



NOTE:

The Calyx Integration is only available for Calyx Point Central.

Please confirm with your Calyx Administrator which version of Calyx you have before purchasing.

The Calyx/Whiteboard Integration

An office-wide integration that automatically and intelligently syncs your Calyx LOS data to your Whiteboard CRM office, eliminating data re-entry and management across two different systems. The integration allows you to augment your LOS with Whiteboard's automated playbook campaigns. The integration is completely autonomous, hands-off integration that doesn't require any of your time and lets you focus on your business.

Integration Details:

- Utilize your most valuable data points to trigger new outreach opportunities or tasks to better serve your existing client base
- Automatically sync customer data under the appropriate originator
- Updates existing records based on flexible matching rules instead of creating duplicate contacts
- Completely customize the synchronization time interval
- Common "core" datapoints are pre-mapped and ready to go out of the box – making most setups easy to process
- Consistent behaviors – A Calyx integration can be customized to bring over critical datapoints that drive your current business practices or workflows

Pricing:

One-time setup fee of \$500 for your entire office regardless of the number of originators

Monthly integration management fee of \$25 for your entire office

What you need/what to expect:

- An active annual Whiteboard CRM subscription
- An additional active Calyx license/seat for the integration "user" with admin rights. NOTE: If admin rights cannot be granted to the integration user, a non-admin user with read-only permission for all record/data types, as well as, "Save as 1003" and "Export 3.2" options enabled will be needed
- The integration will be 'scoped', the general requirements will be identified during the sales process and defined during the Onboarding process
- Minimum two weeks for set-up and testing

Customization Options:

The integration can be customized to meet specific needs that typical “out of the box” setup doesn’t cover. Integration customization is billed at an hourly rate of \$125. You will receive a detailed quote for your approval prior to committing to the customization of your integration.

Examples of integration customization include, but are not limited to:

- Syncing additional datapoints or custom values from Calyx into Whiteboard CRM
- Creating custom Whiteboard campaigns around synched Calyx data points