Take note
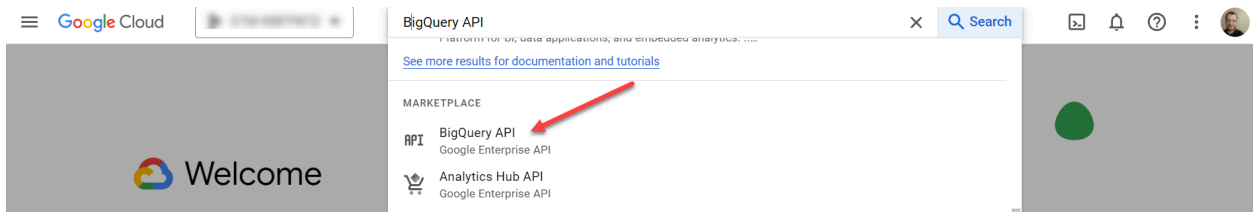
Before you start setting up the script for the Connector Owox for Creatio application, make sure the following:

- you have configured Owox BI flows;
- transformations have been created for the session table;
- transformations have been created for the table on advertising costs

BigQueryAPI

1. Enable BigQueryAPI in your GCP project.
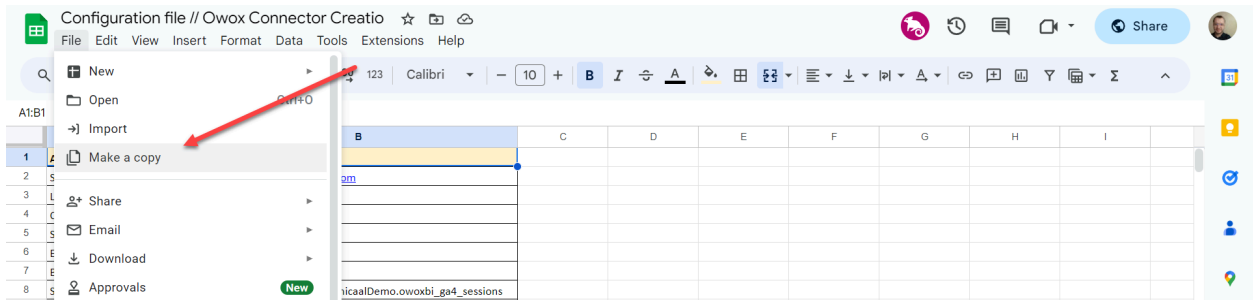
To do this, follow the link or go to the GCP console and type "BigQuery API" in the search bar. Then click on "BigQuery API".

If the BigQuery API has been enabled in your project, you will see the message "API Enabled". To activate the API if you do not see this message, please click the "Enable" button.

Config File Settings

1. Sign in to your Google account that has access to the following Owox BI tables: owoxbi_ga4_sessions and BlendedAdSpend.
   The account needs to have at least the BigQuery Job User and BigQuery Data Editor access levels.
2. Copy the file. This file is used to make all the settings for the Owox Connector for Creatio.

3. Provide the following information in this file:

   3.1. **Site Creatio** - The URL of your Creatio website

   Please note that the website address should not end with a "/". For example https://***.creatio.com

   3.2. **Identity Service** - URL for Identity Service

   Identity Service implements the OAuth 2.0 protocol to securely authorize applications that integrate with Creatio. The method for configuring Identity Service depends on how you deploy your Creatio site (cloud or on-site):

   - **for Creatio cloud:** to configure Identity Service, contact Creatio support.
   - **for Creatio on-site:** to configure Identity Service, follow the instructions in the Creatio academy article

   3.3. **Client_id** - client id to securely authorize the application using the OAuth 2.0 protocol.

   3.4. **Client_secret** - client secret to securely authorize the application using the OAuth 2.0 protocol.

   To get the client_id and client_secret values, you will need to configure OAuth 2.0 authorization. To do this, use the instructions from Creatio Academy

   3.5. **Grant_type** - the value is already specified in the configuration file - client_credentials

   3.6. **Start date -** do not make any changes to this field. The value is calculated based on the formula $=\text{TEXT}(\text{TODAY}()-B12, \text{"YYYYY-MM-DD"})$. Where $\text{TODAY}()$ is the current date and B12 is the value of the expense update window.

   This value indicates the date from which advertising cost information is updated in Creatio

   The file below also describes in more detail the purposes for which the expense update window is intended (Value from cell B12).
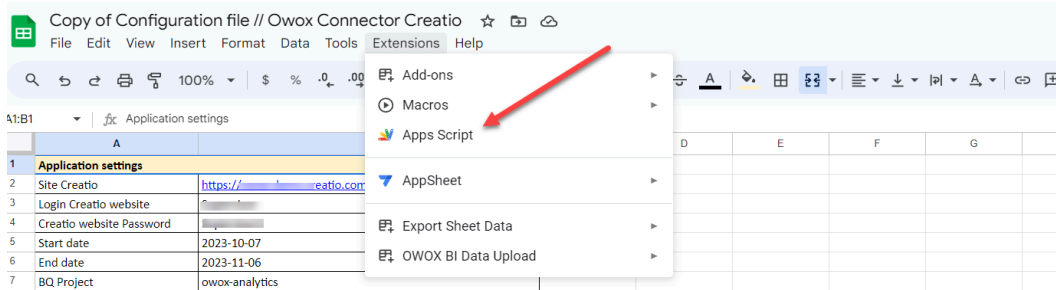
3.7. **End date -** do not make any changes to this field. The value is calculated based on the formula $=TEXT(TODAY()-1, "YYYYY-MM-DD")$. Where $TEXT(TODAY()-1$ is the date of the previous day.

This value indicates the date up to which information about advertising costs will be updated in Creatio. By default, this date is yesterday's date.

3.8. **BQ Project -** project id GCP

3.9. **Streaming Session table -** Table ID of your OWOX BI [session table](#)

3.10. **Blended AdSpend table -** Table ID of your [cost data table](#)

3.11. **Do you use Creatio Digital Ads? -** has the value TRUE. It is **not recommended** to change this value.

By default, our application uses "[Creatio Digital Ads](#)" data for Facebook and Google advertising accounts and supplements it with expenses from the Owox [BlendedAdSpend](#) table for all other advertising accounts.

Therefore, if you already have the Digital Ads application installed on your site and the value for "Do you use Creatio Digital Ads" in the configuration file is set to FALSE, the costs for Facebook and Google advertising accounts will be loaded twice - the first time from Digital Ads and again from the Owox BlendedAdSpend table.

If your Creatio site is not using Digital Ads, please contact OWOX technical support. We can help you configure the Owox For Creatio Connector.

3.12. **Window update leads -** the period for which UTM information for Creatio leads is updated from the owoxbi_ga4_sessions table.

The recommended value is 2. The value "2" is set in order to level out possible time differences between BQ, Creatio and this script. By specifying this value, we update the UTM's of Leads every day not one day ago, but two days ago.

3.13. **Window update cost info -** window for updating costs from advertising accounts.

This parameter is important because advertising costs calculated by advertising offices can be adjusted over time. For example, advertising services can update statistics to exclude bot activity or false clicks. To keep information about your advertising costs as accurate as possible, it is necessary to periodically update this data.
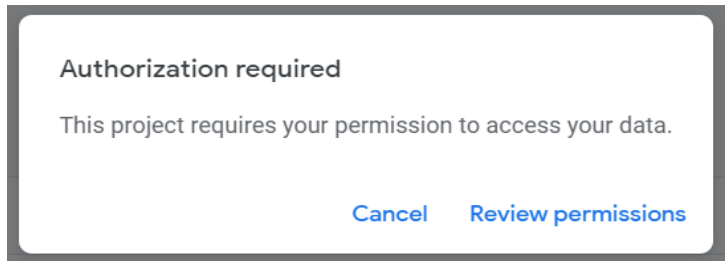
Recommended value - 31

Providing the script with the necessary accesses

Grant the configuration file access to the data. To do this, follow these steps:
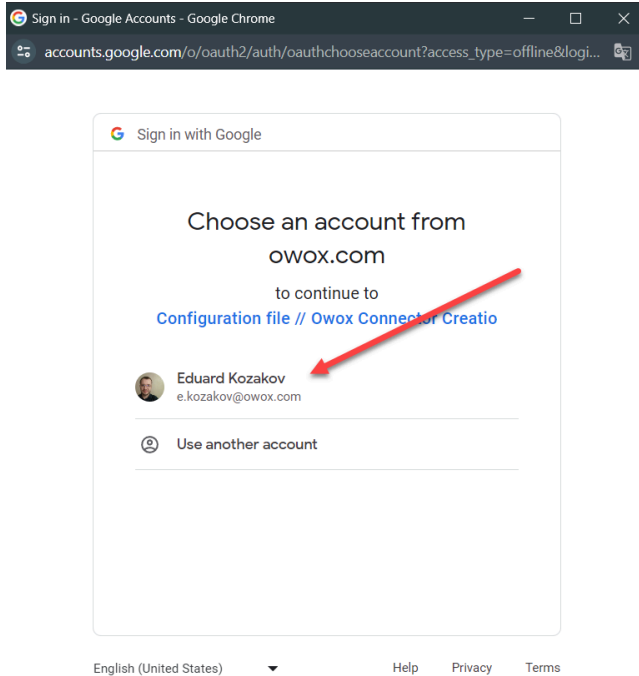
1. Go to "Extensions" - "App Script"

2. On the toolbar, click on "Run" (▷ Run). Since this is your first time running the script, you will need additional authorization:

3. Click on "Review permissions". Select your account:

4. In the next menu, click on "Advanced", then Go to "Configuration file // Owox Connector Creatio (unsafe)"
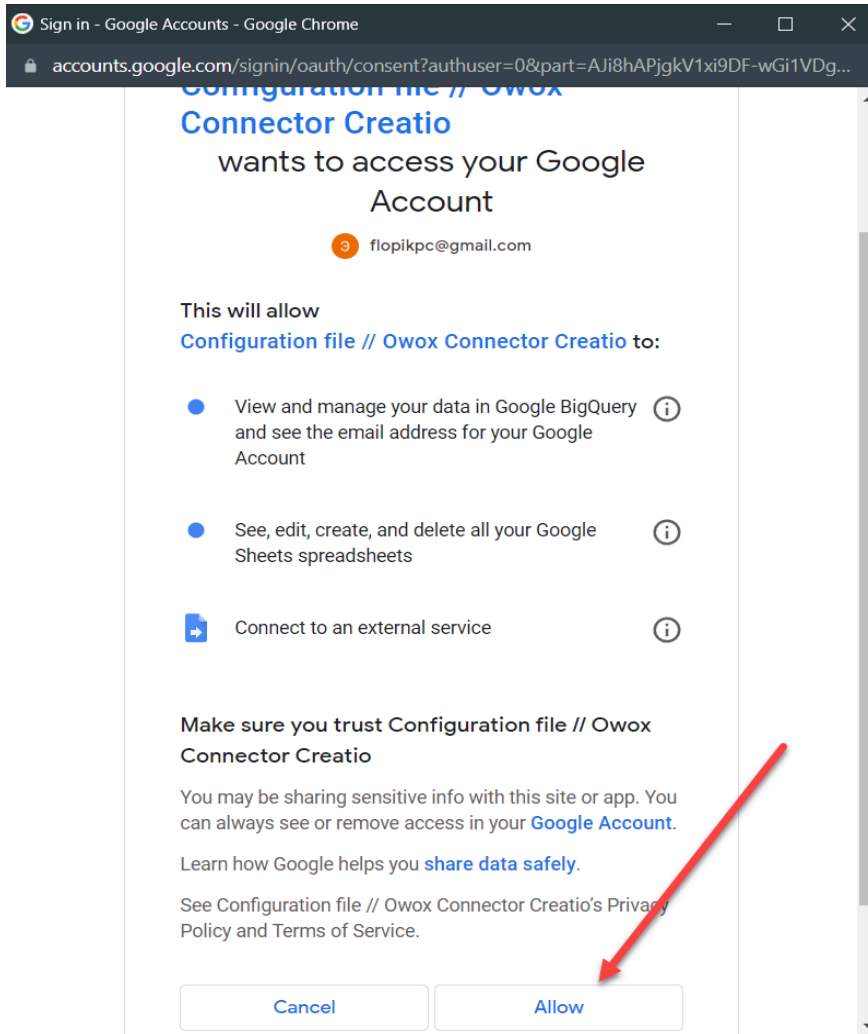

5. On the next page you will be informed what access you are granting for this script. The access levels are as follows:

   5.1. **View and manage your data in Google BigQuery and see the email address for your Google Account** - required to get data from the owoxbi_ga4_sessions and BlendedAdSpend tables. Subsequently, the script sends the aggregated data from these two tables to your Creatio

   5.2. **See, edit, create, and delete all your Google Sheets spreadsheets** - required so that the script can get settings (Site Creatio, Login Creatio website, Streaming Session table, etc.) from the current configuration file

5.3. **Connect to an external service -** required for the script to have access to external services. Such a service in this script is BigQuery API, which allows you to obtain data from BQ tables
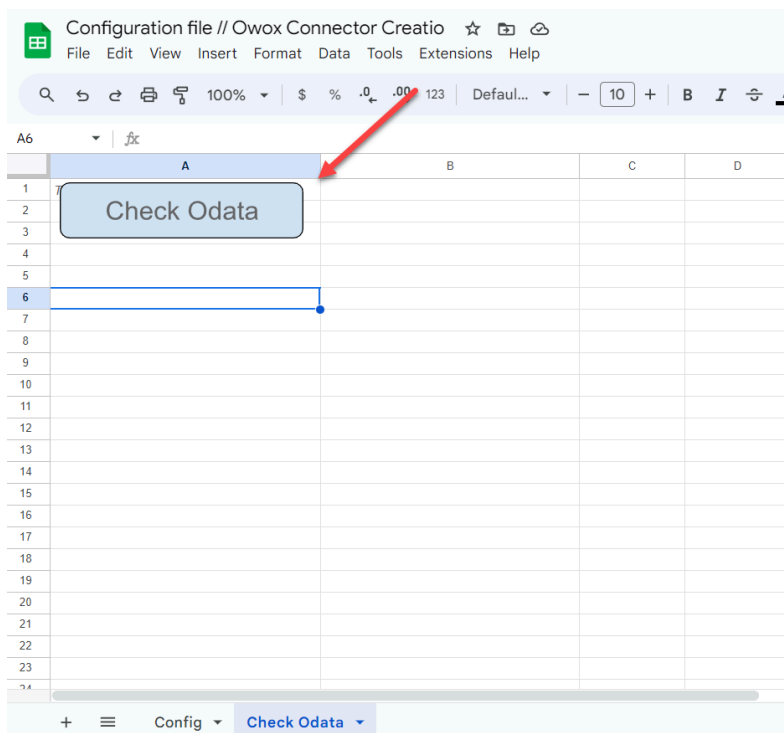

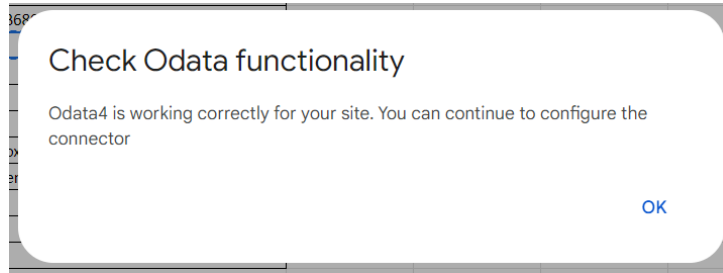6. Congratulations, now this script has all the necessary access for subsequent work

Check Odata functionality (optional)

The 'OWOX connector for Creatio' application utilises the Odata4 protocol to transfer data to your Creatio website. It is crucial to ensure that Odata is correctly compiled on your site to avoid errors when accessing Creatio objects. To verify if Odata is functioning correctly, follow these steps:

1. Open the file created in 'Config file settings'
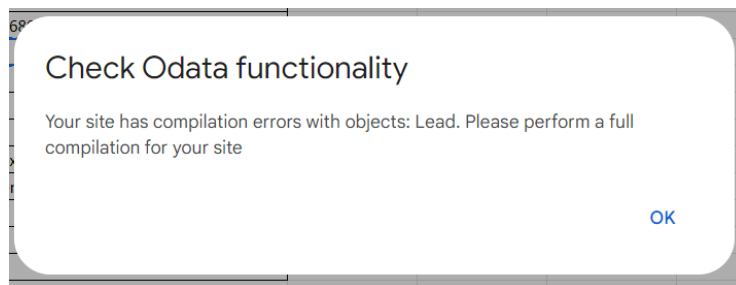2. Go to the 'Check Odata' sheet, then click on the 'Check Odata' button.

3. Please wait a few seconds while the script verifies that Odata is functioning correctly on your site.

   3.1. If a window appears with the text '*Odata4 is working correctly for your site. You can continue to configure the connector*', then Odata is functioning correctly. Below is an example screenshot of such a pop-up window

You may proceed to the next section titled 'Running a script on a schedule'.

3.2.   If the pop-up window displays the message 'Your site has compilation errors with objects:...', it indicates that Odata is not functioning properly on your site. The screenshot below shows an example of such a pop-up window:
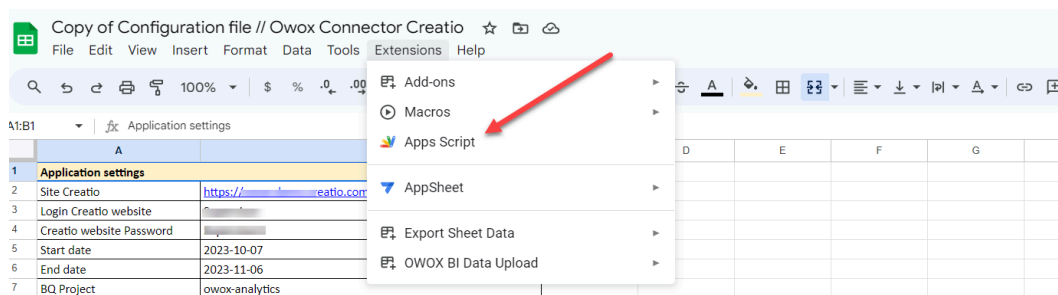

To resolve this error, compile your Workspace. To do this, navigate to 'Advanced Settings' in the settings, then click on 'Compile' and select 'Compile all'.

4.   Repeat step 2 of this section now. Ensure that the test is successful.
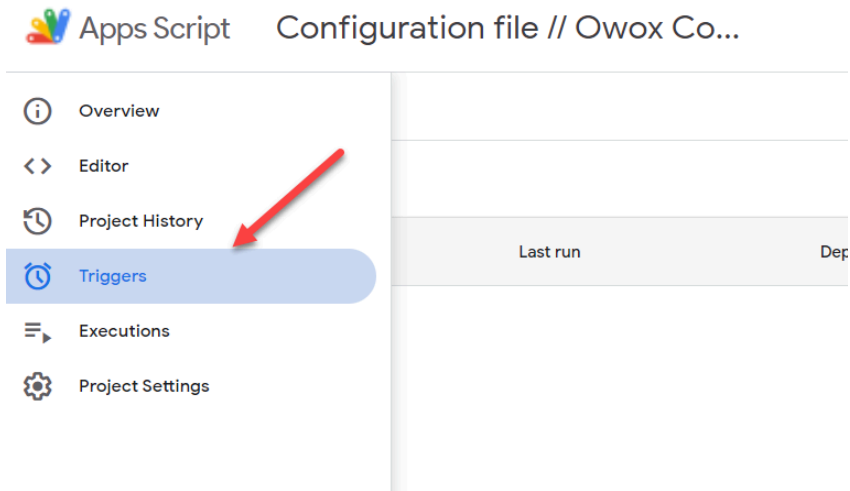
Running a script on a schedule

To ensure automatic updates of data from BigQuery tables in Creatio, the script should be configured to run on a daily basis. Follow these steps to accomplish this:

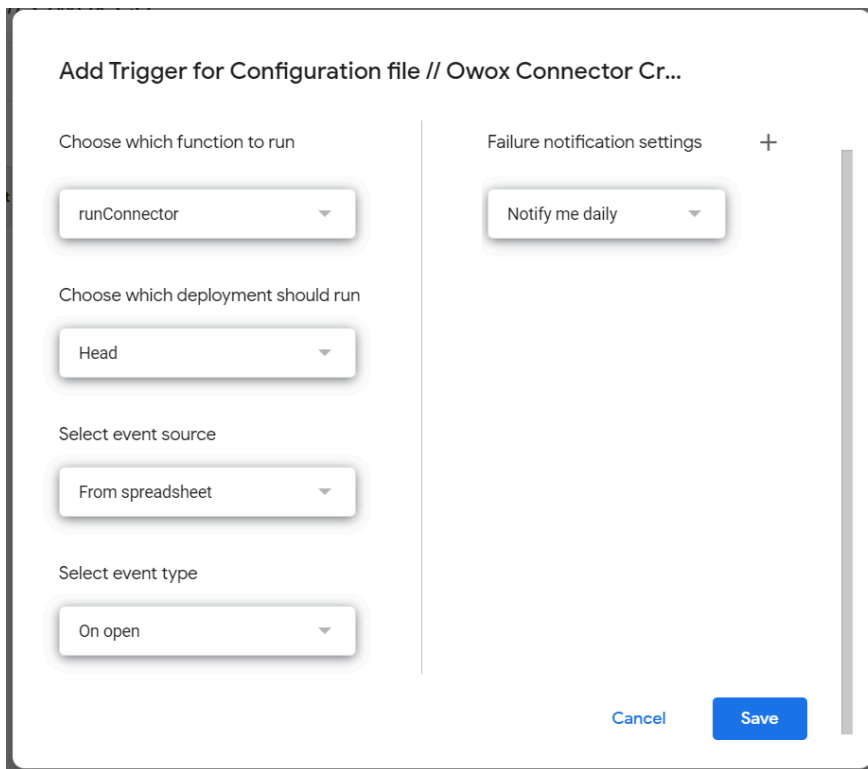1.   Go to "Extensions" - "App Script".

2. Select "Triggers" from the left-hand menu

3. In the new window, click on the "Add Trigger" button

4. You will see the following new window:

5. Explanations for each of the values are given below:

5.1. Choose which function to run - a function to be run by a trigger.
Only one value, **"runConnector"**, will be available.

5.2. Choose which deployment should run - version of the deployment that needs to be performed

Only one value, "**Head**", will be available.

5.3. Select event source - event for script launch.

Change the value to "**Time-driven**".

5.4. Select type of time based trigger - how often do you need to run this script?

Change the value to "Day timer".

5.5. Select time of day - time when the script needs to be run

Specify the time following the time specified in the Owox BI transformation for sessionalisation.

5.6. Failure notification settings - Please provide instructions on how often to receive notifications about script failures.

This parameter is not critical and does not affect the operation of the script itself.

Set to "Notify me dayli"

6. 🎉 Congratulations, you have successfully configured a script that automates the data upload process from OWOX BI BQ tables to your Creatio website.