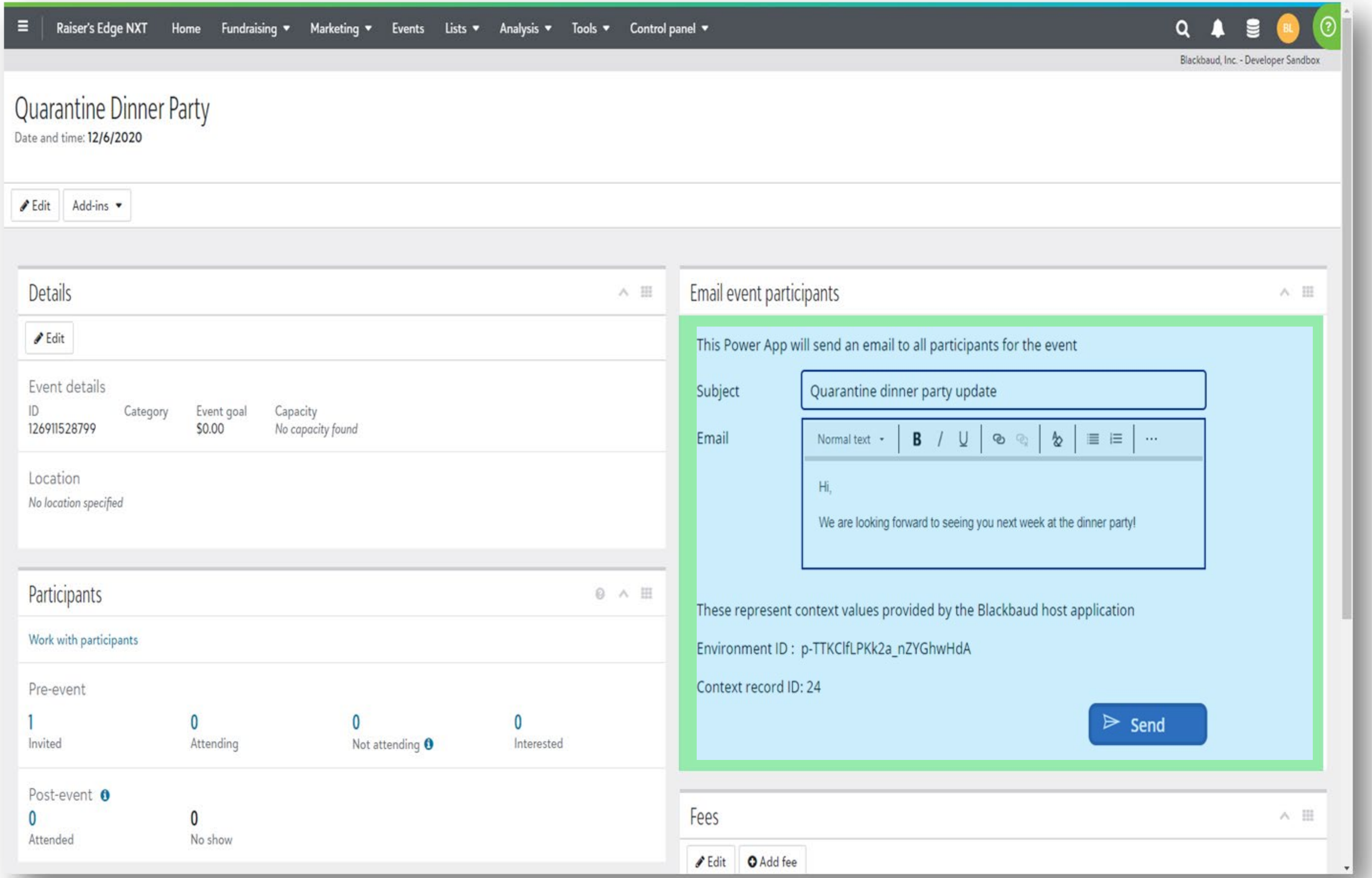


Documentation:

https://docs.blackbaud.com/microsoft-connectors-docs/microsoft-power-platform/power-apps/power-app-addins

Anatomy

- Blackbaud host application
- Power App Host SPA
- Power App

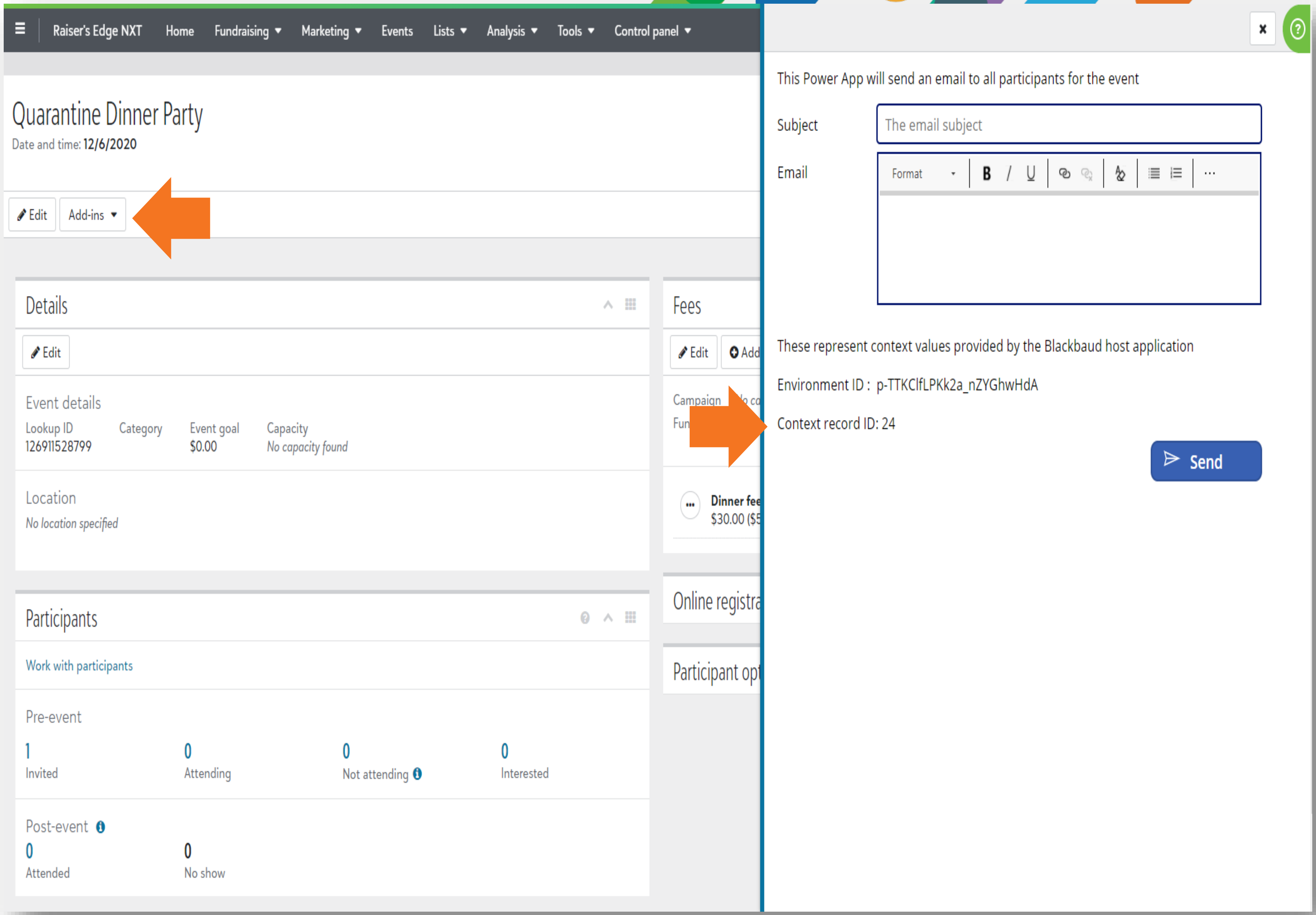


Show a flyout

Use:

`buttonAction=Flyout`

Design vertical content contextually bound to the current record being viewed in the UI.

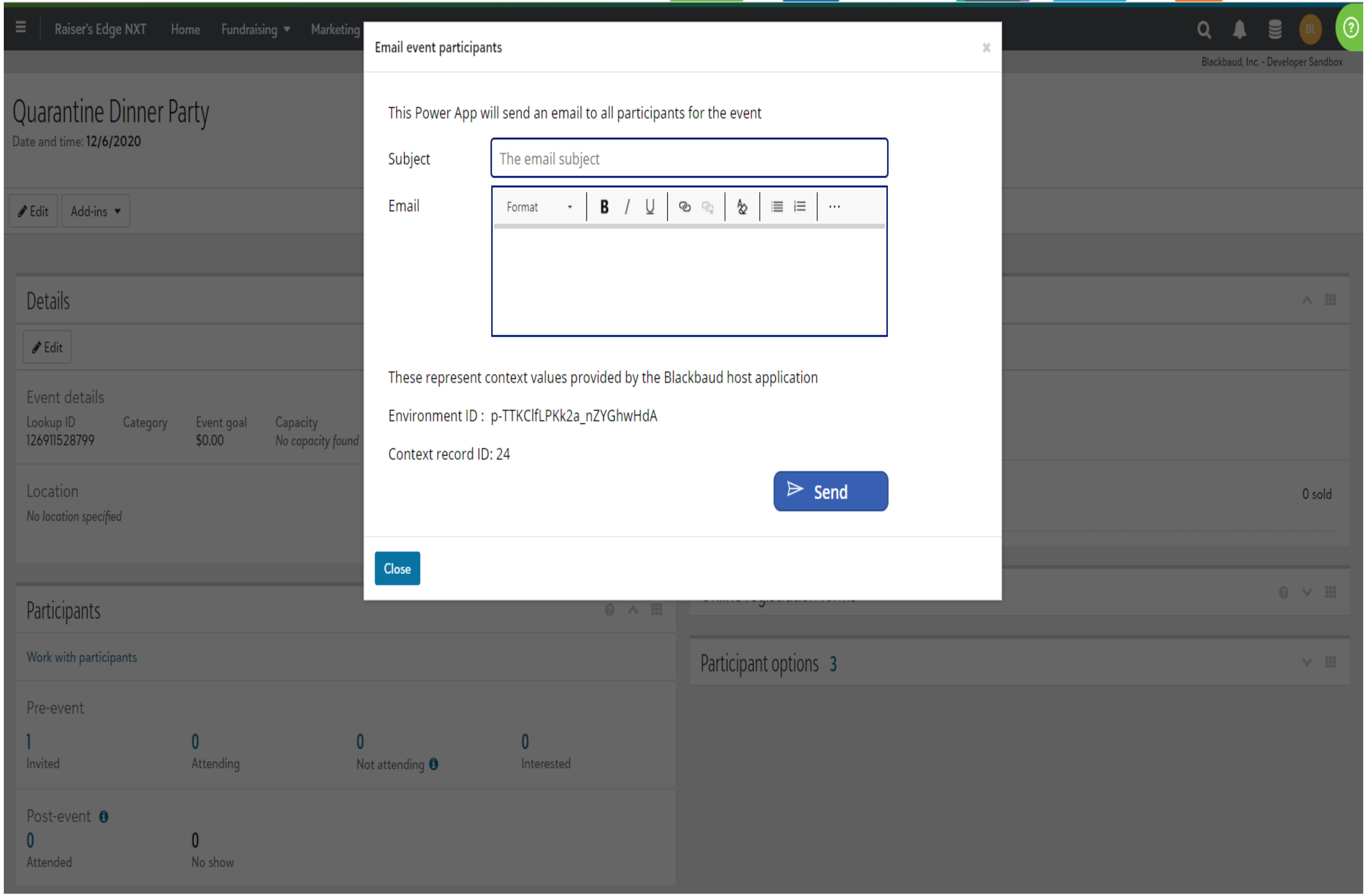


Show a modal

Use:

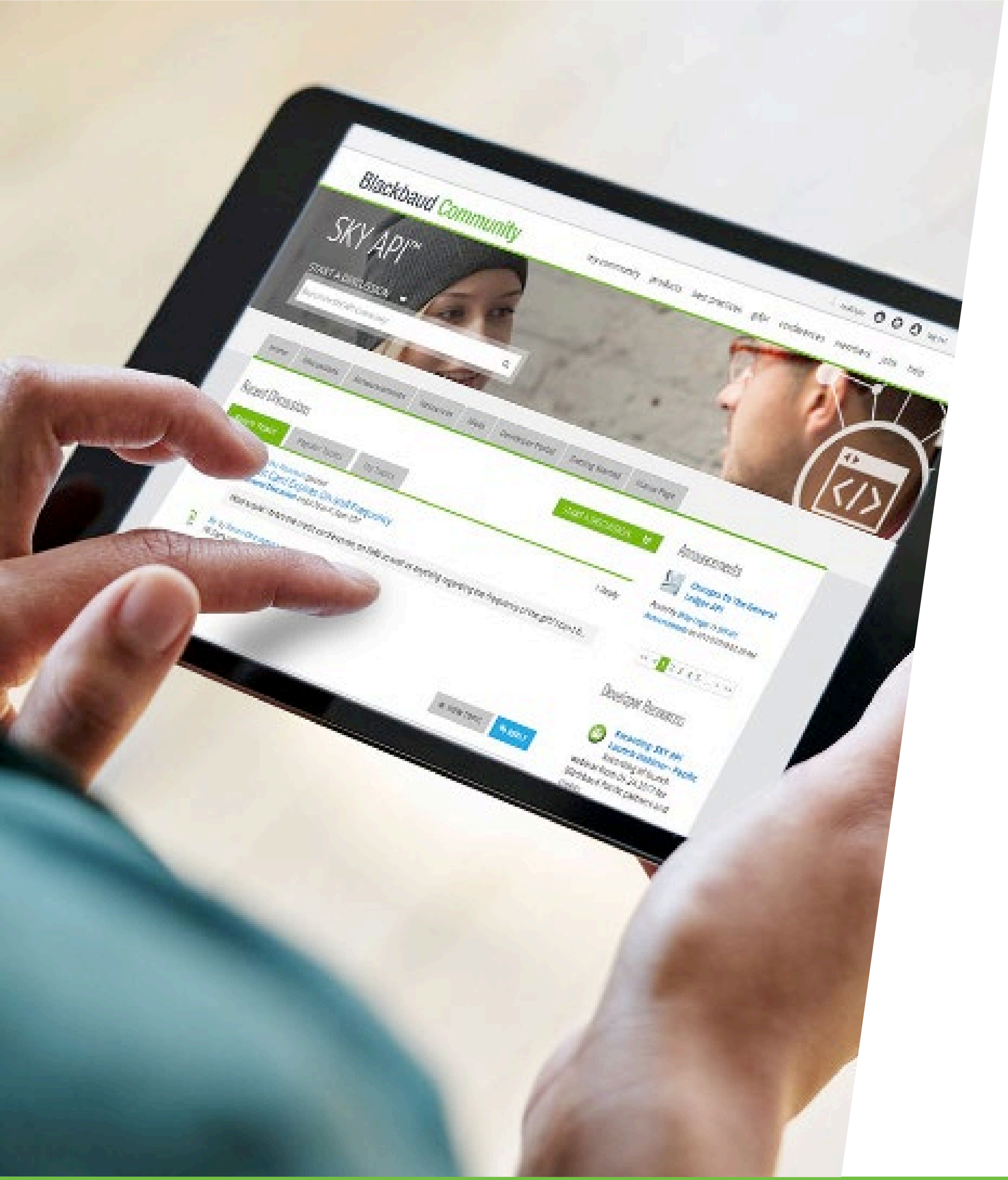
`buttonAction=Modal`

Modal size can be small, medium, large, or even full-page for maximum real estate usage!



Summary

The SKY Developer ecosystem and the tools within the Microsoft Power Platform can help transform your office into a “connected office", allowing you to work more efficiently and spend more time on your mission.



Learn More

Visit the SKY Developer Portal

https://developer.blackbaud.com

Engage with the SKY Developer Community

https://community.blackbaud.com/developer

Learn about the Power Platform connector

https://docs.blackbaud.com/microsoft-connectors-docs

Power App Host SPA docs:

https://docs.blackbaud.com/microsoft-connectors-docs/microsoft-power-platform/power-apps/power-app-addins

#bbdevdays

Thank you!