



blackbaud®
**DEVELOPERS’
CONFERENCE**
June 15–17, 2021

Transformational Fundraising Campaigns – Ideation Workshop

LUMINATE ONLINE®/ TEAMRAISER® TRACK

MARK BECKER

Session Host: Heather McLean



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



Hello! I'm
Mark Becker



HOMETOWN: CHICAGO
CURRENT RESIDENCE: CELEBRATION, FLORIDA
BLACKBAUD PARTNER FOR 13 YEARS

We help nonprofits
use technology to raise funds
and engage supporters
effectively and affordably.

@cathexispartner

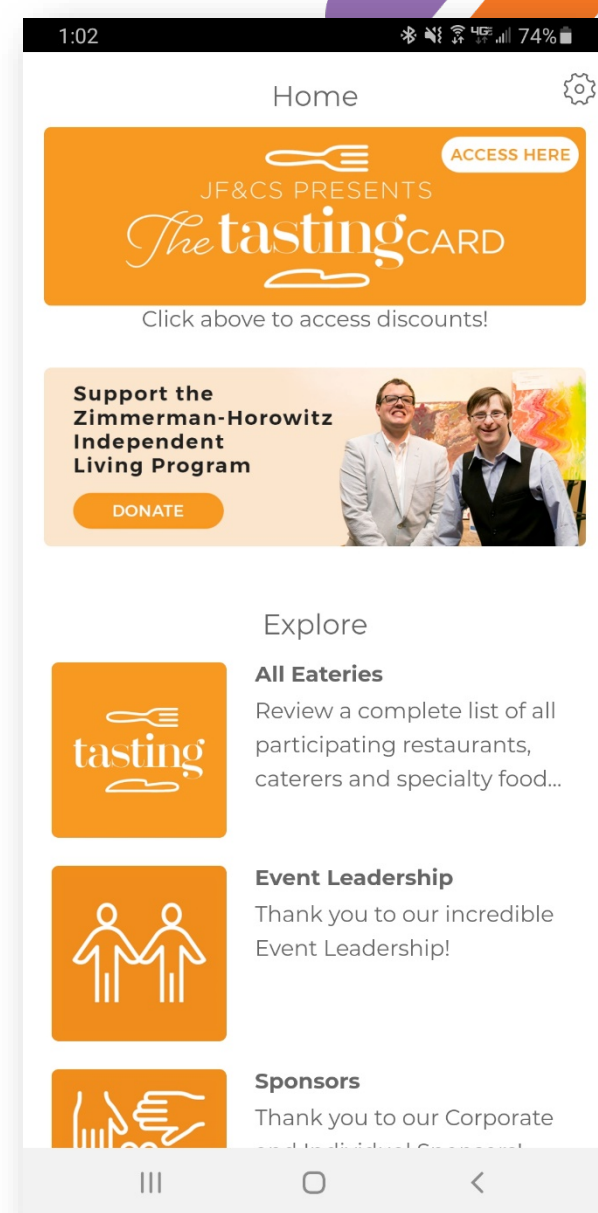




Purchase your virtual card today at thetasting.org!

Enjoy 20% off* at 40 amazing restaurants, caterers and specialty food providers with 48 locations around Metro Atlanta by using The Tasting Card from May 10-24!

All proceeds support the Zimmerman-Horowitz Independent Living Program (Z-H ILP), a highly-individualized, nonsectarian, person-centered supportive living program that enables people with disabilities to live as independently as possible.



<https://buildfire.com/> - App

JF&CS PRESENTS
The Tasting CARD
2021

Information for The Tasting Card

Please note: This is a virtual card to be used via The Tasting Card app.

* First Name * Required Field

* Last Name

* Email

If you are requesting The Tasting Card for others, please click the Add Name button to enter the name and email address for each person below.

 Check this box if you are NOT purchasing a tasting card for yourself.

How did you hear about The Tasting Card

Agency Newsletter Email
 Terri Talks Email
 Other Email
 Facebook
 Instagram
 AJT Ad
 Tasting Card Ambassador

Tasting Card Ambassador (Please provide name below)

Other (please specify)

Price	Ticket Class	Available	Limit	Quantity	Total
\$0.00	The Tasting Card	No Limit	No Limit	<input type="text" value="1"/>	\$0.00
Total Tickets:				1	\$0.00

If you are requesting The Tasting Card for others, please click the Add Name button to enter the name and email address for each person below.

 Check this box if you are NOT purchasing a tasting card for yourself.

* First Name	* Last Name	* Email	
<input type="text" value="First name (required)"/>	<input type="text" value="Last name (required)"/>	<input type="text" value="Email (required)"/>	<input type="button" value="Remove"/>
<input type="text" value="First name (required)"/>	<input type="text" value="Last name (required)"/>	<input type="text" value="Email (required)"/>	<input type="button" value="Remove"/>

```

reus_TastingAppFormCustomization (1).txt - Notepad
File Edit Format View Help
function updateNamesAndQuantity() {
    var textarea_input = "";
    var donorFirstName = $("#first_name").val();
    var donorLastName = $("#last_name").val();
    var donorEmail = $("#primary_email").val();

    if ( document.location.href.indexOf("view=Tickets") > 0 ) {
        var opt_out_self = $("#opt_out_input").is(":checked");
        var quantity = opt_out_self ? 0 : 1;
        var name_list = opt_out_self ? [] : [ donorFirstName + ', ' + donorLastName ];
        var email_list = opt_out_self ? [] : [ donorEmail ];

        $("#name_table tr:has(input)").each(function() {
            var fname = $(this).find('input.first_name');
            var lname = $(this).find('input.last_name');
            var email = $(this).find('input.email');

            if ( fname.val() != "" ) fname.parent().removeClass('error');
            if ( lname.val() != "" ) lname.parent().removeClass('error');
            if ( email.val() != "" ) email.parent().removeClass('error');

            textarea_input += (fname.val() + ' ' + lname.val() + ': ' + email.val() + '\n');
            name_list.push(fname.val() + ', ' + lname.val());
            email_list.push(email.val());

            quantity++;
        });

        if ( $("#name_table tr:has(input)").length == 0 )
            $("#name_table").hide();

        $(textarea).html(textarea_input);
        $("#tix_quantity0").val(quantity).change();

        // update session vars
        var session_endpoint = "https://secure3.convio.net/jfcs/site/SPageNavigator/reus_TastingAppRegisterProcess";
        $.get(session_endpoint, {
            s_primary_email: donorEmail,
            s_purchaser_name: donorFirstName + " " + donorLastName,
            s_name_list: encodeURIComponent(name_list.join(';')),
            s_email_list: encodeURIComponent(email_list.join(';'))
        });
    }
}

```

- ✓ Add additional questions to event registration
- ✓ Appends to hidden text area
- ✓ Form validation
- ✓ Adds names to session variable

```

<style>#app_download, #ios_link, #Android_link, #Desktop_link { display: none; }</style>
<div id="app_download">
<div id="ios_link" align="center">
<a href="https://apps.apple.com/us/app/the-tasting-card/id1561643894" target="_blank">

Install for iOS
</div>
<div id="Android_link" align="center">
<a href="https://play.google.com/store/apps/details?id=com.he942919267f.www&pcampaignid=pcampaignidMKT-Other-global-all-co-prtnr-py-PartBadge-Mar2515-1">

Install for Android
</div>
<div id="Desktop_link" align="center">
<table border="0" cellspacing="10" align="center">
<tr>
<td align="center">
<a href="https://play.google.com/store/apps/details?id=com.he942919267f.www&pcampaignid=pcampaignidMKT-Other-global-all-co-prtnr-py-PartBadge-Mar2515-1">
<br />
Install for Android</a>
</td>
<td width="25">&nbsp;</td>
<td align="center">
<a href="https://apps.apple.com/us/app/the-tasting-card/id1561643894" target="_blank">
<br />
Install for iOS</a>
</td>
</tr>
</table>
</div>
</div>
<script src="https://code.jquery.com/jquery-3.6.0.min.js"></script>
<script>
var endpoint = "https://hooks.zapier.com/hooks/catch/9713841/ojiuag8/";
var name_list = "[[S80:name_list]]";
var email_list = "[[S80:email_list]]";
var name_rows = [], email_rows = [];

var index = 0;
jQuery.noConflict();
jQuery(document).ready(function($j) {

if ( name_list != "" && name_list.indexOf("undefined") == -1 ) {
name_rows = decodeURIComponent(name_list).split(";");
email_rows = decodeURIComponent(email_list).split(";");

for ( var i in name_rows ) {
var name_data = name_rows[i];
var email = email_rows[i].trim();
var name_fields = name_data.split(",");
var fname = name_fields[0];
var lname = name_fields[1];

if ( fname != "" && lname != "" && email != "" ) {
$jj.post(endpoint, {
firstname: fname,
lastname: lname,
email: email
}, function(result) {
if ( ++index == email_rows.length ) {
var url = "https://secure3.convio.net/jfcs/site/SPageNavigator/AddTastingCardsIfRecipients.html? " +
"name_list=[[S80:name_list]]&" +
"email_list=[[S80:email_list]]&" +
"primary_email=[[S80:primary_email]]&" +
"purchaser_name=[[S80:purchaser_name]]&" +
"index=0";
$jj("body").append("<iframe style='display: none;' src='"+url+"' />");
}
});
}
});

var device = getMobileOperatingSystem();
$jj("#" + device + "_link, #app_download").show();

});

function getMobileOperatingSystem() {
var userAgent = navigator.userAgent || navigator.vendor || window.opera;

if (userAgent.match( /iPad/i ) || userAgent.match( /iPhone/i ) || userAgent.match( /iPod/i ) )
{
return 'iOS';
}
else if( userAgent.match( /Android/i ) )
{
return 'Android';
}
else
{
return 'Desktop';
}
}
}
</script>

```

JF&CS ALABAMA EATERIES LEADERSHIP SPONSORS BECOME A SPONSOR ABOUT Z-H ILP DONATE

Thank you for your purchase!

An email notification with login instructions and a link to download the app will be sent to mark@cathexispartners.com

Ticket Class	Price	Quantity	Amount	Tax Deductible Portion
The Tasting Card		2	\$0.00	\$0.00
Totals		2	\$0.00	\$0.00

Additional Responses

If you are requesting The Tasting Card for others, please click the Add Name button to enter the name and email address for each person below:

Mark Becker: mark@cathexispartners.com

How did you hear about The Tasting Card:

User Provided No Response

Tasting Card Ambassador (Please provide name below):

User Provided No Response

Other (please specify):

User Provided No Response

Note regarding the Tax Deductible Portion:

This is your receipt for tax purposes.

This organization's tax ID is 58-1479212.

Return to event details

View other events

- ✓ Reads names from session variables
- ✓ Post to Zapier webhook url
- ✓ Detects device and shows app store link
- ✓ Submit additional names to Survey via hidden iframe which sends AR with link to app

```
<script src="https://code.jquery.com/jquery-3.6.0.min.js"></script>
```

```
<script>
```

```
var endpoint = "https://secure3.convio.net/jfcs/site/CRSurveyAPI";
```

```
var name_rows = [], email_rows = [];
var name_list = "[[S334:name_list]]";
var email_list = "[[S334:email_list]]";
var primary_email = "[[S334:primary_email]]";
var purchaser_name = "[[S334:purchaser_name]]";
var auth = "[[S86:true]]";
var i = parseInt("[[S334:index]]");
```

```
jQuery.noConflict();
jQuery(document).ready(function($j) {
```

```
  if ( name_list != "" && name_list.indexOf("undefined") == -1 ) {
    name_rows = decodeURIComponent(name_list).split(";");
    email_rows = decodeURIComponent(email_list).split(";");
    console.log(email_rows);
    var name_data = name_rows[i];
    var name_fields = name_data.split(",");
```

```
    var fname = name_fields[0];
    var lname = name_fields[1];
    var email = email_rows[i].trim();
```

```
    if ( email != primary_email && fname != "" && lname != "" && email != "" ) {
```


```
      $j.post( endpoint, {
        api_key: "wDB09SQODRpVIOvX",
        v: "1.0",
        auth: auth,
        method: "submitsurvey",
        survey_id: "2021",
        cons_first_name: fname,
        cons_last_name: lname,
        cons_email: email,
        source: "Tasting Card Gift Recipient",
        question_1763: purchaser_name
      }, function(response) {
        console.log(response);
        $j.get("https://secure3.convio.net/jfcs/site/CRConsAPI", {
          api_key: "wDB09SQODRpVIOvX",
          v: "1.0",
          method: "logout"
        }, function(response) {
          if ( i + 1 < email_rows.length ) {
            var url = "https://secure3.convio.net/jfcs/site/SPageNavigator/AddTastingCardGiftRecipients.html?" +
              "name_list=" + encodeURIComponent(name_list) +
              "&email_list=" + encodeURIComponent(email_list) +
              "&primary_email=" + encodeURIComponent(primary_email) +
              "&purchaser_name=" + encodeURIComponent(purchaser_name) +
              "&index=" + (i+1);
            console.log("nexturl", url);
            location.href = url;
          }
        });
      });
    }
  });
}
```

```
});
```

```
</script>
```


- ✓ Grabs Nth name/email in the list
- ✓ Posts data to the Survey API
- ✓ Logs out
- ✓ Refreshes itself in order to process the next name

* used this approach vs Survey API posts directly since Zapier callouts originate from a new IP address every time so whitelisting would have been difficult

<  TastingApp User Registration

Trigger
1. Catch Hook

Choose app & event ✓

 Webhooks by Zapier **PREMIUM** Change

Trigger Event (required)
Catch Hook INSTANT

This is what starts the Zap.

Continue


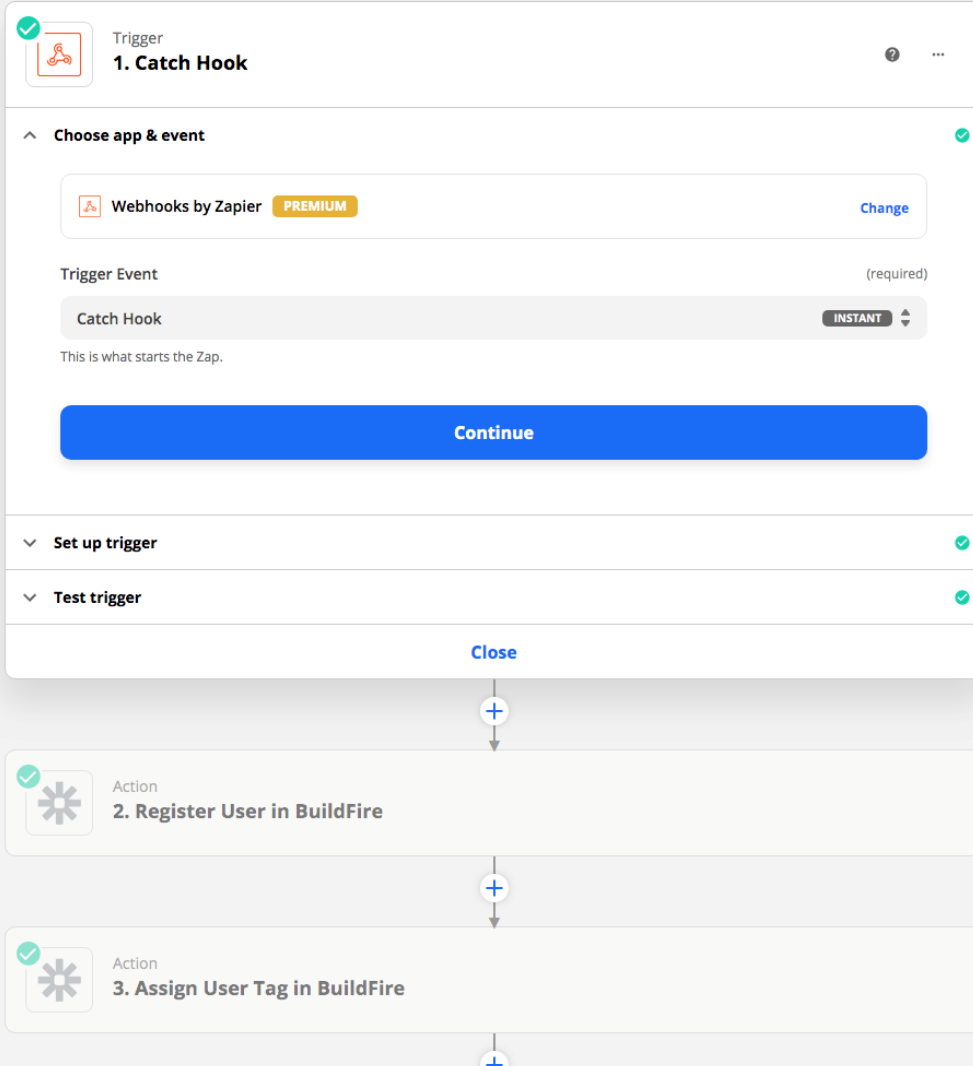
Set up trigger ✓

Test trigger ✓


Close

Action
2. Register User in BuildFire

Action
3. Assign User Tag in BuildFire



Uses Zapier to catch
the webhook from the ticket
purchase thank you page


✓  Action
2. Register User in BuildFire ? ...

▼ Choose app & event ✓

▼ Choose account ✓

▲ Set up action ✓

Email (required)

 1. Email: test1@nowhere.com

This is the user email.

Password

Tasting2021!


This represent the user password ,in case to leave it empty it will be auto generated. Password must be at least 8 characters long, contains an upper case letter, a lower case letter, a number and a symbol.

Display Name

My Nickname


Display Name for the user can be changed from the user profile. If you leave it empty it will be like the email.

First Name


 1. Firstname: Guest 1

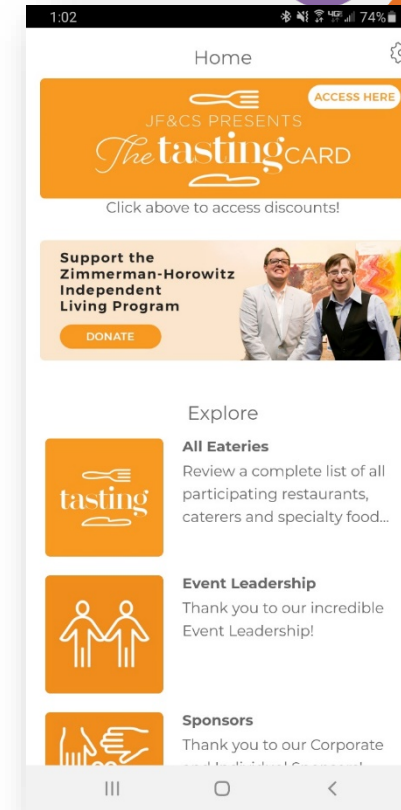
First Name for the the user. If you leave it empty the first name will be like the email.

Last Name

 1. Lastname: Test

Last Name for the user.

 Refresh fields



Creates / updates user in
the BuildFire app

The screenshot shows a configuration window for an action in BuildFire. At the top, there is a gear icon and the text "Action" followed by "3. Assign User Tag in BuildFire". Below this are three expandable sections: "Choose app & event", "Choose account", and "Set up action". The "Set up action" section is currently expanded and contains two required fields: "Tags" and "Email". The "Tags" field has a value of "tasting2021" and a "Multiple tags value." label below it. The "Email" field has a value of "2. Email: erland.sanborn+...xispartners.com" and a "Refresh fields" button below it. At the bottom of the window, there is a "Test action" section and a "Close" button.

✓ Action ? ...

3. Assign User Tag in BuildFire

▼ Choose app & event ✓

▼ Choose account ✓

^ Set up action ✓

Tags (required)

tasting2021 X

Enter text or insert data...

Multiple tags value.

Email (required)

* 2. Email: erland.sanborn+...xispartners.com

Email.

Refresh fields

▼ Test action ✓

Close



Tag / flag user account as authorized to receive discounts

JF&CS PRESENTS
The tasting CARD
2021

**Thank You Donors & Restaurants!
The Tasting was a HUGE Success!**

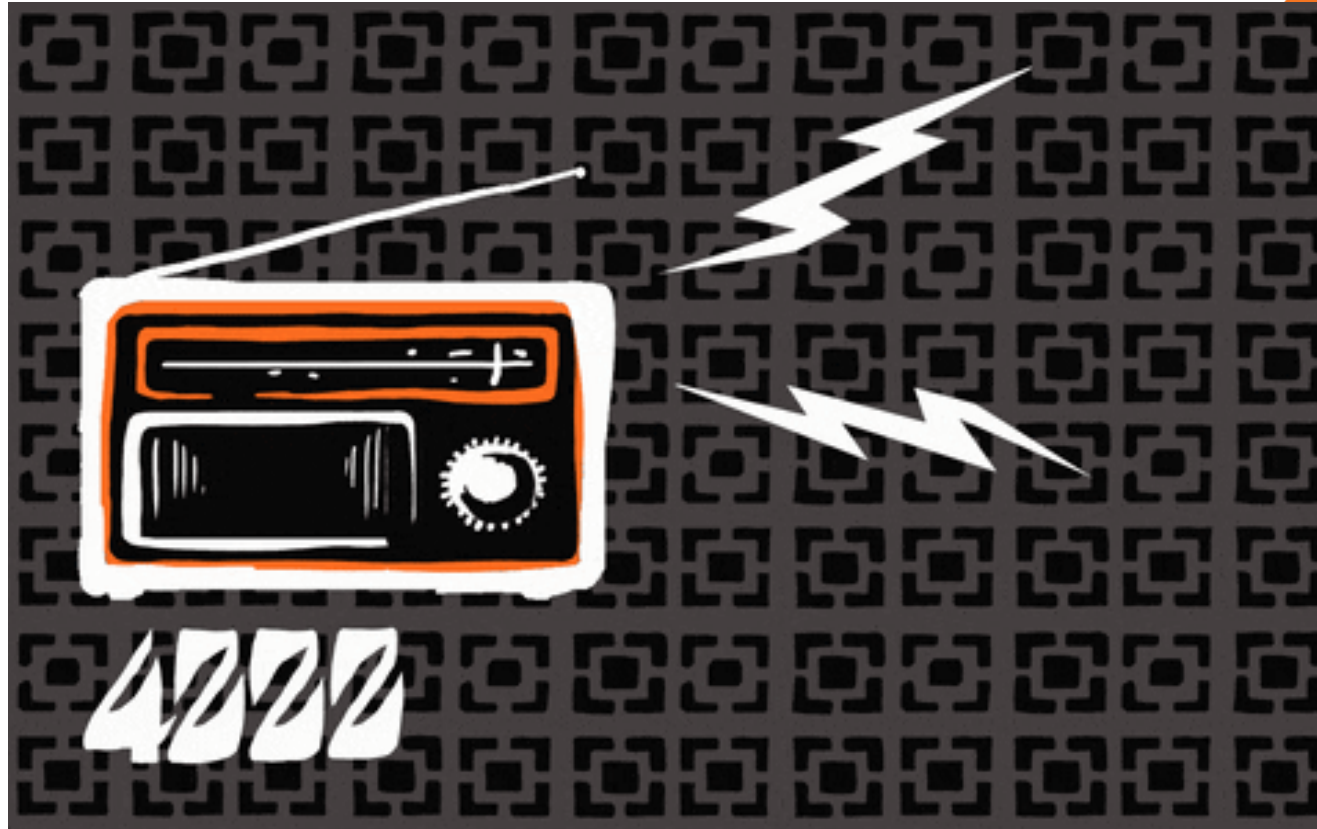


The clients of the nonsectarian Zimmerman-Horowitz Independent Living Program want to give a big THANK YOU to all who supported this year's **Tasting Card!**

< 15 hours
developer time

Radiothon

- Wanted true real time donation reporting



```
<form id="gform" method="POST" class="pure-form pure-form-stacked" action="https://script.google.com/macros/s/AKfycbwevGxetm2ApNv5x20WUiNaMGAIeKaiajfbHoSDb34eYCDg-bm/exec" style="display: none;"
  <!-- change the form action to your script url -->

<fieldset class="pure-group">
  <label type="text" for="donor_first">Donor First Name: </label>
  <input id="name" name="donor_first" placeholder="donor_first" value="[[S120:dc:donorFirstName]]" />
</fieldset>

<fieldset class="pure-group">
  <label for="donor_last">Donor Last Name: </label>
  <input type="text" id="message" name="donor_last"
    placeholder="donor_last" value="[[S120:dc:donorLastName]]" />
</fieldset>

<fieldset class="pure-group">
  <label for="joint_first">Joint First Name: </label>
  <input type="text" id="message" name="joint_first"
    placeholder="joint_first" value="[[S120:dc:jointDonorFirstName]]" />
</fieldset>

<fieldset class="pure-group">
  <label for="joint_last">Joint Last Name: </label>
  <input type="text" id="message" name="joint_last"
    placeholder="joint_last" value="[[S120:dc:jointDonorLastName]]" />
</fieldset>

<fieldset class="pure-group">
  <label for="city">City: </label>
  <input type="text" id="message" name="city"
    placeholder="city" value="[[S120:dc:donorCity]]" />
</fieldset>

[[?xtruexTRUExyesxYESxYesx::x[[S120:dc:custom:custom_boolean1]]x::
  <fieldset class="pure-group">
    <label for="read_on_air">Read On-Air: </label>
    <input type="text" id="message" name="read_on_air"
      placeholder="read_on_air" value="YES" />
  </fieldset>

::
  <fieldset class="pure-group">
    <label for="read_on_air">Read On-Air: </label>
    <input type="text" id="message" name="read_on_air"
      placeholder="read_on_air" value="NO" />
  </fieldset>

]]
```

Once a donation is made and the Thank You page is reached, information about the donation is processed and sent to a custom Google Sheet.

A custom macro in Google Sheets then adds this to a transaction log in Google Sheets and the dashboard is updated in real-time.

We're capturing:

- Donor's First/Last name
- Joint donor's First/Last name if applicable
- Whether or not the donor wanted their name to be read on the air

Code also captures one time vs sustaining.

If a sustaining gift, that dollar amount is multiplied by 12 to determine the anticipated annual amount and that is passed along to the Google Sheet instead of the regular donation amount.

*We, of course, don't recommend sending sensitive donor data. Just what is needed to make the dashboard useful.

	A	B	C	D	E	F
1	Timestamp	donor_first	donor_last	joint_first	joint_last	city
2	9/25/18 6:29:48AM	Cornelia				
3	9/25/18 6:30:29AM	april				
4	9/25/18 6:50:04AM	Scott				
5	9/25/18 6:50:19AM	Roger		Gorgia		
6	9/25/18 6:57:23AM	kelly				
7	9/25/18 6:57:43AM	Russell				
8	9/25/18 7:12:19AM	Paul				
9	9/25/18 7:14:20AM	Rosalie				
10	9/25/18 7:28:30AM	Ana		Kevin		
11	9/25/18 7:34:58AM	Austin		Bobbi		
12	9/25/18 7:36:30AM	Lindsay		Joe		
13	9/25/18 7:39:32AM	Julie		Michael		
14	9/25/18 7:49:45AM	Nicole				
15	9/25/18 8:05:57AM	Dixie				
16	9/25/18 8:10:09AM	Howard		Sydney and Ellie		
17	9/25/18 8:12:36AM	Patty		Thomas		
18	9/25/18 8:16:13AM	Jan				



	A	B	C	D	E	F	G
4	Month (1-12):	9					
5	Day (Date):	28			DO NOT CHANGE/EDIT/DELETE THESE		
6							
7		Goal	From Phones		Online Total	Needed for Goal	
8	6-7 am	\$5,000	\$850		\$1,968	-\$2,182	
9	7-8 am	\$7,000			\$4,399	-\$2,601	
10	8-9 am	\$1,000			\$2,648	\$1,648	
11							
12	5-6 pm				\$11,301	\$11,301	
13	6-7 pm				\$5,596	\$5,596	
14							
15							
16	This Hour:	2 AM					
17		Goal	From Phones		Online Total	Needed for Goal	
18		\$2,000			\$0	-\$2,000	
19							
20	Custom Hour						
21							
22	Start Hour:	9	Note: Enter hours in 24 hour format, so 2pm would be 14				
23							
24		Goal	From Phones		Online Total	Needed for Goal	
25					\$2,712	\$2,712	
26							
27	Custom Hour 2						
28							
29	Start Hour:	10	Note: Enter hours in 24 hour format, so 2pm would be 14				
30							
31		Goal	From Phones		Online Total	Needed for Goal	

< 8 hours
developer time

Donation form / shopping
cart abandonment
follow up via
Microsoft Power Automate



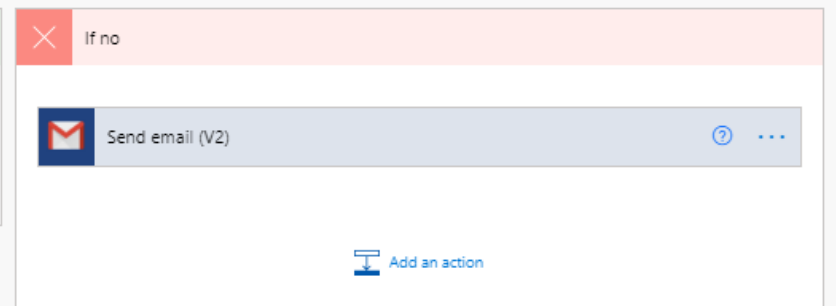
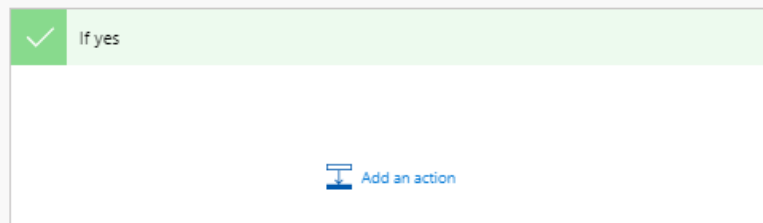
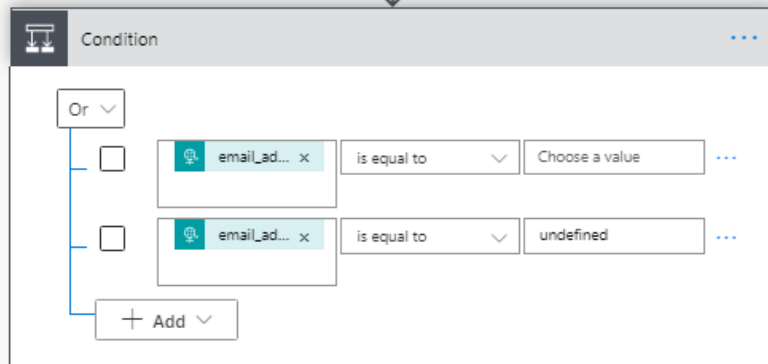
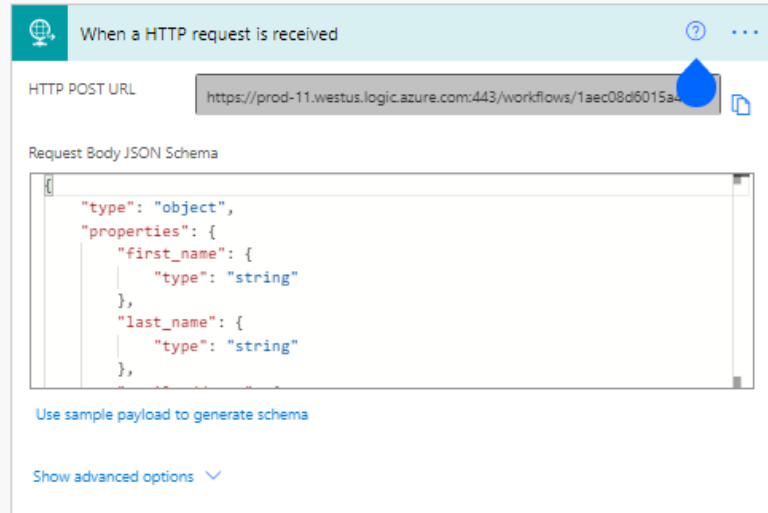
1. Captures:

- ✓ First name
- ✓ Last name
- ✓ Email address

2. Passes to Power Automate

3. Power Automate connected to Gmail, sends an email to asking them to complete the donation

< 8 hours
developer time





#bbdevdays

Thank you!