



Salesforce Integration

INTRODUCTION

A number of non-profit organizations are looking to leverage the power of Salesforce.com in their day-to-day resource development activities while continuing to rely on Andar/360 for their back-office processing and as their system-of-record. This integration module synchronizes donor information between the Andar/360 CRM and the Salesforce CRM for users who have the Salesforce Nonprofit Success Pack (NPSP.)

QUICK START

Whether you already have Salesforce or you are planning to implement it, this module can very quickly start the data synchronization process between the two systems. Any accounts already in your Salesforce instance will be imported and matched with your Andar accounts using our standard account matching algorithm.

REDUCE DEVELOPMENT COSTS

Implementing Salesforce is easy but ensuring that your donor information is synchronized with your system-of-record can be extremely challenging and expensive. Typically, a team of consultants and developers are required to review your data requirements and build sophisticated integration programs using expensive middleware tools to move data between systems. This is not a one-time job. As new application updates are released, your integration programs typically need to be updated as well.

Questions: Will your team of developers be there two or three years down the road to change your integration software as your business needs change? Bug-free software just does not exist. Even the simplest smartphone apps get updated regularly to fix problems. Will your team of developers be there to support your integration programs? What will be the cost of doing so?

The safe solution: With the Andar Salesforce module, we take care of the updates for you. There is no middleware costs and we ensure that your data integration process continues uninterrupted and risk free. We take care of your software needs while you take care of your community.

REDUCE STORAGE COSTS

Although Salesforce is inexpensive for non-profit organizations, as you build up your database, data storage costs can quickly grow to exceed your budget. With the Andar Salesforce module, you can pick and choose which accounts and what information about each account gets synchronized between systems. This means that your resource development staff gets access to the information they need for the relevant donors while controlling costs.

AUTOMATIC MERGE

As accounts are merged in either system, they are also merged in the other.

SYNCHRONIZATION

With the Andar Salesforce module, Andar maintains a direct connection with Salesforce and monitors both systems for any changes in data and immediately ensures that both systems are synchronized. Andar automatically switches to bulk updates when a large number of updates are required.

EASY ISSUE RESOLUTION

In all synchronization software, some synchronization issues can occur. For example, an address may be valid in one system but not in the other. Different systems often have different validation rules. The Andar Salesforce module will automatically detect these issues and allow for an easy, one-click resolution.

SYNCHRONIZED DATA

The module will synchronize bidirectionally the following information: individual and organization names, other names, addresses, e-mails, telephone numbers, employment relationships, contact relationships, salutations, demographics, techniques, numerical information, and account dates.

The module will also synchronize information unidirectionally from Andar to Salesforce: track parms, leadership summaries, campaign summaries, transactions, and envelope summaries.

The module will also allow the addition of i-Access bio tabs to be embedded into Salesforce contact screens. More data elements will be added as the module development continues.



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