A STEP-BY-STEP GUIDE ON

AUTOMATING YOUR GIVING STORIES

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

With these APIs, you can integrate B1G1 with your own system or your favourite business tools that you use to track your daily business activities. Once you've set up the integration, whenever one of those activities happen, one of 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 the APIs to automate your Giving Stories. This guide consists of 2 sections:

Section 1: Integration with your own system

Section 2: Integration with your CRM tool

Section 1: Integration with your own system

Our API documentation is hosted online via a great tool called Postman. In the documentation, you can find example requests and responses for the APIs available in your B1G1 account, as well as details of the errors you may encounter.

Check it out here:
https://documenter.getpostman.com/view/6081117/S1TN6gJ5?version=latest

Right now, we have only made available the APIs to add your Giving Stories to the Giving Cart.

We will be expanding our public APIs in the coming months to allow you to add Favourite Projects to the Giving Cart, as well as access and update all your Giving Stories and Favourite Projects. Stay tuned!

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 the APIs provided in your B1G1 account, you can integrate your Giving Stories directly with your marketing automation and/or CRM tool.
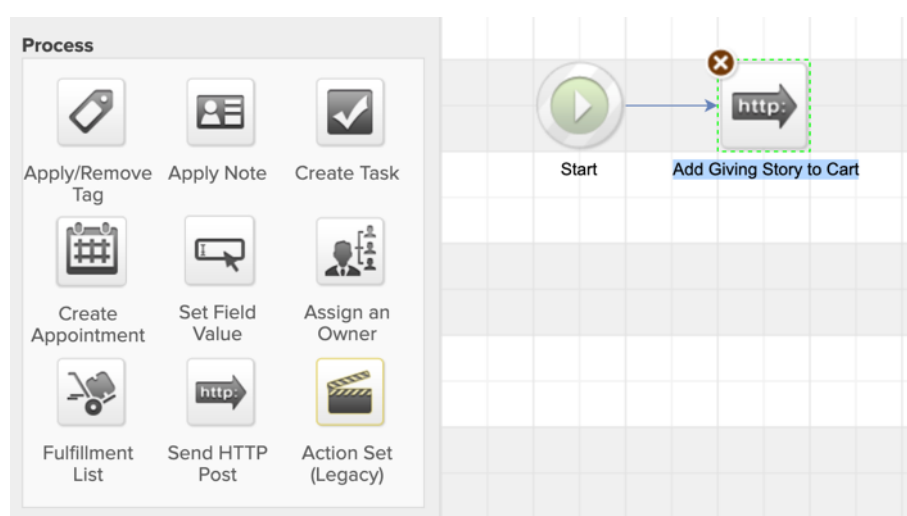
Here's a walkthrough of how to integrate B1G1 with the two most common CRM tools that B1G1 members use:
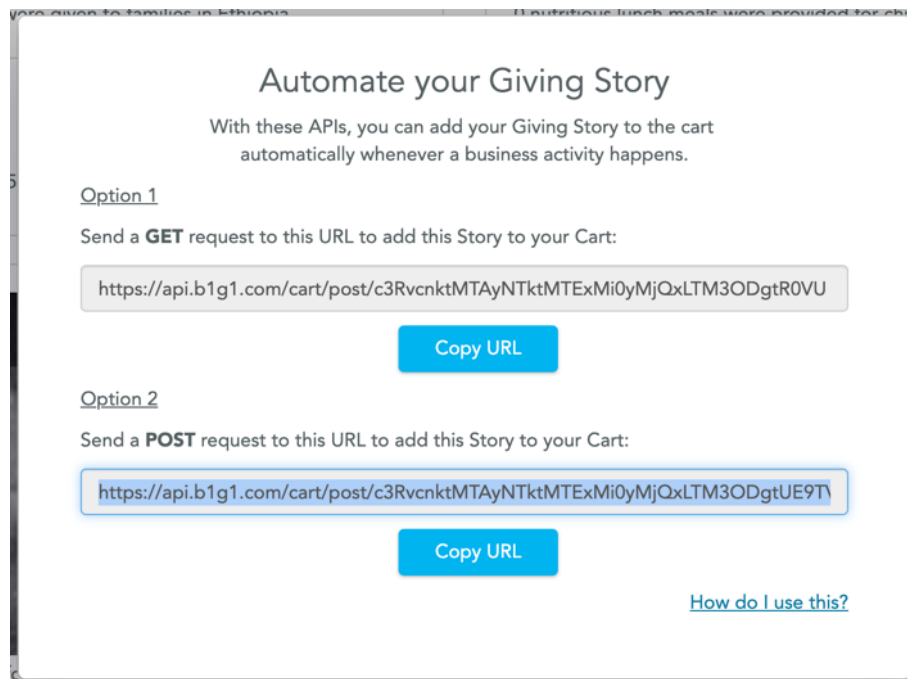
Example 1: Integration with InfusionSoft

To follow the steps below, you would need basic familiarity with the InfusionSoft Campaign Builder feature. If you are new to the Campaign Builder, [click here for InfusionSoft's help docs](#).

Step 1: Decide where, in your InfusionSoft Campaign, you want to automatically add a Giving Story to your Giving Cart. It can be part of any Campaign Sequence.
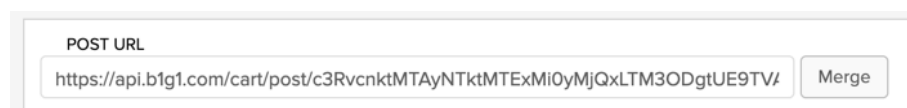
Step 2: In the Campaign Sequence, place a "Send HTTP Post" action where you want to add a Giving Story. The "Send HTTP Post" action can be found under the "Process" section. You can also rename the action to something you and your team can easily understand.
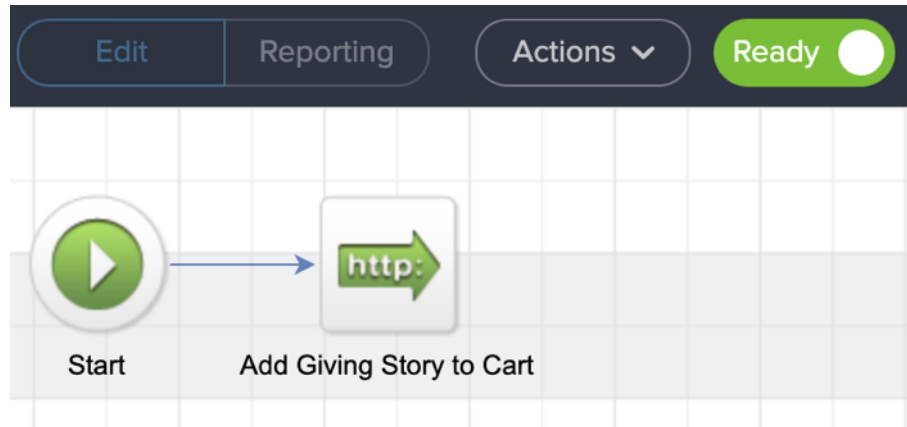
Step 3: In your B1G1 account, locate the Giving Story that you wish to automate, click on the "Automate" button, and copy the URL for use with POST requests.

Step 4: Paste this URL in the "POST URL" field of the HTTP Post. Leave everything else as it is and mark the HTTP Post action as "Ready".

Step 5: Exit the HTTP Post action and mark the Campaign Sequence as "Ready", then publish your Campaign. After you publish your Campaign, you'll see that all your Campaign elements are coloured in bright green, signifying that they are now 'live'.

Step 6 (optional): Create and put a test contact record through the Campaign Sequence and check that the right Giving Story is added to your B1G1 Giving Cart.
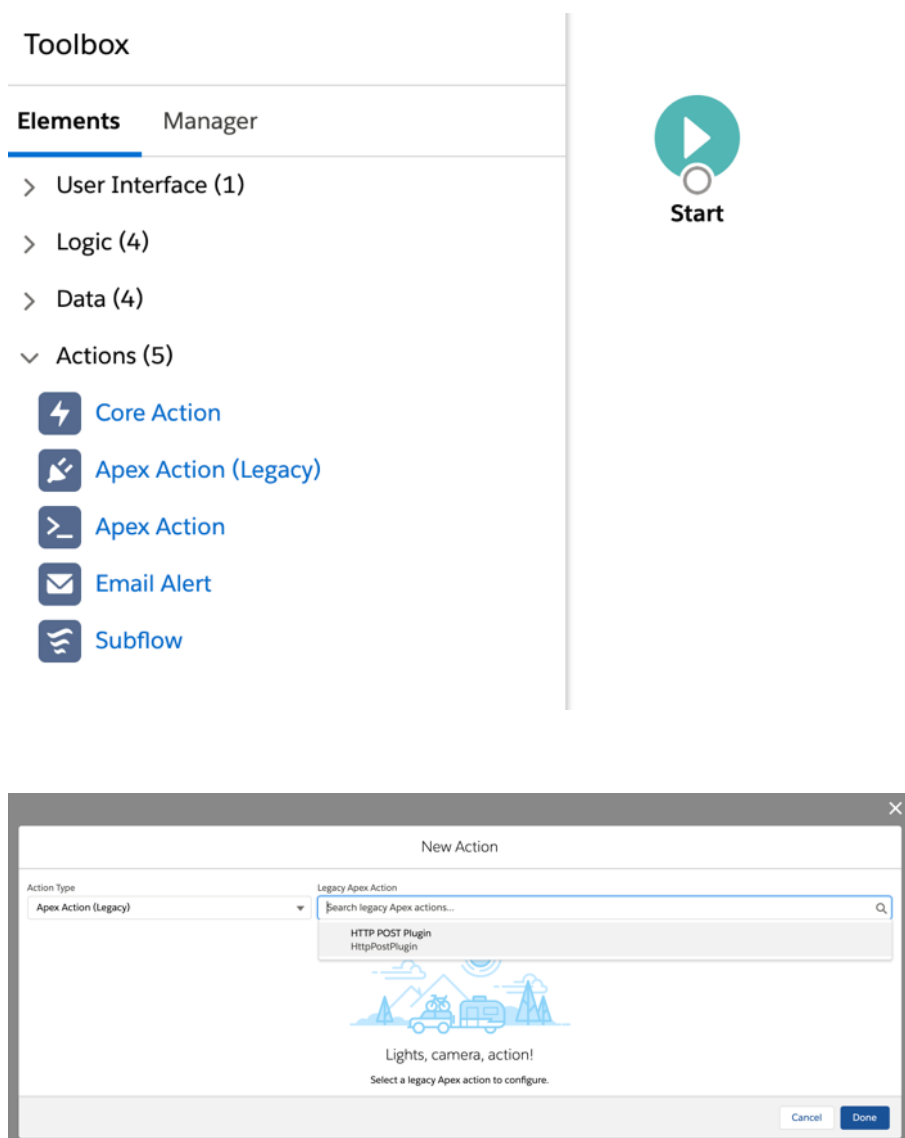
Well done, your Campaign is working! From now on, whenever a new contact record enters the specific campaign sequence, a Giving Story is automagically added to your Giving Cart. All that's left to do is to log in to B1G1 every week or month and check out your giving. ☺
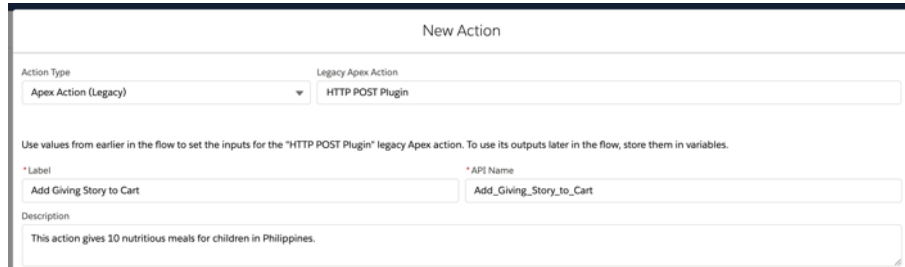
Example 2: Integration with Salesforce

To follow the steps below, you would need an Apex REST-based web service on Salesforce that can handle HTTP POST requests and your Salesforce Remote Sites need to be configured to allow POST requests to be sent to https://api.b1g1.com. If you need help, you can download a ready-made HTTP POST plugin and learn how to configure your Remote Site Settings on this page.
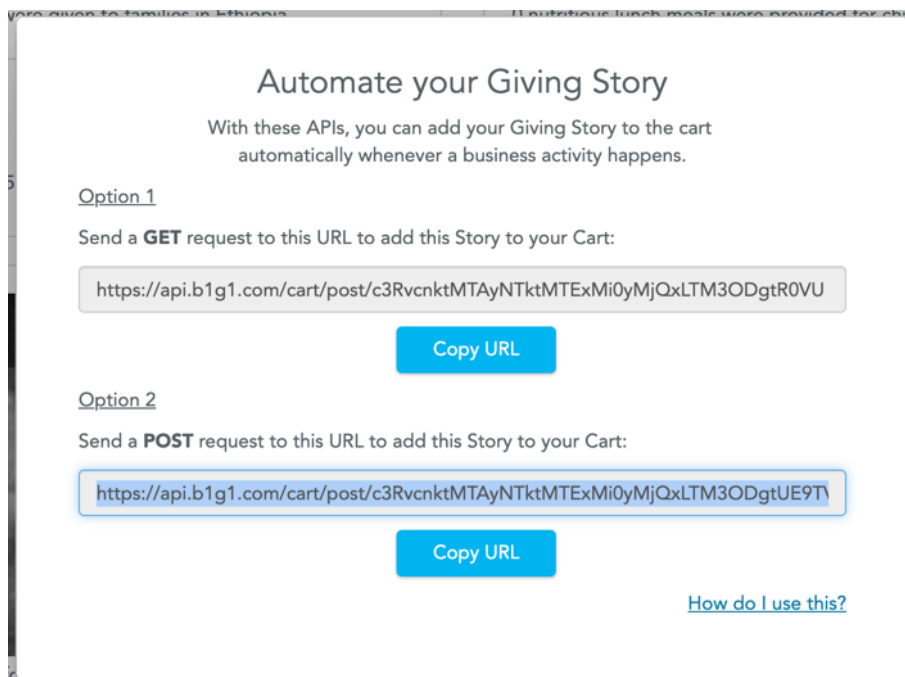
Step 1: Open a new or existing Flow within Salesforce.

Step 2: In the Flow Builder, drag the "Apex Action (Legacy)" action onto your canvas. In the pop-up window, select the HTTP POST Plugin in the Legacy Apex Action dropdown.
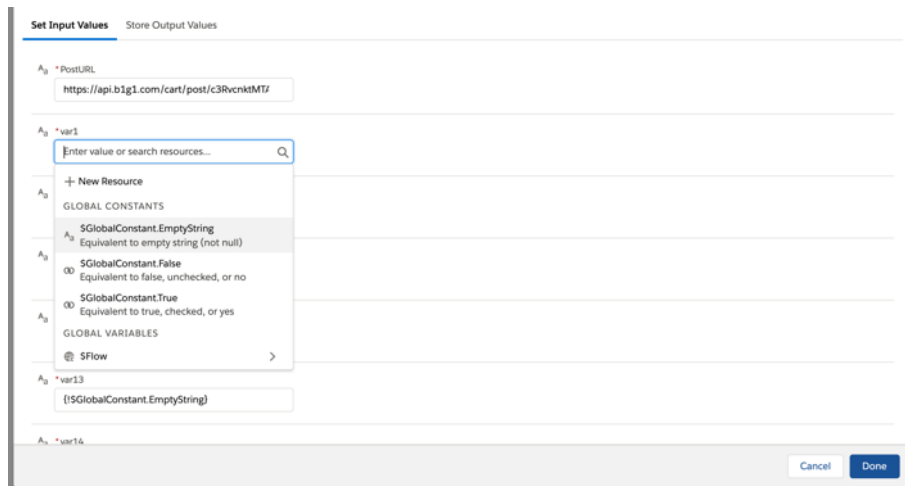
www.b1g1.com | team@b1g1.com

Step 3: Add a descriptive label for your HTTP POST action (e.g. "Add Giving Story to Cart"). The API Name will be auto-populated by Salesforce. You can also add a description so that you and your team can easily understand what the action does.

Step 4: In your B1G1 account, locate the Giving Story that you wish to automate, click on the "Automate" button, and copy the URL for use with POST requests.

Step 5: Paste this URL in the "POSTURL" field of the HTTP POST action. For the remaining Input Values, you can enter any value. In this example below, we use Salesforce's Global Constants default, {!$GlobalConstant.EmptyString}. Once all the required Input Values are filled, click "Done".

Step 6: Connect your HTTP POST action to the "Start" point or any other elements in your Flow, then click "Save".

Step 7 (optional): Click on "Debug" to test it, and check that the right Giving Story is added to your B1G1 Giving Cart.

Step 8: Activate the Flow. You are now ready to use it in your Salesforce Processes.

Well done, your Flow is working! From now on, whenever the Flow is launched in your Salesforce Process, 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. ☺

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 use these APIs 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 systems@b1g1.com.

We'd love to hear from you.