

Find out how entitledto products integrate with your internal CRM system.



CRM Integration

Seamless integration between entitledto products and your internal CRM system.

About entitledto

We supply online calculators to over 190 organisations throughout the UK and provide over four million completed calculations each year.

How can entitledto products work for my organisation?

The calculators are web-based and available 24/7, 365 days a year. All you need to access the products is a simple browser on a PC or SmartPhone. There are no downloads or plug-ins required and the calculators have been designed to be intuitive and easy to use.

How does the CRM solution work?

The calculator and your CRM system work independently, using a URN (unique reference number) to perform a keyed lookup on the calculation. If a match is found the existing benefit calculation will be opened, if no match is found a new calculation will be created and opened.

The benefit calculation does not contain any data which can be used to identify the client – the reference ID is the URN. The data which links the URN to an individual is held on the Client's CRM. In order to ensure seamless integration, the login screen which collects the user's username and password will be omitted and the details for the user and associated location will be passed in the querystring used to open the calculator. The benefits calculator will take the user's details from the querystring and assign the calculation to this identity.

In order to secure the calculator, an additional security mechanism needs to be introduced to prevent unauthorised external access. This can be accomplished by using the same URL as your CRM uses to create and edit benefit calculations.

The benefit calculator is secured using a unique key which is changed on a daily basis. Unauthorised access would be rejected if the correct unique key is not supplied.

Security keys supplied using a web service

The security is implemented using a web service on entitledto's server which serves up a new unique key on a daily basis. This would require that the your CRM Technical Team generates a querystring in the existing form.

The web service is secured with a username and password to prevent unauthorised access to the current security key. It would contain one method 'GetCurrentSecurityKey' which would return a string containing the security key in the form of a GUID.

Extraction of statistics by clients

We are able to provide access to the database holding their clients calculation. This is secured by restricting access based on the clients IP address and ensuring the only data available is supplied using read-only views, protected with a username and password.

Why choose entitledto?

We are the trusted, independent and authoritative experts on benefits entitlements. Replace thousands of contact hours with our proven, easy to use self-service online system.