

AI Generated Action Summary from Addin Button

Thought I would share this new Power Automate flow that is becoming very useful. Instead of staff having to read through the last 2 years of action reports, this summary creates a 2-3 paragraph summary of what happened. You control how far back the AI looks in the filter array.

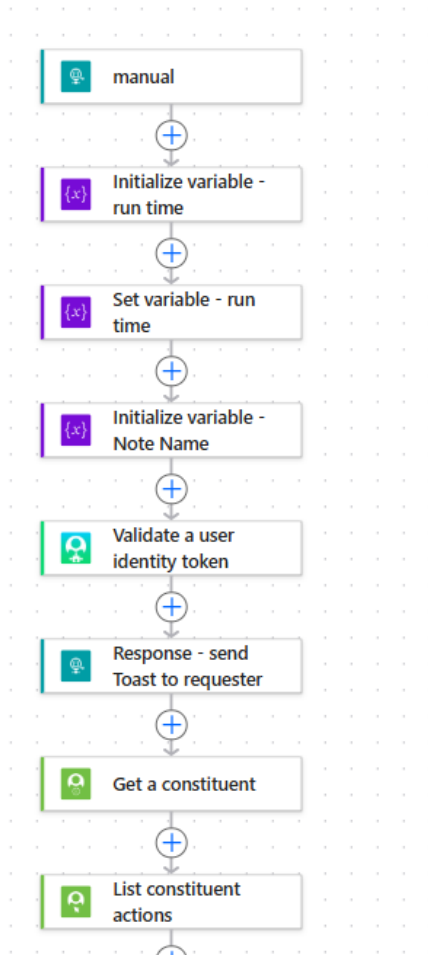
Description

This flow is triggered by a request from a Blackbaud application. It validates the user's identity, sends a notification, and retrieves a constituent's details and their actions from the past two years. The actions are filtered, sorted, and summarized using AI, generating a concise summary in HTML format. The summary is then either updated in an existing note or created as a new note for the constituent, and finally, an email with the summary is sent to the requester. The process automates the creation and delivery of AI-generated action summaries.

What you will need:

- Blackbaud Raisers Edge NXT Constituents
- Blackbaud Raisers Edge NXT Interactions
- Blackbaud SKT Add-in
- Outlook or Gmail

Skill Level: Intermediate



Filter array - only include Actions in last 2 year from run time



Select data you want analyzed in the Summary



Compose - convert array to string and sort descending based on recency



Create text with GPT using a prompt



List constituent notes



Filter array - Notes

For each - See if there is a Action Summary



For each 1



Set variable - Action Note Name



Condition

True



For each



Update a constituent note



False



1 Action



Send email (V2)

