

CANDID CONNECTOR by ImagineCRM

ImagineCRM uses the Lightning Platform by Salesforce to solve a nonprofit data automation dilemma.

OVERVIEW

While collaborating with Candid, executives from Imagine CRM, a registered Salesforce Partner, recognized a market need for an integration in Candid's application programming interface (API) that would automate the accessibility of a broad range of key performance data for non profit organizations during the life cycle of a grant.

By using Salesforce's Lightning Platform, ImagineCRM built the Candid Connector, creating a profitable business solution and resolving pain points for foundation administrators, project managers and API end-users at all levels.

CLIENT FEEDBACK

Why do you use the Candid Connector by ImagineCRM?

To reduce administrative manual entry of nonprofit data. The Candid Connector by ImagineCRM allows us to automatically sync nonprofit data directly into our Salesforce instance so we can make important decisions about grant giving.

How often do you use the Candid Connector by ImagineCRM?

The Candid Connector by ImagineCRM is used manually to sync records in real time as needed. We are also able to schedule the sync on a regular cadence. Ideally, we would do this once a week for organizations that have an active agent.

If Candid Connector by ImagineCRM didn't exist, what would you be doing instead?

A staff member would have to manually add data to our Salesforce instance.

What is the number one benefit you've found from using Candid's tool?

The time it saves our staff.



CANDID CONNECTOR BY IMAGINECRM OFFERS:



EASY INSTALLATION

- Installs within 30 minutes
- Simple configuration
- Ability to customize metadata within your page layouts



INCREASED ACCURACY

- Account enrichment
- Ability to create a scheduled sync
- Restrict API calls with defined criteria

ABOUT IMAGINECRM

ImagineCRM is a fast-growing, minority and woman-owned company with a commitment to diversity. Our mission is to help customers create positive social impact. We have numerous foundation and nonprofit corporations as clients. We are located in Pasadena, CA and have been in business for 7 years with a team of 11 people.

OUR MISSION

To improve the way our clients do business by:

- Solving issues that must be addressed in order to run your organization
- Create efficient processes that decrease administrative costs
- Providing a 360-degree view of your data
- Establishing processes to improve the accuracy of your data
- Promoting scalability by using iterative approach to the design of your organization

CANDID CONNECTOR \$5000 ONE TIME FEE

Candid API licenses are a separate purchase from the Candid Connector by Imagine CRM.
To learn more visit: <https://candid.org/?ref=learn>

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