

blackbaud®

Help, Where's the On-Ramp?

Getting Started with Power Automate

Maire Moriarty – maire.moriarty@blackbaud.com

Gabriela Zelaya – gabriela.zelaya@blackbaud.com

Marilyn Garvey – mjgarvey@dioknox.org

»♥« bbdevdays

Agenda

1. Welcome + Why Power Platform matters
2. What is the Power Platform?
3. Deep dive: Power Automate, Power Apps, Power BI
4. Blackbaud-specific scenarios + connector landscape
5. Certified vs. custom connectors (SKY API)
6. Where Power Platform fits across Blackbaud solutions
7. Getting started resources + what's next

Welcome + Why Power Platform Matters

The challenge: *Nonprofits juggle dozens of manual processes that drain staff time away from mission-critical work*

Power Platform: *A low-code/no-code suite from Microsoft that lets everyday users automate workflows, build apps, and visualize data*

Why it matters for Blackbaud users: *Native connectors and the SKY API bridge the gap between Blackbaud and your Microsoft ecosystem*

Session goal: *Give you a clear on-ramp so you leave knowing where to start and who can help*

What Is the Power Platform?

Create apps and workflows across your organization with low-code tools.



Power Automate

Automate repetitive tasks and approval workflows across your apps and services



Power BI

Guide decision making and transform raw data into interactive dashboards and real-time insights



Power Apps

Build custom business apps without writing code — forms, portals, mobile tools



Power Pages

Create websites and customer solutions fast while securely storing and managing data



Copilot Studio

Transform customer and employee experiences when you build custom copilots

Power Automate: Make Things Happen Automatically

What it does: Creates automated workflows between apps and services, triggered by events, schedules, or button clicks

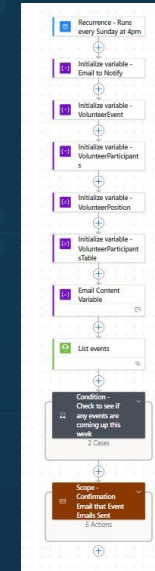
Real-world examples:

Auto-send a thank-you email when a gift is recorded in RE NXT

Post a Teams notification when a major donation comes in

Route approval requests for event expenses through managers

Tip: Start with a pre-built template — hundreds are available for common scenarios



Stewardship
To: fitz.darcy@pemberly.co.uk
Bcc: VolunteerTeamLead@Org.org

High importance

Dear Mr. Fitz Darcy, RN,
Thank you for Volunteering!

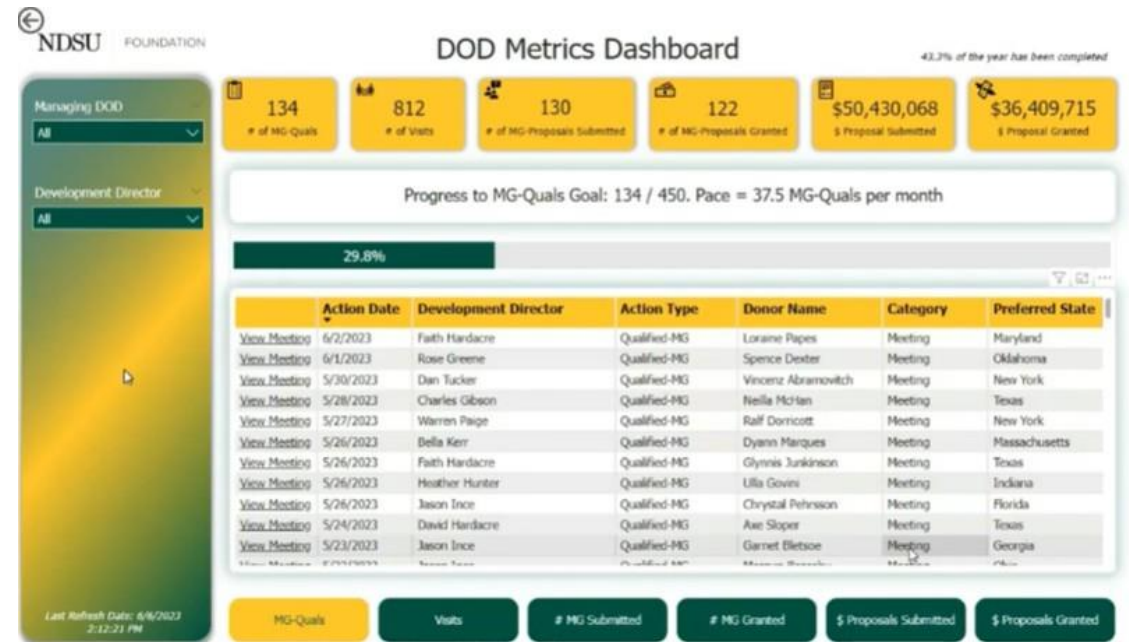
CLINIC DETAILS:
SMLC Knox Clinic (June 2026)
Date: 06/02/2026
Time: 08:30 AM - 03:00 PM

CLINIC VOLUNTEER TEAM:

Fellow Volunteers	Volunteer Role
Mr. Fitz Darcy, RN	Computer/Procedure Nurse
Dr. Lizzie Bennett-Darcy	Patient Education

Power BI: Turn Data into Dashboards

- **What it does:** Connects to your data sources and transforms them into interactive dashboards and reports
- **Real-world examples:**
 - A fundraising dashboard tracking campaign performance in real time
 - Enrollment trend reports pulled directly from Blackbaud data
 - Board-ready snapshots combining financials and program outcomes
- **Tip:** Download Power BI Desktop (free), connect to an Excel file, and explore the visualization gallery

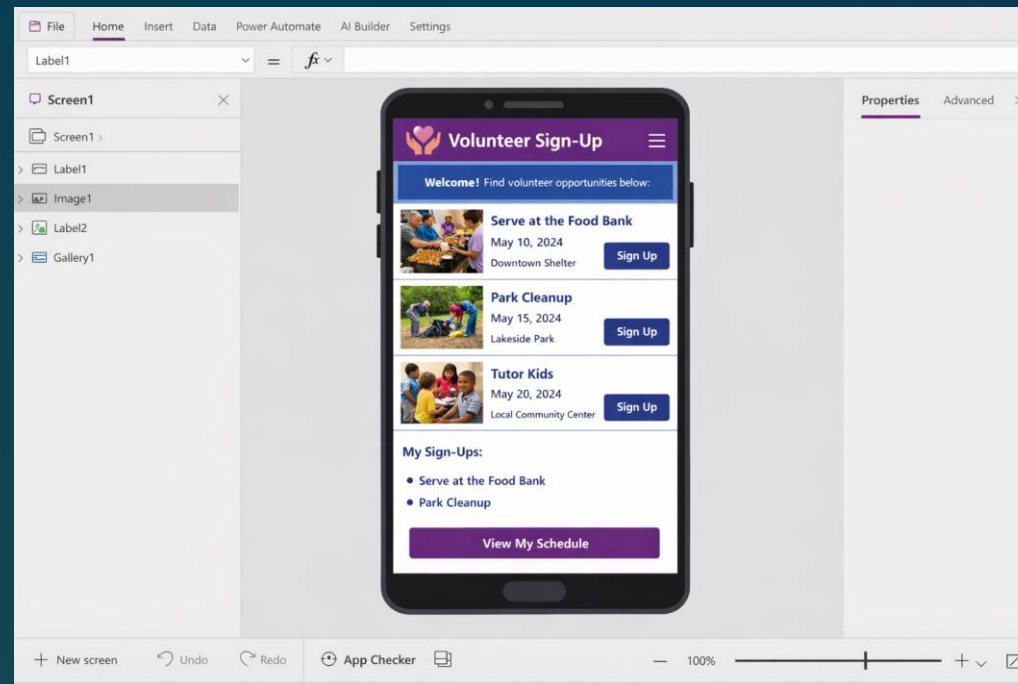


Power Apps: Make Your Own Simple Apps

What it does: Build custom apps with drag-and-drop — canvas apps for full design control, or model-driven apps tied to your data

A volunteer sign-up form that adds new volunteers to RE without needing RE access

A custom tile on a constituent record that allows view only users to update opportunities



Blackbaud Scenarios + Connector Landscape

Where automation fits in your Blackbaud workflow:

Sync constituent data between RE NXT and external systems

Automate gift acknowledgment letters and receipts

Push enrollment or event data into dashboards automatically

Connector landscape: *900+ pre-built connectors plus custom connectors for any REST API, including Blackbaud SKY API*

Key takeaway: *Power Platform connects your tools — you don't have to choose between them*

Certified vs. Custom Connectors (SKY API)



Certified connectors: Pre-built, Microsoft-verified integrations. Plug-and-play, no coding needed (e.g., SharePoint, Outlook, SQL Server)



Custom connectors: You build these to connect to any REST API — this is how you connect to Blackbaud SKY API



SKY API + Power Platform workflow:

Register your app at developer.blackbaud.com
Import the SKY API OpenAPI spec as a custom connector
Use it in flows and apps just like any built-in connector



Pro tip: Start with certified connectors for quick wins, then add custom connectors as needs grow

How the Power Platform Tools Work Together

PowerApp > triggers a Power Automate flow upon submission

Power BI > Power Automate Flow pulls information from your data source

Power Pages > triggers a Power Automate flow upon submission

CoPilot Studio > triggers a Power Automate flow upon submission



Examples for Inspiration

- *Action Email* – Let team members know what they have coming up without opening Raiser's Edge.

Good Morning,

Your attention is kindly requested for the constituent action records listed below, which are currently outstanding. Thank you for reviewing and updating these records, it is crucial to ensure accurate and up-to-date information and reporting.

Constituent Name	Action Due Date	Action Summary	Priority
[REDACTED]	05/12/2026	sent sample ack letter	High
[REDACTED]	05/21/2026	Moved up to due today	Normal
[REDACTED]	04/01/2026	[REDACTED]	Normal
[REDACTED]	05/19/2026	Provided from Parish Secretary	Normal
[REDACTED]	05/28/2026	Let Donor know when Gift arrives	Normal
[REDACTED]	05/28/2026	[REDACTED]	High
[REDACTED]	05/28/2026	DONOR REQUEST: "I would like information about paying from an IRA"	Normal
[REDACTED]	05/29/2026	Reach out to Donor to let her know CC has been declined	Normal
[REDACTED]	05/29/2026	Reached out to let know CC was declined	Normal









These are the actions that are currently open and assigned to you in WebView (Assigned Solicitor in DBV).

Your dedication to maintaining the quality of our database is greatly appreciated. Your efforts contribute significantly to the success of our relationship management initiatives.

Thank you for your attention to this matter.

Have a wonderful day!

- *Acknowledgement* – Daily customized word file to just review and print

Name	Status	Date modified	Type
 Acknowledgements2026-05-31.docx		9/24/2025 10:32 PM	Microsoft Word
 Acknowledgements2026-05-30.docx		9/24/2025 10:32 PM	Microsoft Word
 Acknowledgements2026-05-29.docx		9/24/2025 10:32 PM	Microsoft Word
 Acknowledgements2026-05-28.docx		9/24/2025 10:32 PM	Microsoft Word

What now?

- *Embrace the frustration*
- *Start simple and the possibilities will come*
- *How will you know if it's a 2 hour project or a 20 hour project?*
- *Start small and see what comes! Let the people tell you what they will use with their actions*
- *Identify when your projects will start giving you hours back – not everything has an ROI*
- *Test test test!*
- *Be kind to yourself*

Getting Started Resources + What's Next

Where to begin:

Microsoft Learn — free, self-paced Power Platform training

Power Automate templates gallery — start from a working example

Blackbaud Developer Portal (developer.blackbaud.com) — SKY API docs

Power Platform Community + user groups

Blackbaud University

What's next at bbdevdays: Hands-on labs, deeper technical sessions, and the Blackbaud developer community

Your action item: Pick one manual process this week, find a template, and build your first flow

Questions?

blackbaud®

Thank you

maire.moriarty@blackbaud.com

gabriela.zelaya@blackbaud.com

mjgarvey@dioknox.org

 bbdevdays