Investia's Open Application Protocol Interface (API) – FAQ

1. **What is an API?**

   An application protocol interface (API) is used to connect an application (e.g., CRM application) to a database (e.g., Univeris).

   Investia's open API is available to connect to CRM applications approved by the iA Security team.

2. **Why would I want to connect my CRM application with Investia's open API?**

   As part of our efforts to promote business process efficiency, Investia's open API will help increase efficiency in running your business while strengthening the security around the data of your clients.

3. **How does Investia's open API work?**

   Investia's open API will seamlessly integrate with your CRM application, utilizing built-in logic using a secure authentication method, which will flow Univeris data related to your Representative code(s) directly into your CRM application.

   Important note: To ensure the data flows into the correct fields from Univeris into your CRM application, your internal IT support or third-party IT support will need to map the data into the fields best suited to your business.

4. **Why do I need a third-party IT team?**

   Given that there is a vast variety of CRM applications being used, Investia is unable to provide expertise on every tool being used.

   If you do not have your own internal IT support or a third-party IT support team, Investia can refer you to a third-party IT support team. If you would like more information about this, please email us at investia@investia.ca and we will provide you with recommendations according to your requirements.

5. **Which CRM applications are approved by the iA Security team to connect to Investia's open API?**

   The following CRM applications are approved by the iA Security team to connect to Investia's open API:
   - Power BI/MS Dynamics
   - Salesforce
   - Equisoft

6. **How do I connect my CRM application with Investia's open API?**

   To request the use of Investia's open API, please send an email outlining your interest to our Client Services Team, by email at investia@investia.ca.

   In the email, **please ensure to include the following information:**
   - Name of the CRM application you are using;
   - Confirm if you have your own IT support team or if you require a reference to a third-party IT support team.