

CANDID CONNECTOR CASE STUDY

by ImagineCRM

Imagine CRM 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?

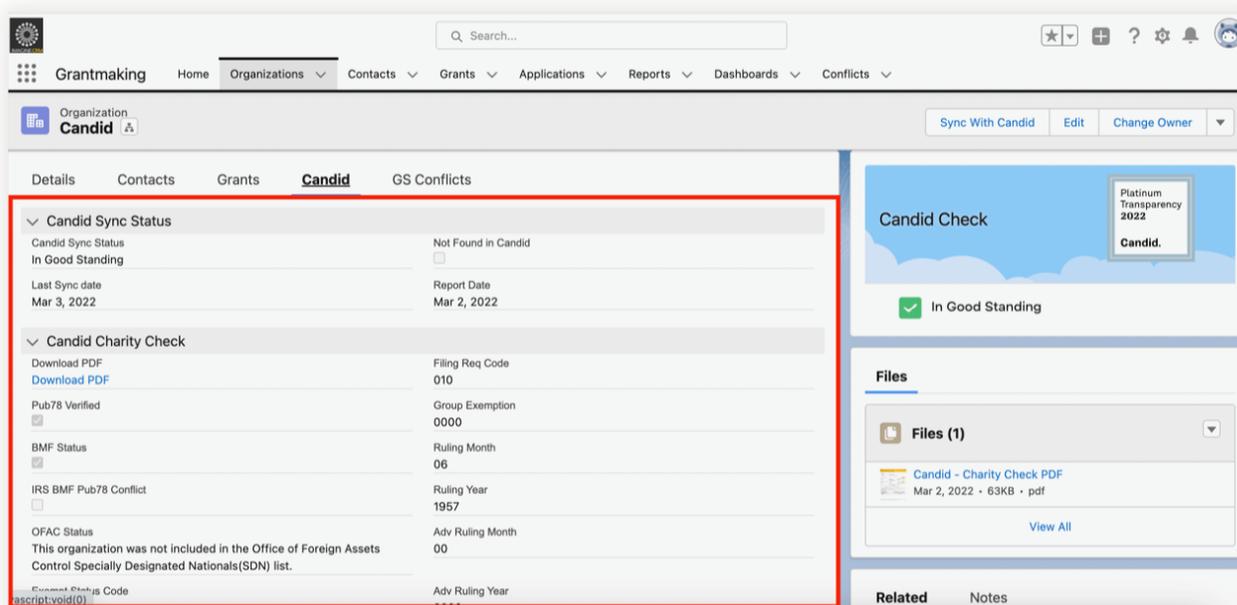
The time it saves our staff.



APPROACH

Identify the Pain Points

Foundations rely on key performance indicator data to review non profit organizations during the life cycle of a grant. Prior to the Candid Connector by ImagineCRM, foundation analysts would manually transfer data points from Candid into the foundation grand management system. They would also source data from non-profits by searching their website, reviewing annual reports, contacting the organizations to access missing data and by other inefficient means. Alternatively, some Candid API clients pursued a technical approach by contracting with a vendor to develop an interface using custom coding. However, there were several barriers to this approach including cost, time, complexity, vendor selection and ongoing system maintenance requirements.



The screenshot displays the Candid Connector interface for an organization named 'Candid'. The interface is divided into several sections:

- Navigation:** Includes a search bar and a menu with options like Home, Organizations, Contacts, Grants, Applications, Reports, Dashboards, and Conflicts.
- Organization Details:** A table of key performance indicators (KPIs) for the organization, including:
 - Candid Sync Status:** Candid Sync Status (Not Found in Candid), In Good Standing (checkbox), Last Sync date (Mar 3, 2022), Report Date (Mar 2, 2022).
 - Candid Charity Check:** Download PDF, Filing Req Code (010), Pub78 Verified (checkbox), Group Exemption (0000), BMF Status (checkbox), Ruling Month (06), IRS BMF Pub78 Conflict (checkbox), Ruling Year (1957), OFAC Status (This organization was not included in the Office of Foreign Assets Control Specially Designated Nationals(SDN) list), Adv Ruling Month (00), and Adv Ruling Year (1957).
- Candid Check Summary:** A blue box indicating 'Platinum Transparency 2022' and 'Candid.' with a green checkmark and 'In Good Standing' status.
- Files:** A section titled 'Files (1)' containing a PDF file named 'Candid - Charity Check PDF' (Mar 2, 2022 - 63KB) with a 'View All' link.
- Related:** A section for 'Notes'.

RESULTS

Foundations benefit from the Candid Connector by ImagineCRM because the interface tool automates their accessibility to key performance indicators for non-profits. This eliminates the need to manually build and maintain inefficient in-house databases. Foundations are able to purchase the API from Candid and the Candid Connector by ImagineCRM. This is now a comprehensive and convenient plug-and-play system for grants managements. ImagineCRM provides the application maintenance, giving clients assurance the information will always be accessible, timely and secure.

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

CONCLUSION

Candid Connector by ImagineCRM is a patented and marketable tool, giving all parties confidence in the safety, reliability and validity of the contents. The packages allows access to the following Candid API's*: Essentials, Charity Check PDF, and Premier. Through this tool, our clients are accessing grant data that provides the information they need to make strategic funding decisions.

**Candid API licenses are a separate purchase from the Candid Connector by Imagine CRM.*

To learn more visit: <https://candid.org/?ref=learn>

ABOUT IMAGINECRM

ImagineCRM is fast growing, minority and woman-owned company with a commitment to diversity. We create innovative technology solutions for nonprofits, foundations, and other social sector organizations that encourage growth, increase efficiency, and emphasize transparency while reducing administrative costs.

Our mission is 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

What distinguishes us?

- We have deep nonprofit expertise in solving an organizations unique challenges
- Our team diversity helps us understand the grant maker, the grant recipient, the stakeholder, and other constituents
- We look beyond our influence (and profit) and focus on the impact of our work and our clients' work

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Candid.



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