



A STEP-BY-STEP GUIDE ON AUTOMATING YOUR GIVING VIA ZAPIER

Here at B1G1, we're always looking for ways to help business owners embed giving into the heart of their businesses more effectively – and today, we are excited to share with you a powerful new way of doing so: via Zapier.

[Zapier](#) is an online automation tool that allows you to create code-free, automated workflows (called *Zaps*) that connect apps you use every day.

If you are an existing Zapier user, you can already link 3,000+ apps – including MailChimp, Xero, Quickbooks, InfusionSoft, Autotask, PipeDrive and more – to B1G1's Giving Stories.

Once you've set up the Zaps, whenever your specified activity occurs on your business apps, your Giving Stories will be automatically added to the Giving Cart.

This means that you no longer need to manually count the number of products sold, clients created, or projects completed each period when you do your giving. You can simply log in to your B1G1 account whenever you want to do your giving, head directly to your Giving Cart, and check out all the giving that has already been added while you were doing what you normally do.

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In this guide, we share with you some ideas and examples of how you can use Zapier to automate your giving. This guide consists of 3 sections:

Section 1: Accessing the B1G1 Integration on Zapier

Section 2: Creating Zaps with B1G1

Section 3: Frequently Asked Questions

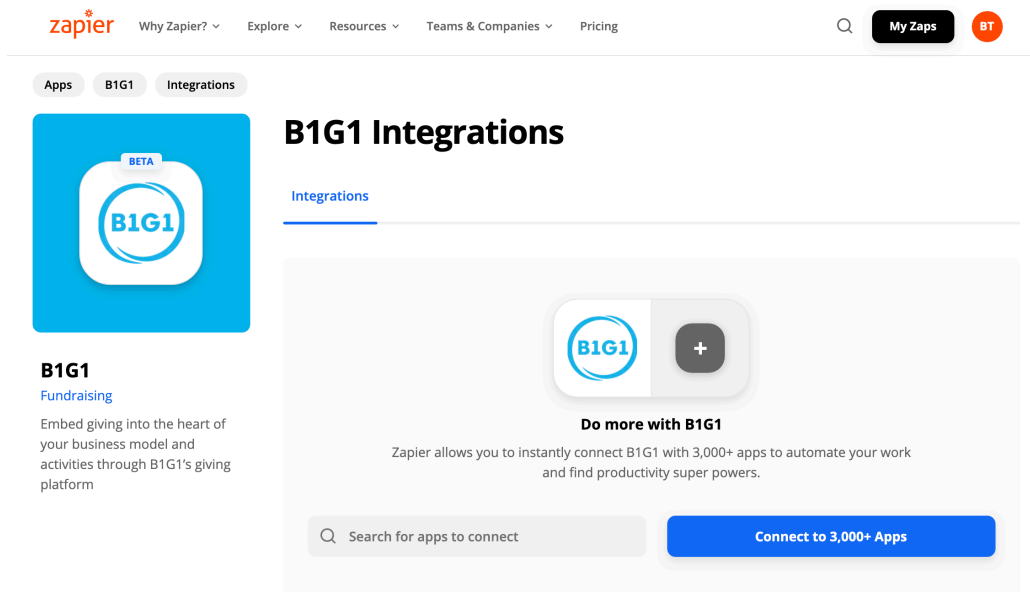
If you are new to Zapier, you can also refer to the **Appendix** for an overview of the tool and how to get started.

Prefer a video tutorial? [Watch it here.](#)

Section 1: Accessing the Beta B1G1 Integration on Zapier

To start creating Zaps with B1G1, first create your Zapier account, log in, and then head to this link: <https://zapier.com/apps/b1g1/integrations>

Step 1: Click on the “Connect to 3,000+ Apps” button.



Step 2: That's it! You will be directed to the “Create your Zap” page. Follow the steps on screen to get started with creating your Zaps.

Section 2: Creating Zaps with B1G1

The most popular Giving Stories are often linked to key touchpoints within a business' customer journey, such as when a website visitor fills out a form or when a customer makes a purchase.

With Zapier, you can now integrate your Giving Stories directly with your favourite business tools.

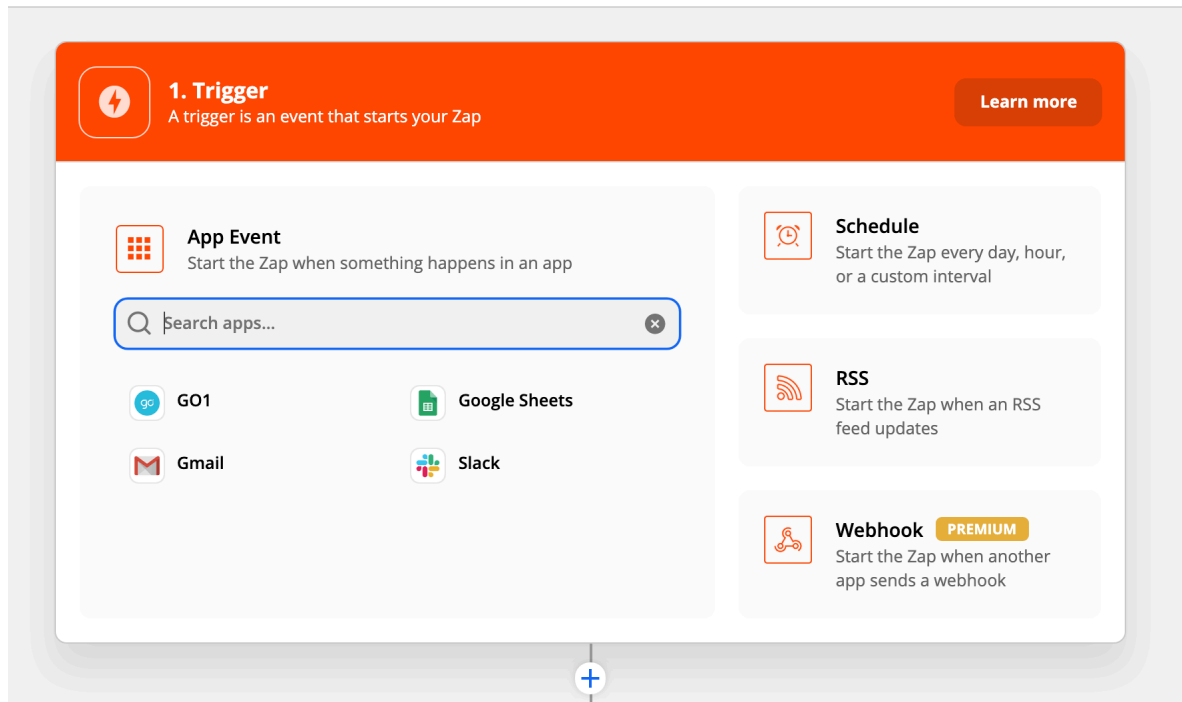
Here's a walkthrough of how to create Zaps with the some of the most common business apps that B1G1 members use:

Example 1: Integration with Xero

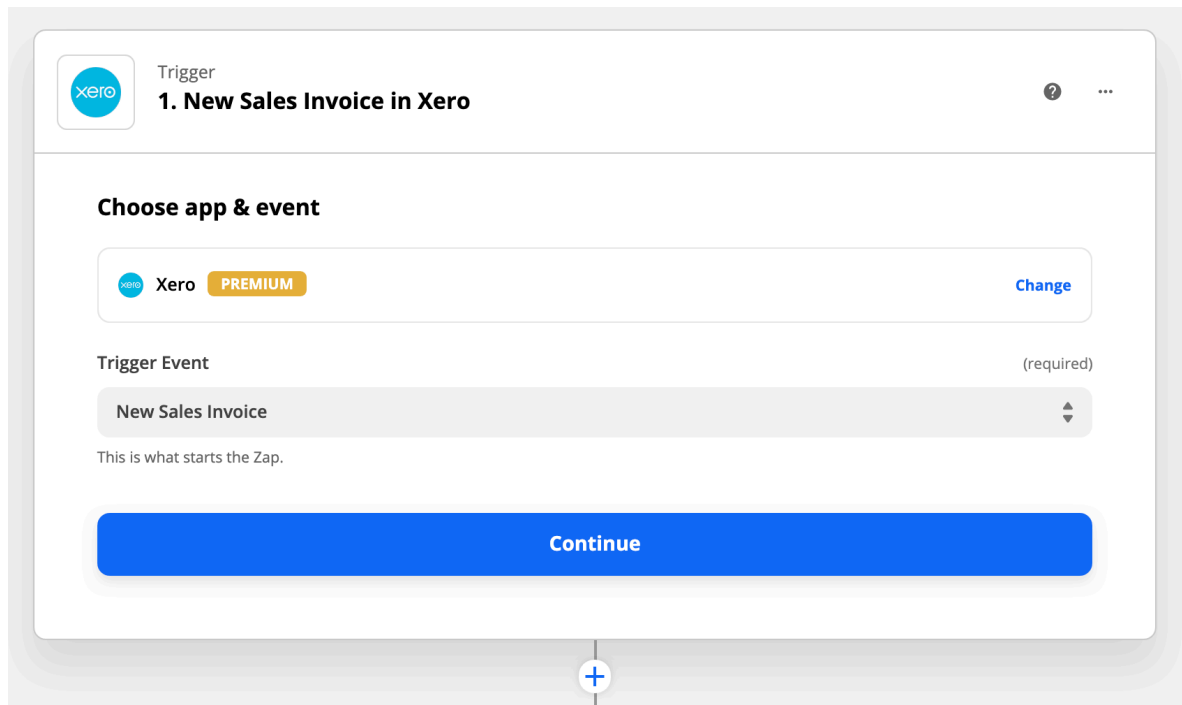
Setting up the Xero Trigger


Step 1: On your Zapier Dashboard, click on “Make a Zap!” on the top-left corner of the page.

Step 2: Select Xero as your Trigger App




Step 3: Choose a trigger that relates to your Giving Story. In this example, we have selected “New Sales Invoice”.



 Trigger ? ...

1. New Sales Invoice in Xero

Choose app & event

 Xero **PREMIUM** [Change](#)

Trigger Event (required)

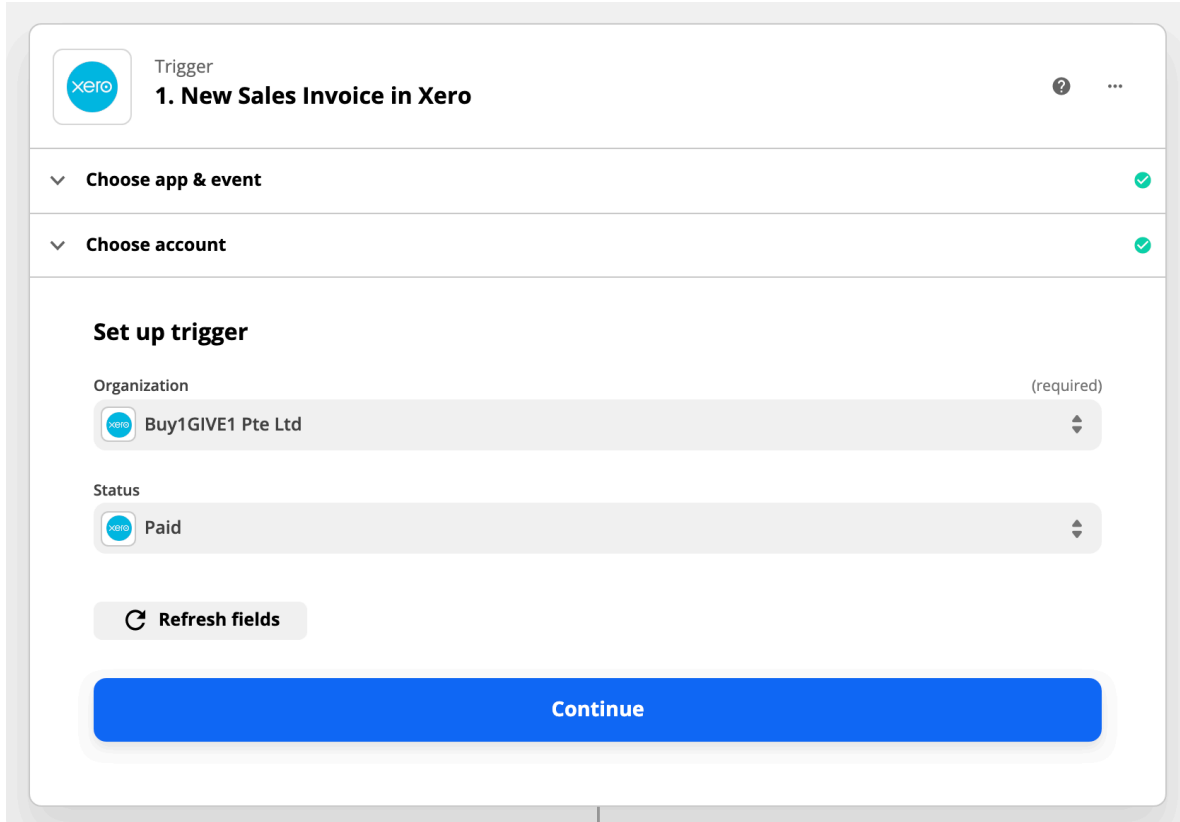
New Sales Invoice ▼

This is what starts the Zap.

[Continue](#)

[+](#)

Step 3: Follow the on-screen instructions to connect and authenticate your Xero account, as well as edit any available settings for your Trigger. In this example, we have requested to activate this Trigger for paid invoices only.



Trigger
1. New Sales Invoice in Xero

▼ **Choose app & event** ✓

▼ **Choose account** ✓

Set up trigger

Organization (required)
Buy1GIVE1 Pte Ltd

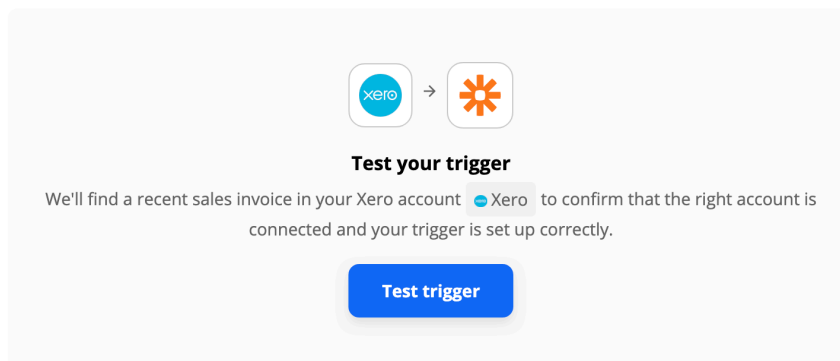
Status
Paid

↻ Refresh fields

Continue

Step 4: Zapier allows you to test every step of the automated workflow (or 'Zap') you create to ensure that everything is working fine. This usually requires pulling in sample data from your connected Apps – please follow all on-screen instructions and pick a sample to proceed. You can also choose to skip the testing phase if you do not have any data yet or if you are sure that you have set things up correctly.

Test trigger



Test your trigger


We'll find a recent sales invoice in your Xero account to confirm that the right account is connected and your trigger is set up correctly.



Test trigger

Test trigger



We found a sales invoice!

This sales invoice was found in your  Xero account. [Learn more about test data.](#)

 Sales Invoice C 

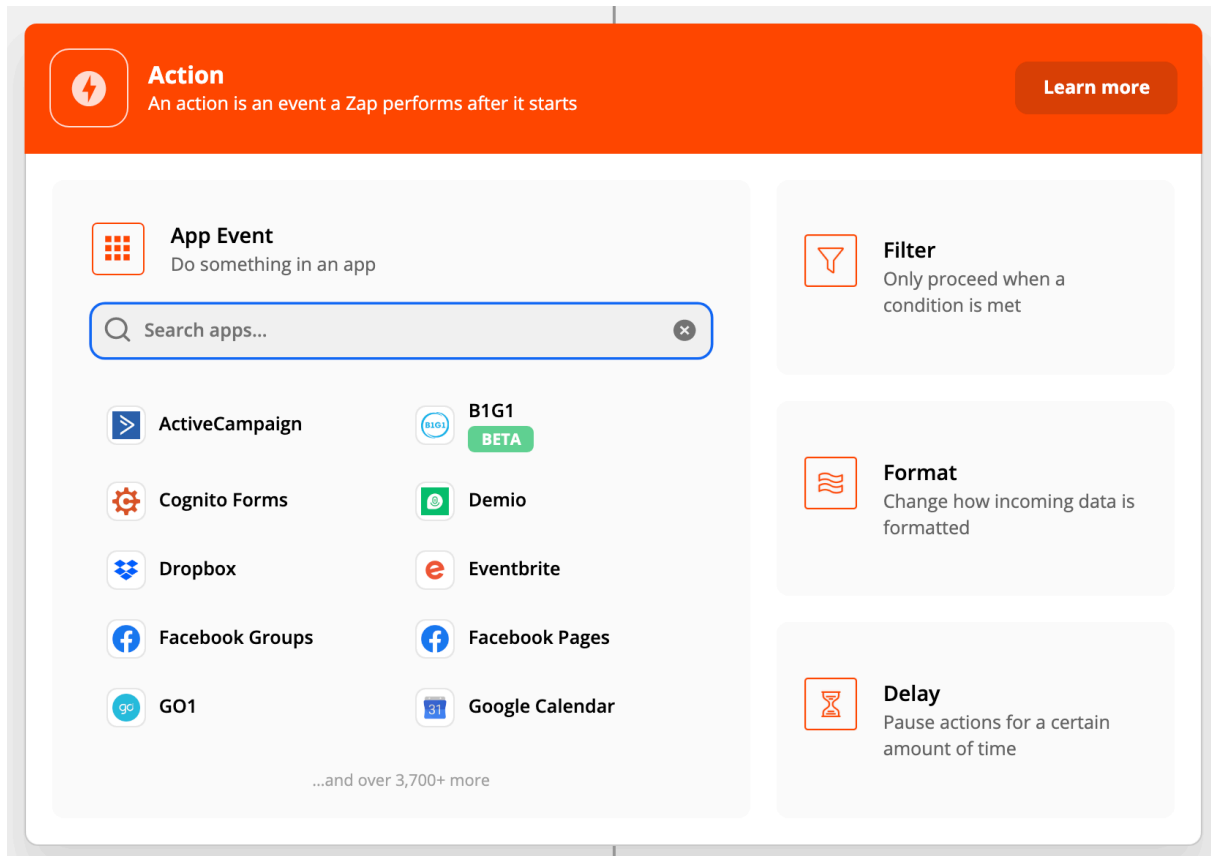
Search...

Contact:
ContactID: 40824cbd-3bfb
ContactStatus: ACTIVE
Name:
Addresses:
Address:
1:
AddressType: STREET
2:
AddressType: POBOX
Phones:
Phone:
1:
PhoneType: DDI
2:
PhoneType: DEFAULT
3:

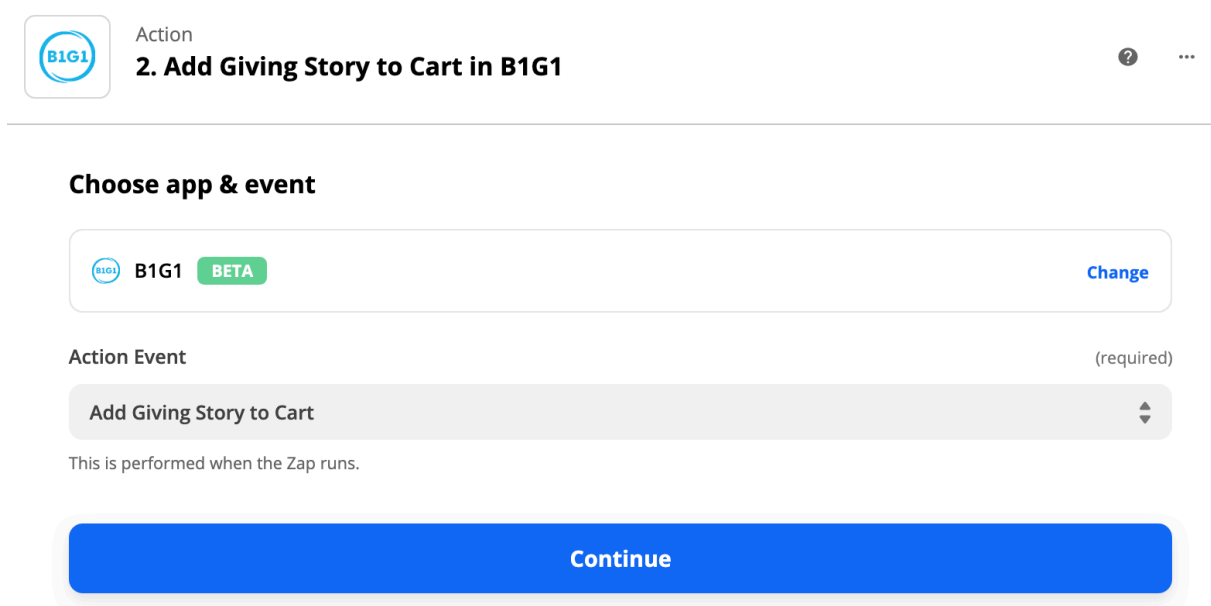
Continue

Setting up the Action to Add a Giving Story or Favourite Project to your B1G1 Cart

Step 5: Select 'B1G1' as your Action Zap




Step 6: Select the "Add Giving Story to Cart" option as your Action Event.



Step 7: Follow the on-screen instructions to connect and authenticate your B1G1 account then choose the Giving Story you'd like to integrate in this Zap

Then, click "Continue".



Action

2. Add Giving Story to Cart in B1G1

?

...

✓ Choose app & event

✓ Choose account

Set up action

Giving Story

(required)



When we send an email, we give 1 day of access to life-saving clean water to a family in Ethiopia.

⬆

⬇

Quantity 1 2 3

(required)


1

Enter the number of times you'd like to add this Giving Story to your cart.

↻ Refresh fields

Continue

Step 8 (optional): Click on “Test & Continue” and check that the right Giving Story is added to your B1G1 Giving Cart.

 Action



2. Add Giving Story to Cart in B1G1 ? ...

✓ Choose app & event

✓ Choose account

✓ Set up action

Test action Skip Test

 > 

Send Giving Story to B1G1
To test B1G1, we need to create a new giving story. This is what will be created:

Search giving story data...

Giving Story: When we send an email, we give 1 day of access to life-saving clean water to a family in Ethiopia.
Quantity: 1

Test & Review

Test & Continue

Step 9: Click on “Turn on Zap” then give your Zap a descriptive title.

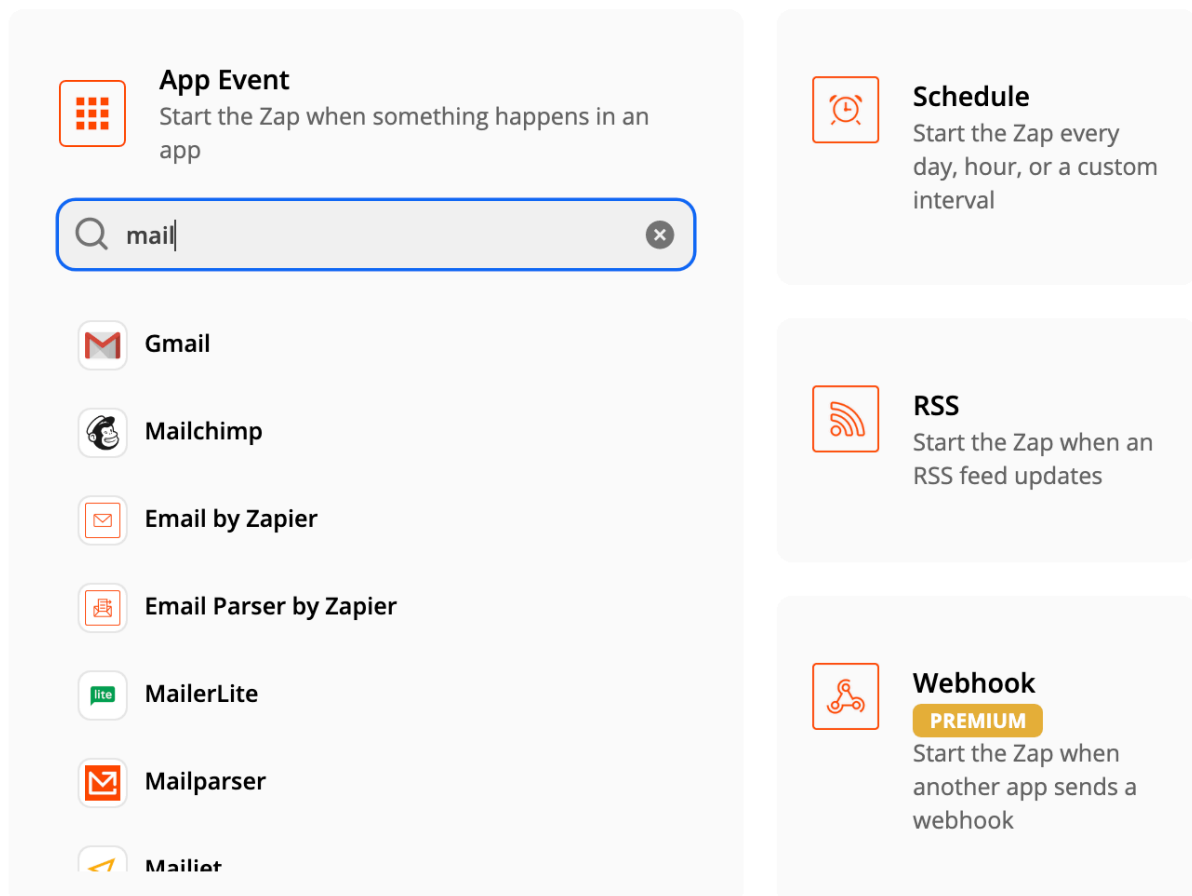
Well done, your Zap is working! From now on, whenever a new invoice is paid, a Giving Story is automagically added to your Giving Cart. All that’s left to do is to log in to B1G1 every week or month and check out your giving. 😊

Example 2: Integration with MailChimp

Setting up the MailChimp Trigger

Step 1: On your Zapier Dashboard, click on “Make a Zap!” on the top-left corner of the page.

Step 2: Select MailChimp as your Trigger App and choose a trigger that relates to your Giving Story. In this example, we have selected “New Subscriber”.





Trigger

1. Mailchimp

? ...

^ Choose app & event



Mailchimp

Change

Trigger Event

(required)

Choose an event

New Audience

Triggers when a new audience is added to your MailChimp accounts.

New Campaign

Triggers when a new campaign is created or sent.

New Subscriber

Triggers when a new subscriber is added to an audience.

INSTANT

New Subscriber in Segment or Tag

Triggers when a subscriber is added to a segment or tag within an audience.

New Unsubscriber

Triggers when any current subscriber unsubscribes from an audience.

INSTANT

New or Updated Subscriber


Triggers when a subscriber is added or updated in an audience.

INSTANT


Step 3: Follow the on-screen instructions to connect and authenticate your MailChimp account, as well as edit any available settings for your Trigger. In this example, we are activating this Trigger for new subscribers to the “Members in Sydney area” list.

Set up trigger

Audience (required)

 Members in Sydney area

i When samples are pulled in the next step for this trigger, the [GROUPINGS data](#) will be static, dummy data ("Example Group Category 1"). Use the example Group values to setup your Zap, and the data should reflect appropriately when the Zap runs.

 Refresh fields



Continue

Step 4: Zapier allows you to test every step of the automated workflow (or ‘Zap’) you create to ensure that everything is working fine. This usually requires pulling in sample data from your connected Apps – please follow all on-screen instructions and pick a sample to proceed. You can also choose to skip the testing phase if you do not have any data yet or if you are sure that you have set things up correctly.


Set up trigger



Test trigger

 → 

Test your trigger

We'll find a recent subscriber in your Mailchimp account  MailChimp (1.0.6) B1G1 to confirm that the right account is connected and your trigger is set up correctly.

Test trigger



Follow Steps 5 - 9 mentioned on Pages 7 - 9 to set up the Action to add a Giving Story to your B1G1 Cart. Once your Zap is ready, all that's left to do is to log in to B1G1 every week or month and check out your giving. 😊

Section 3: Frequently Asked Questions

Q: I am facing issues connecting my B1G1 account on Zapier. What can I do?

Try disconnecting and reconnecting your account on Zapier (see how to do so [here](#)). If you are facing password issues with your B1G1 account, let us know at team@b1g1.com.

Q: Why can't I see any Giving Stories or Favourite Projects in the dropdown when I set up my Giving Zap?

You will first need to create Giving Stories and add Favourite Projects on your B1G1 account. If you have done so but they are still not appearing in the dropdown, please check your B1G1 account connection on Zapier.

Q: Besides automatically adding Giving Stories to my Cart, what else can I do with B1G1 on Zapier?

Great question! Now that you've learnt the basics of B1G1 on Zapier, you can explore creating more interesting Giving Zaps. Here is the full list of Triggers and Actions that are supported for the B1G1 integration:

Supported Triggers

New Campaign Giving – *Triggers when a new giving is added to your Giving Campaign.*

Supported Actions

Add Giving Story to Cart – *Adds a Giving Story to your Giving Cart.*

Add Favourite Project to Cart – *Adds a Favourite Project to your Giving Cart.*

Q: I am using a free plan on Zapier. How does this affect my Giving Zaps?

Under Zapier's free plan, you can create up to 5 Zaps connecting non-Premium apps, which can run a total of 100 times (*Tasks*) per month. If your Zaps fall within this limit, you can use Zapier for free for as long as you like. To access more features, [see the upgrade options here](#).

Q: I love this! And I have suggestions on what else B1G1 can do with Zapier.

Awesome! Please reach out to us at team@b1g1.com. We'd love to hear from you.

Appendix: Overview of Zapier

[Zapier](#) is an online automation tool that allows you to create code-free, automated workflows (called *Zaps*) that connect apps you use every day.

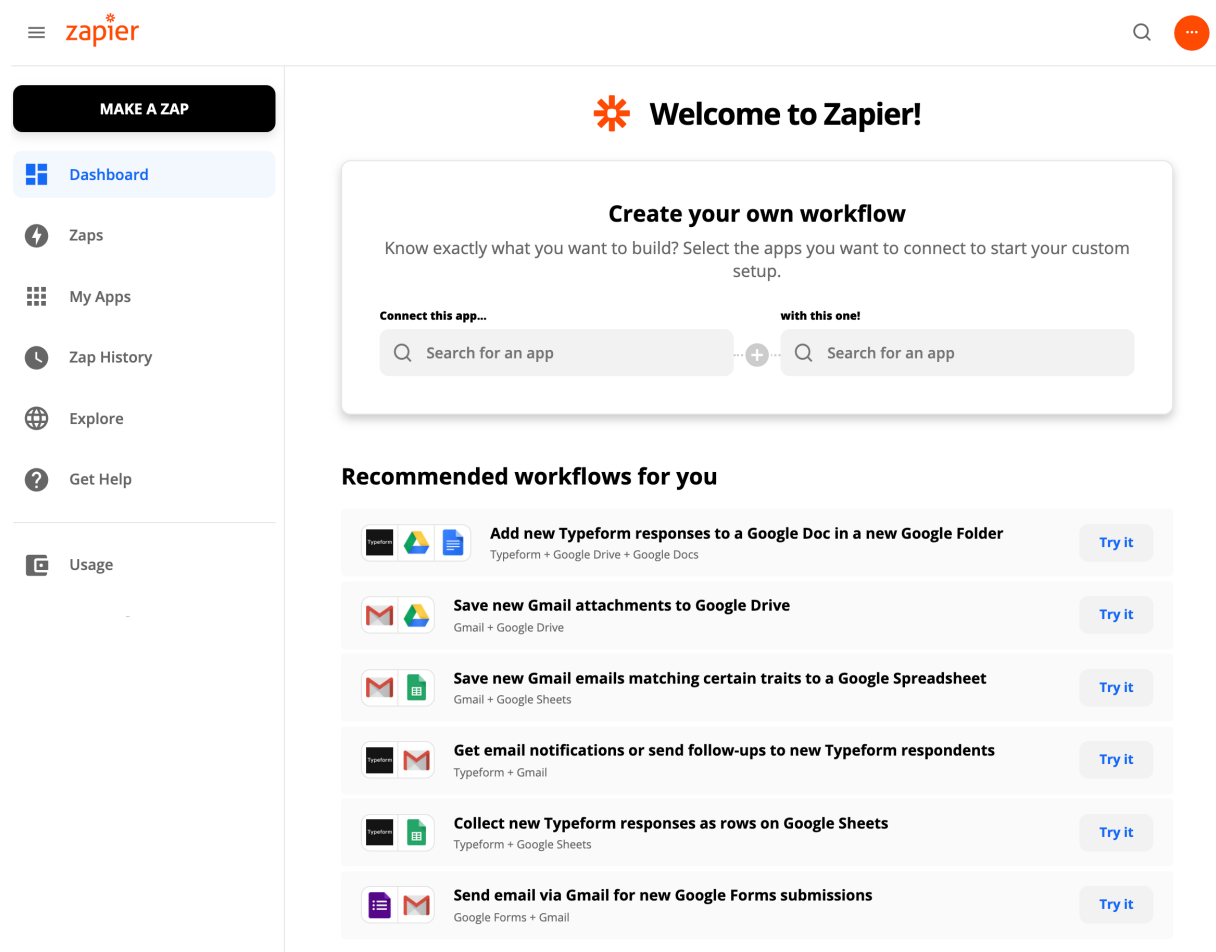
A Zap is a blueprint for a task you want to do over and over. In words, a Zap looks like this: "When I get a new thing in A, do this other thing in B." *(It sounds very much like a Giving Story, doesn't it!)*

In Zapier, the first part of the Zap is called the Trigger and the second part is the Action.

Zapier supports 3,000+ apps, and you can mix and match Triggers and Actions to automate just about anything. What's more, it's quick and easy to set up - you don't need to be a developer, anyone can make a Zap!

It's also free to start – simply head to <https://zapier.com/sign-up/> to create your account.

When you are first logged in, you'll be greeted with the "My Zaps" page:



MAKE A ZAP

- Dashboard
- Zaps
- My Apps
- Zap History
- Explore
- Get Help
- Usage

Welcome to Zapier!

Create your own workflow

Know exactly what you want to build? Select the apps you want to connect to start your custom setup.

Connect this app... with this one!

Search for an app ... + Search for an app

Recommended workflows for you

	Add new Typeform responses to a Google Doc in a new Google Folder Typeform + Google Drive + Google Docs	Try it
	Save new Gmail attachments to Google Drive Gmail + Google Drive	Try it
	Save new Gmail emails matching certain traits to a Google Spreadsheet Gmail + Google Sheets	Try it
	Get email notifications or send follow-ups to new Typeform respondents Typeform + Gmail	Try it
	Collect new Typeform responses as rows on Google Sheets Typeform + Google Sheets	Try it
	Send email via Gmail for new Google Forms submissions Google Forms + Gmail	Try it



Here's where you can begin making a new Zap, integrating your favourite business apps' Triggers and Actions with B1G1's. All the best, and have fun while you're at it! ☺

If you need more information to help you get started, we recommend reading these:

[What is Zapier?](#)

[How Zapier Works](#)

[Terminology](#)

We hope that what we build helps you embed giving into your business more effectively.
And we can't wait to see how you'll design wonderfully creative Zaps to create more impact in the world than anyone has ever imagined.

If you have other integration examples that you'd like to share, or if you would like to contribute feedback or suggestions, please drop us a note at team@b1g1.com.

We'd love to hear from you.