
Advanced Zaps for Nonprofits

[Classy integrates with Zapier](#) to empower organizations in streamlining workflows and simplifying repetitive tasks. This means nonprofits can transform manual, time-consuming processes into automated, efficient routines.

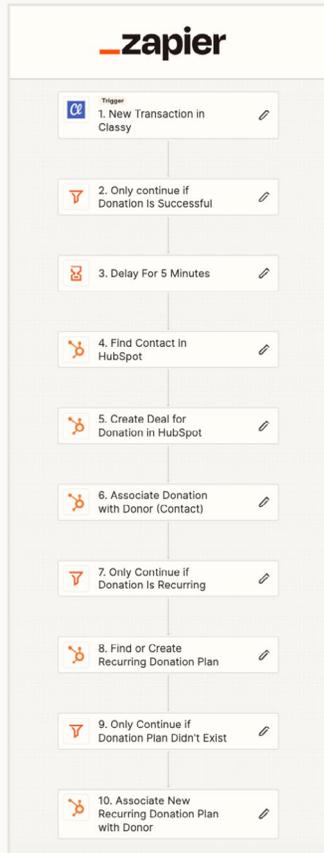
Discover how to stretch the boundaries of what's possible on Classy with the Zaps (automated workflows that link apps) outlined below.

Start saving time today.



Unlocking Donor Insights

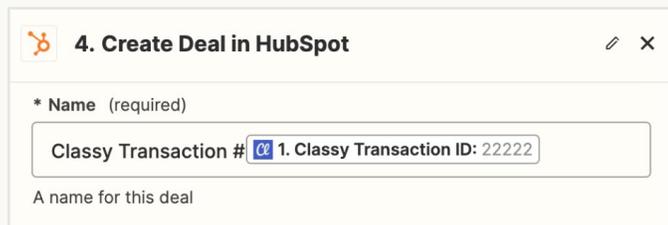
[Create a Deal in HubSpot When a New Transaction Is Made in Classy](#)

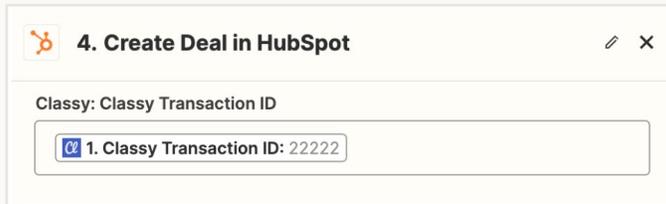


This Zap will create a new corresponding record in the customer relationship management (CRM) platform and associate it with the supporter's contact record in the CRM to track all donations and attributes appropriately.

When creating a record in your CRM for each transaction, we recommend using an object that supports monetary values, such as deals (HubSpot), opportunities (Salesforce), or similar. This will allow you to see all transactions associated with a supporter and measure their lifetime value (LTV) to your organization.

We recommend referencing the Classy Transaction ID when naming the transaction record in your CRM. This makes it easier to find the right record when later searching and ensures each record has a unique name.

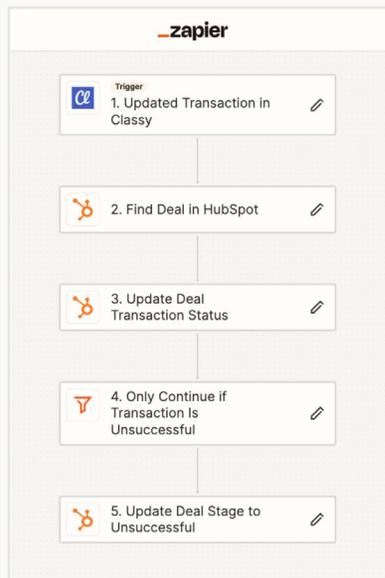




When recording donations in the CRM, including the Classy Transaction ID allows for easier and more efficient updates to those records in the future, particularly when triggered by the **Updated Transaction trigger**.

There's a five-minute delay in creating a new transaction record to ensure the donor's contact record gets created first in the CRM. Otherwise, both Zaps could run simultaneously, and the transaction-related Zap might return an error because it can't find the relevant contact record.

[Update a Deal in HubSpot When a Transaction Status Is Updated in Classy](#)



This Zap ensures that your CRM's record stage and status for each Classy transaction stays current. This is crucial for a CRM like HubSpot because the stage impacts the deal counting toward the contact's total revenue property value, which is used to measure LTV. Moving refunded or otherwise unsuccessful transactions to a stage like **Unsuccessful** marked in the system as **Closed Lost** won't count toward your LTV.

Advanced Zaps for Nonprofits

Deals

Setup Associations Pipelines Record Customization [View deals in the data model overview](#)

Use deal pipelines to manage the way you track potential revenue over time.

Select a pipeline: Donations </> Actions

Board customization

Customize what users can see when viewing the pipeline board

[Customize board and card view](#)
Set up your pipeline board view to show the information that matters most to your teams

[Customize deal tags](#)
Set up conditional colored tags to visually prioritize or categorize deal cards in your board and table views

Configure Automate Deal tags

STAGE NAME	DEAL PROBABILITY	EDITING ACCESS	CONDITIONAL STAGE PROPERTIES
Success	Won	Users with access to deals	
Unsuccessful	Lost	Users with access to deals	
Recurring Donation Plan	50%	Users with access to deals	

+ Add stage

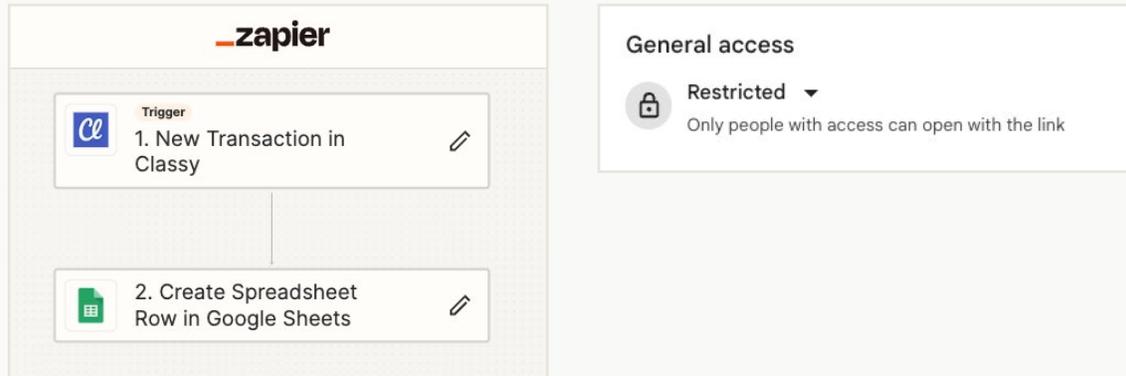
You may need to create a new pipeline in your CRM to store transaction records from Classy. In this example, we've created a new pipeline in HubSpot with customized stages for each transaction status. Note that the **Success** stage appears as **Deal Probability = Won**. This results in the deal value counting toward the contact's LTV (represented in HubSpot as **Total Revenue**).

With the Zaps fully configured, you'll find valuable high-level data about your supporters alongside granular details about each donation they've made, including the associated campaign and the marketing channel responsible for driving it (as long as you use Classy's [source codes](#) on your links).

Each CRM and donor database is different, so it's crucial to understand how the data appears in your platform and build your Zaps accordingly. The key is to avoid a flat data model where everything gets sent to the contact's overall record, and each new donation overwrites the last.

Data-Driven Decision-Making

[Create a New Row in Google Sheets for Each New Transaction in Classy](#)

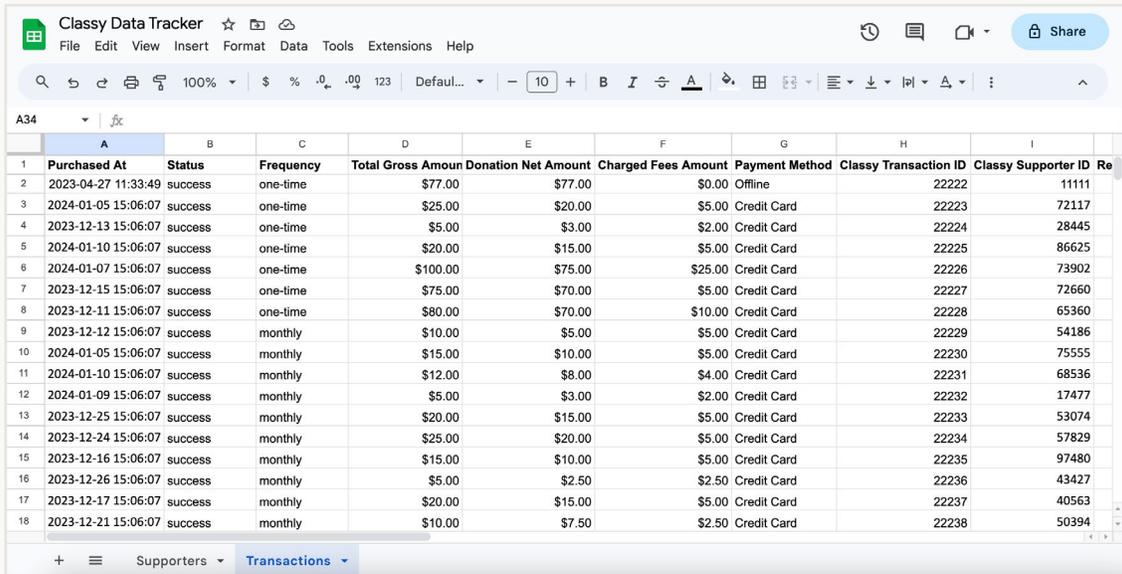


Restrict the Google Sheet you use to store donations so that only people with access can open the link since it may contain sensitive and personally identifiable information.



Using your Google Sheets for macro-level reporting, we recommend avoiding syncing personal information, like name, email, phone number, and location, to ensure data security. Instead, use fields like **Supporter ID** and **Transaction ID** to track supporters and their donations.

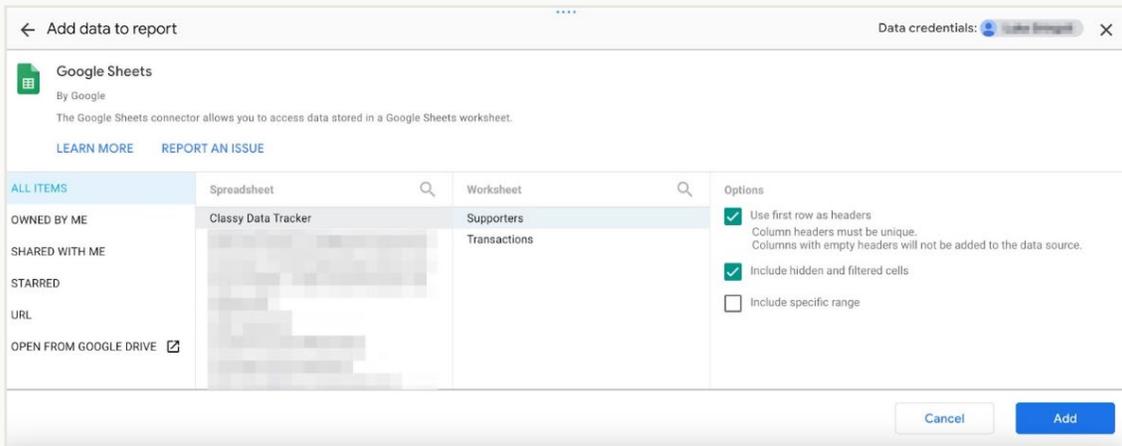
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The screenshot shows a Google Sheet titled "Classy Data Tracker" with a menu bar (File, Edit, View, Insert, Format, Data, Tools, Extensions, Help) and a toolbar with various icons. The spreadsheet contains a table with the following columns: Purchased At, Status, Frequency, Total Gross Amount, Donation Net Amount, Charged Fees Amount, Payment Method, Classy Transaction ID, and Classy Supporter ID. The data rows show various transactions from 2023 to 2024, including dates, times, success statuses, frequencies (one-time or monthly), amounts, and payment methods (Offline or Credit Card).

	A	B	C	D	E	F	G	H	I	Re
1	Purchased At	Status	Frequency	Total Gross Amount	Donation Net Amount	Charged Fees Amount	Payment Method	Classy Transaction ID	Classy Supporter ID	Re
2	2023-04-27 11:33:49	success	one-time	\$77.00	\$77.00	\$0.00	Offline	22222	11111	
3	2024-01-05 15:06:07	success	one-time	\$25.00	\$20.00	\$5.00	Credit Card	22223	72117	
4	2023-12-13 15:06:07	success	one-time	\$5.00	\$3.00	\$2.00	Credit Card	22224	28445	
5	2024-01-10 15:06:07	success	one-time	\$20.00	\$15.00	\$5.00	Credit Card	22225	86625	
6	2024-01-07 15:06:07	success	one-time	\$100.00	\$75.00	\$25.00	Credit Card	22226	73902	
7	2023-12-15 15:06:07	success	one-time	\$75.00	\$70.00	\$5.00	Credit Card	22227	72660	
8	2023-12-11 15:06:07	success	one-time	\$80.00	\$70.00	\$10.00	Credit Card	22228	65360	
9	2023-12-12 15:06:07	success	monthly	\$10.00	\$5.00	\$5.00	Credit Card	22229	54186	
10	2024-01-05 15:06:07	success	monthly	\$15.00	\$10.00	\$5.00	Credit Card	22230	75555	
11	2024-01-10 15:06:07	success	monthly	\$12.00	\$8.00	\$4.00	Credit Card	22231	68536	
12	2024-01-09 15:06:07	success	monthly	\$5.00	\$3.00	\$2.00	Credit Card	22232	17477	
13	2023-12-25 15:06:07	success	monthly	\$20.00	\$15.00	\$5.00	Credit Card	22233	53074	
14	2023-12-24 15:06:07	success	monthly	\$25.00	\$20.00	\$5.00	Credit Card	22234	57829	
15	2023-12-16 15:06:07	success	monthly	\$15.00	\$10.00	\$5.00	Credit Card	22235	97480	
16	2023-12-26 15:06:07	success	monthly	\$5.00	\$2.50	\$2.50	Credit Card	22236	43427	
17	2023-12-17 15:06:07	success	monthly	\$20.00	\$15.00	\$5.00	Credit Card	22237	40563	
18	2023-12-21 15:06:07	success	monthly	\$10.00	\$7.50	\$2.50	Credit Card	22238	50394	

We also recommend creating a Classy Data Tracker Google Sheet with tabs for supporters and transactions. This will allow you to use both data types in your dashboard.

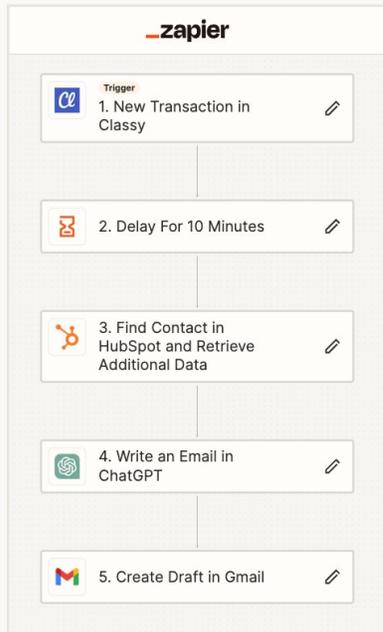


The screenshot shows the "Add data to report" dialog in Google Looker Studio. It features a "Data credentials" section with a "Classy Data Tracker" account. Below this, the "Google Sheets" connector is selected, and the "Classy Data Tracker" spreadsheet is chosen. The "Supporters" and "Transactions" worksheets are listed. The "Options" section includes checkboxes for "Use first row as headers" (checked), "Include hidden and filtered cells" (checked), and "Include specific range" (unchecked). "Cancel" and "Add" buttons are at the bottom.

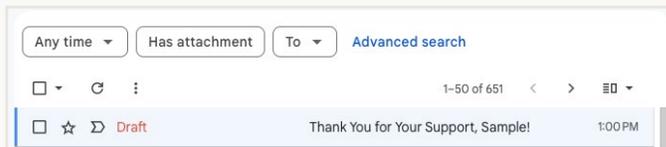
With your spreadsheet set up and syncing data, create a new Google Looker Studio report and select **Add Data**. Choose **Google Sheets**, then find the Classy Donation Trackers sheet you connected to Classy via Zapier. Once connected, build your report with any relevant Classy data to ensure it will stay updated with new supporters and transactions.

Hyperpersonalized Donor Communications

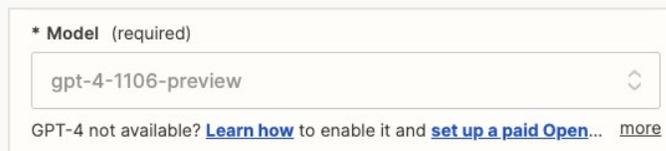
[Send a Personalized Thank-You Email for Each New Transaction in Classy](#)



This advanced Zap allows an organization's development team to easily create a personalized thank-you email using ChatGPT for each donation based on available details about the donor from Classy and HubSpot.



Save the email as a draft in the development team or person's email account or automatically send it on their behalf.



While you can use the free GPT-3.5 model in the ChatGPT set, this Zap works best with one of the available GPT-4

models. This requires additional setup (such as an API key) and incurs a small cost each time the action runs, but the output was far superior to the output of GPT-3.5 in our tests.

Advanced Zaps for Nonprofits

4. Write an Email in ChatGPT

* Email Prompt (required)

Please review this summary of a contact who just donated to Green Equity Alliance. Use these details to help craft a personalized thank you email on behalf of the organization. It should be heartfelt and draw connections with the work that the organization does and the person who donated.

Name:

Amount Donated (USD):

Location:

(IF APPLICABLE) Donating in honor of:

Frequency of donation:

Date of first donation:

Total donations made over all time:

Here is the donation thank you email that I want you to personalize:

Dear

I hope this message finds you well. On behalf of everyone at Green Equity Alliance, I want to extend a heartfelt thank you for your generous donation. Your support is crucial in our ongoing fight against environmental racism.

Your contribution is directly impacting communities disproportionately affected by environmental hazards. With your help, we are working tirelessly to advocate for equitable environmental policies, provide education on environmental justice, and support grassroots initiatives.

Every donation, big or small, makes a significant difference. Your commitment to our cause not only inspires us but also empowers the communities we serve. We are grateful for your trust in our mission and promise to continue our work with the same passion and dedication.

Please stay connected with us through our website and social media channels to see how your contribution makes a difference. Also, feel free to reach out if you have any questions or want to get more involved with our initiatives.

Once again, thank you for being a part of this important journey. Together, we can create a more just and sustainable world.

Warm regards,

Jordan Smith
Executive Director
Green Equity Alliance

Provide a detailed prompt describing the content of the email you... [more](#)

Thank You for Your Support, Sample! [GPT-4]

sample@member.org

Thank You for Your Support, Sample! [GPT-4]

Dear Sample,

I hope this message finds you well. On behalf of everyone at Green Equity Alliance, I want to extend a heartfelt thank you for your generous donation of \$77. Your support is crucial in our ongoing fight against environmental racism, and it's particularly meaningful as it comes from the vibrant community of San Diego, CA.

Your contribution is directly impacting communities disproportionately affected by environmental hazards. With your help, since your first donation on November 10, 2022, we are working tirelessly to advocate for equitable environmental policies, provide education on environmental justice, and support grassroots initiatives.

Every donation, big or small, makes a significant difference. Your commitment to our cause not only inspires us but also empowers the communities we serve. We are grateful for your trust in our mission and promise to continue our work with the same passion and dedication.

Please stay connected with us through our website and social media channels to see how your contribution makes a difference. Also, feel free to reach out if you have any questions or want to get more involved with our initiatives.

Once again, thank you for being a part of this important journey. Together, we can create a more just and sustainable world.

Warm regards,

Jordan Smith
Executive Director
Green Equity Alliance

Thank you for your generous donation! [GPT-3.5]

sample@member.org

Thank you for your generous donation! [GPT-3.5]

Dear Sample,

I hope this message finds you well. On behalf of everyone at Green Equity Alliance, I want to extend a heartfelt thank you for your generous donation. Your support is crucial in our ongoing fight against environmental racism.

Your contribution is directly impacting communities disproportionately affected by environmental hazards. With your help, we are working tirelessly to advocate for equitable environmental policies, provide education on environmental justice, and support grassroots initiatives.

Every donation, big or small, makes a significant difference. Your commitment to our cause not only inspires us but also empowers the communities we serve. We are grateful for your trust in our mission and promise to continue our work with the same passion and dedication.

Please stay connected with us through our website and social media channels to see how your contribution makes a difference. Also, feel free to reach out if you have any questions or want to get more involved with our initiatives.

Once again, thank you for being a part of this important journey. Together, we can create a more just and sustainable world.

Warm regards,

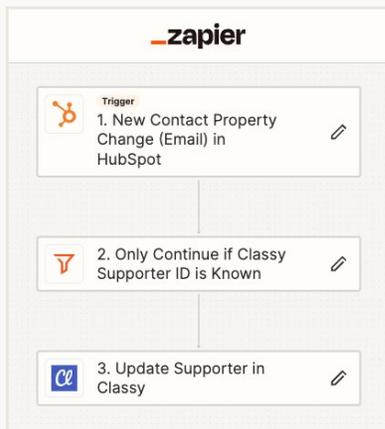
Jordan Smith
Executive Director
Green Equity Alliance.

Here's an example of a prompt used in the ChatGPT step. We recommend including a thank-you email template that's on brand and serves as the basis for what ChatGPT personalizes using additional contact-specific details.

As you can see, the output is much more specific when using GPT-4 versus GPT-3.5. Note that this isn't a real organization.

Keeping Classy Data Up to Date

[When a Supporter's First Name Changes in HubSpot, Update Their First Name in Classy](#)



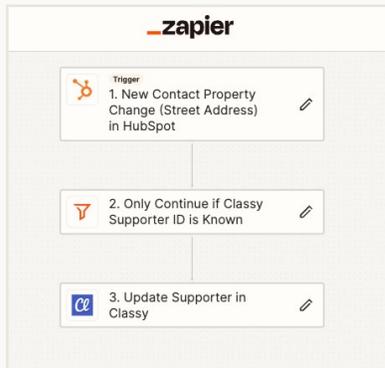
This Zap ensures that if a contact's first name changes in HubSpot, it gets reflected in Classy. If, like many organizations, you use the personalization feature in Classy's email tools to address each supporter by their first name, this helps you avoid using the wrong name, which could be impersonal or offensive.

Someone's name may have changed due to a change in managing donations in a household or because someone has elected to change their name to better express who they are.

[When a Supporter's Gender Changes in HubSpot, Update Their Gender Change in Classy](#)



This Zap looks for a change to the gender property in HubSpot and appropriately updates the supporter's corresponding Classy record. This is helpful in ensuring your development team addresses supporters correctly, and your demographic reporting within Classy is accurate.



[When a Supporter’s Location Changes in HubSpot, Update Their Location Change in Classy](#)

This Zap looks for changes to the supporter’s location in HubSpot. Since the **New Property Change** trigger can only look at one property at a time, the template focuses on the most granular property—**Street Address**.

If that changes, the Zap will refresh all relevant location fields in Classy, including **Street Address**, **City**, **State**, **Country**, and **Postal Code**. Note that HubSpot uses one Street Address field, whereas Classy has two **Street Address** fields.

This creates the potential for data quality issues. As such, we recommend using the Zap to clear any potential value for the second **Street Address** field in Classy when updating the first **Street Address** field.

Start Automating Today

One of the many advantages of leveraging Classy's Zapier integration is the wealth of helpful resources, video trainings, and content to guide you in your integration and automation journey.

Get started today!

- [How to Set Up and Use the Classy and Zapier Integration](#)
- [Classy and Zapier Nonprofit Integration \(Contains FAQs\)](#)
- [The Best Zapier Apps for Nonprofits to Amplify Fundraising](#)
- [Classy Integration Page \(Outlines, Triggers, and Actions\)](#)
- [Zapier Learn \(Free Self-Paced Training Modules\)](#)
- [Zapier University - Course 101 \(YouTube Playlist\)](#)