



CONFERO

USER MANUAL

 **LURSOFT[®] Connector**

Automated data from Lursoft

Version 1.0 Freedom UI

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Introduction

Lursoft Connector is a native add-on that enables the automatic retrieval of official company data from Lursoft through seamless integration between Creatio and Lursoft.

Lursoft Connector allows the user to keep all information about customers - companies, partners, subcontractors, or suppliers - with whom interactions are planned or ongoing in one centralised location. All data is kept up to date and accessible at all times for maximum convenience and reliability.

After establishing the connection to Lursoft, a **Get data from Lursoft** button appears in the **Accounts section**, enabling the user to retrieve all necessary company data directly from Lursoft. The Accounts section allows the user to maintain a register of contact details, track interconnections between companies, segment them according to various parameters, and analyse statistics.

The integration with Lursoft enables:

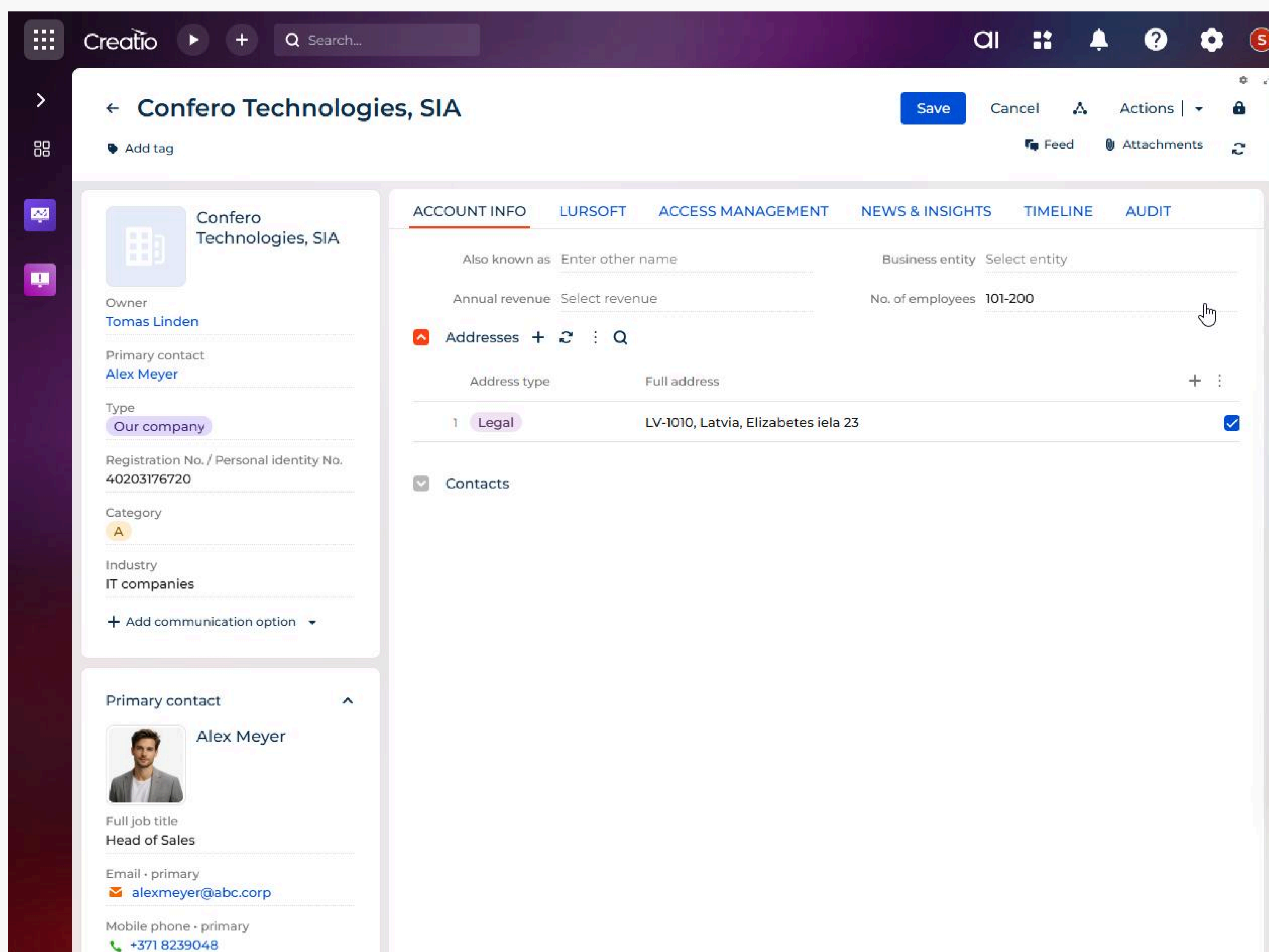
- Requesting official company data from Lursoft without leaving Creatio.
- Simplifying the creation of new records (only the registration code is required).
- Automatically populating account details with verified legal information.
- Maintaining consistent and accurate records by validating data against the Lursoft registry.
- Monitoring changes in company information and instantly notifying users about updates.

Detailed instructions for creating a **Creatio Person** record and populating data from the Lursoft database are provided in this **user manual**.

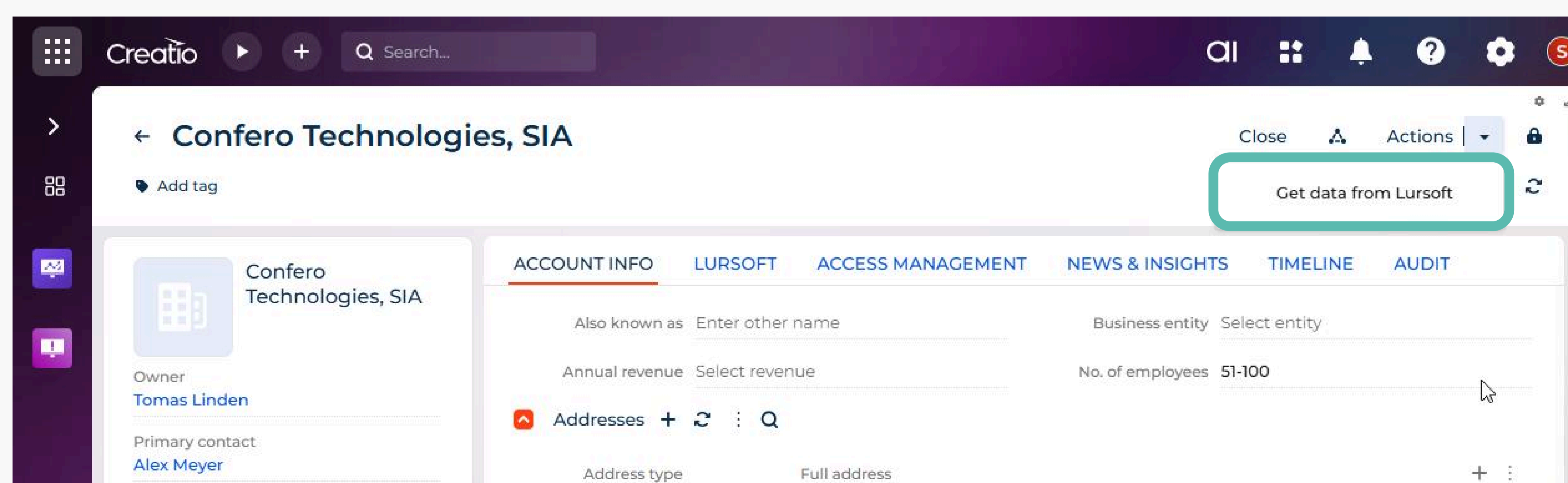
Filling In a Person From Lursoft

To create a new person, you only need to know the registration number, even the name can be made up as it will be updated.

1. Fill in the required fields on the page and save the person card.



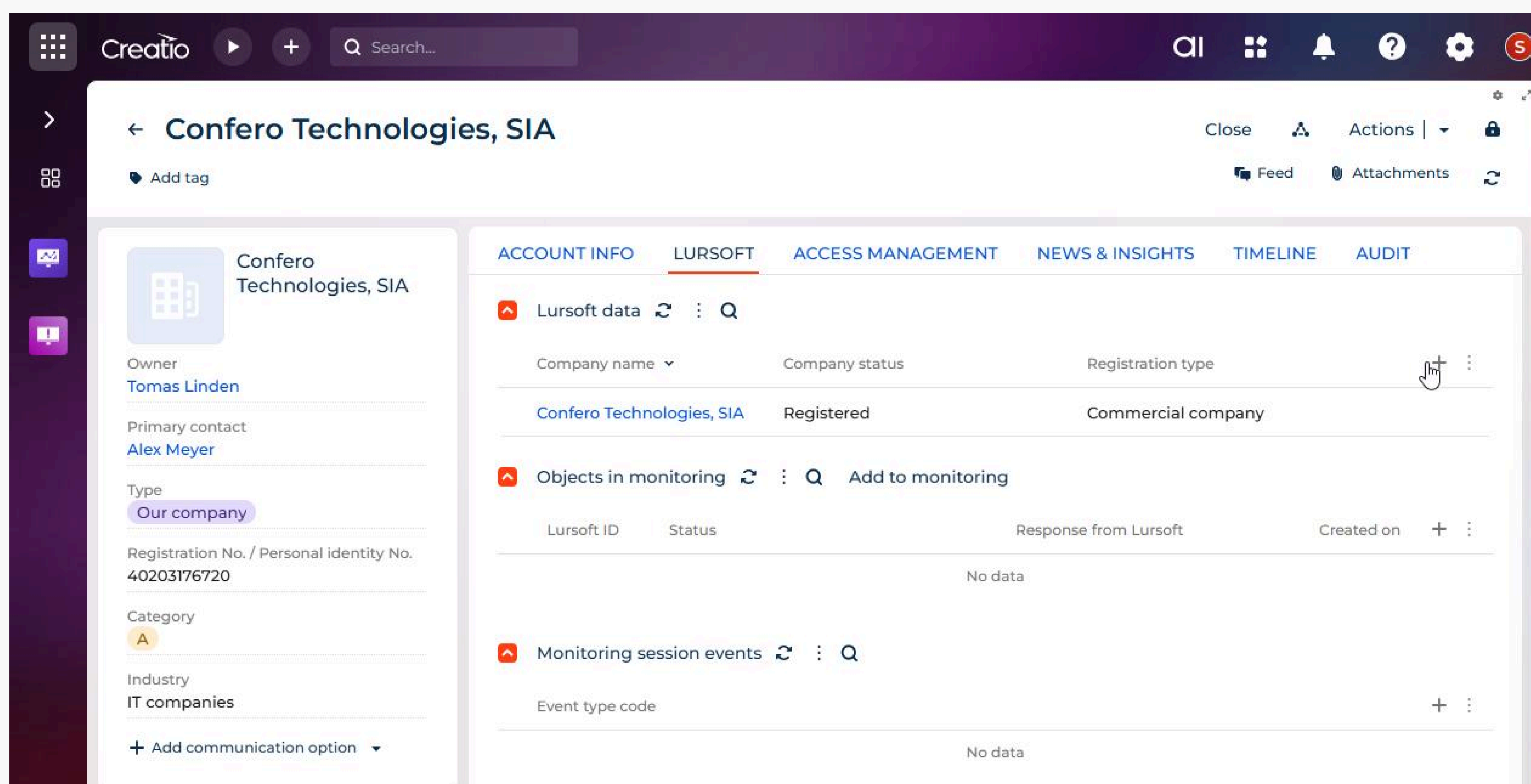
2. After saving the card, select ACTIONS / Get data from Lursoft.



3. The system will automatically process all fields in the identity card from Lursoft data.

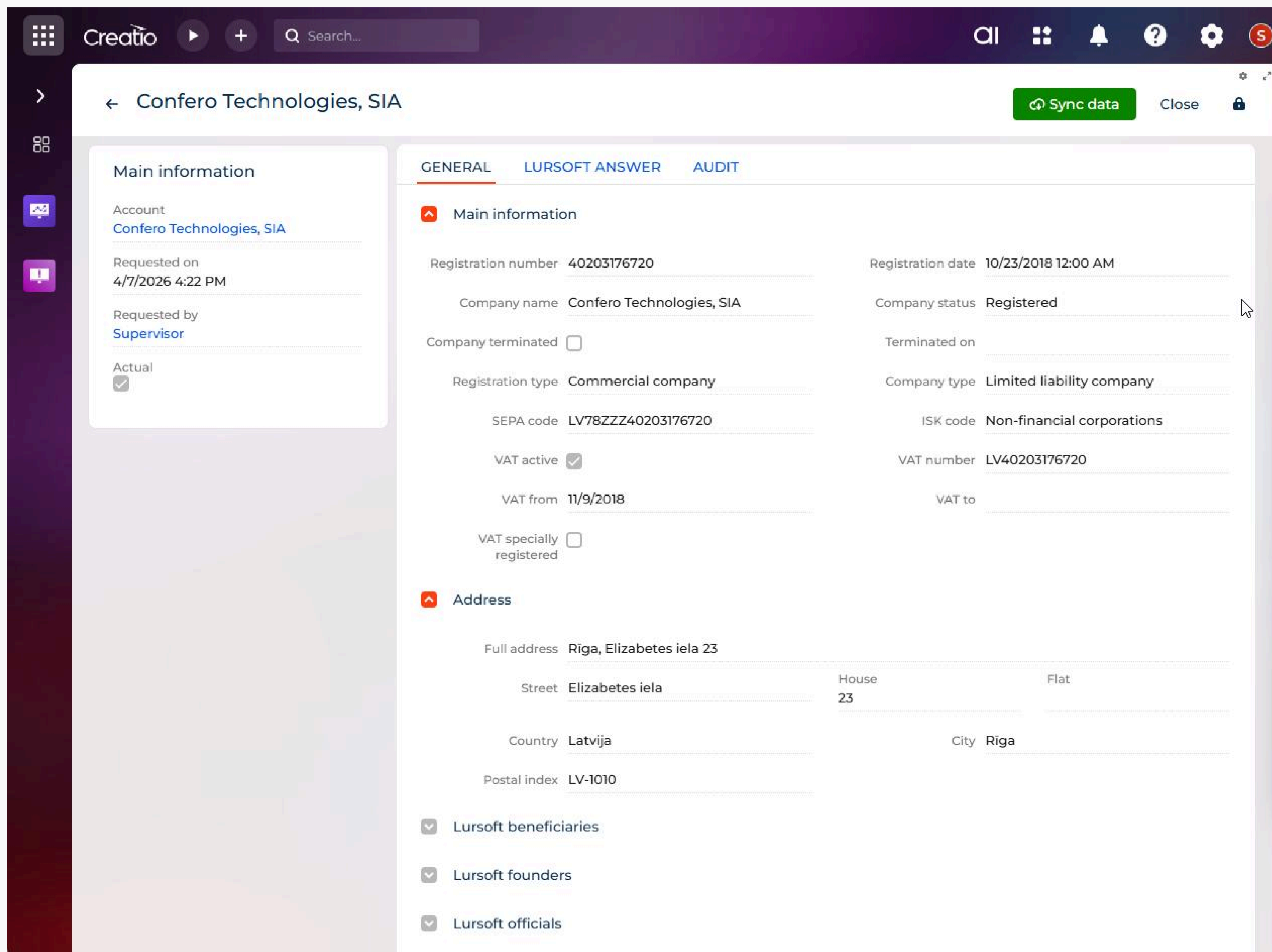


4. The Information checked field will also be updated.



5. All data received from Lursoft is also available in the personal card under the LEGAL INFORMATION tab / Lursoft data detail

6. The system will automatically process all fields in the identity card from Lursoft data.



The list of fields is described below:

Profile Fields

Field	Description
Requested on	Date and time Filled in automatically when requested Not editable
Requested by	Value from table Employee Filled in automatically when requested Not editable
Account	Value from Legal entity Filled in automatically when requested Not editable
Button SYNC DATA	If no autofill is provided, it is possible to check the data and update manually

Tab GENERAL

Field	Description
Registration number	Registration number Filled in automatically when requested Not editable
Registration date	Registration date Filled in automatically when requested Not editable
Company name	Company name Filled in automatically when requested Not editable
Company status	Company status Filled in automatically when requested Not editable
Company terminated	Filled in automatically when requested Not editable
Terminated on	Date and time Filled in automatically when requested Not editable
Registration type	Registration type Filled in automatically when requested Not editable
Company type	Company type Filled in automatically when requested Not editable
SEPA code	SEPA code Filled in automatically when requested Not editable
ISK code	ISK code Filled in automatically when requested Not editable
VAT active	VAT active Filled in automatically when requested Not editable
VAT number	VAT number Filled in automatically when requested Not editable
VAT from	Date Filled in automatically when requested Not editable
VAT to	Date Filled in automatically when requested Not editable
VAT specially registered	VAT specially registered Filled in automatically when requested Not editable

Tab GENERAL

Field	Description
Address	Detail Address Filled in automatically when requested Not editable
Beneficiaries	Detail Beneficiaries Filled in automatically when requested Not editable
Founders	Detail Founders Filled in automatically when requested Not editable
Officials	Detail Officials Filled in automatically when requested Not editable
Procurations	Detail Procurations Filled in automatically when requested Not editable

Tab LURSOFT ANSWER

Field	Description
Lursoft Answer	The tab displays Lursoft answer in JSON format

Please note! Import from detail Lursoft data to Customer card fields will only happen if field mapping is configured.

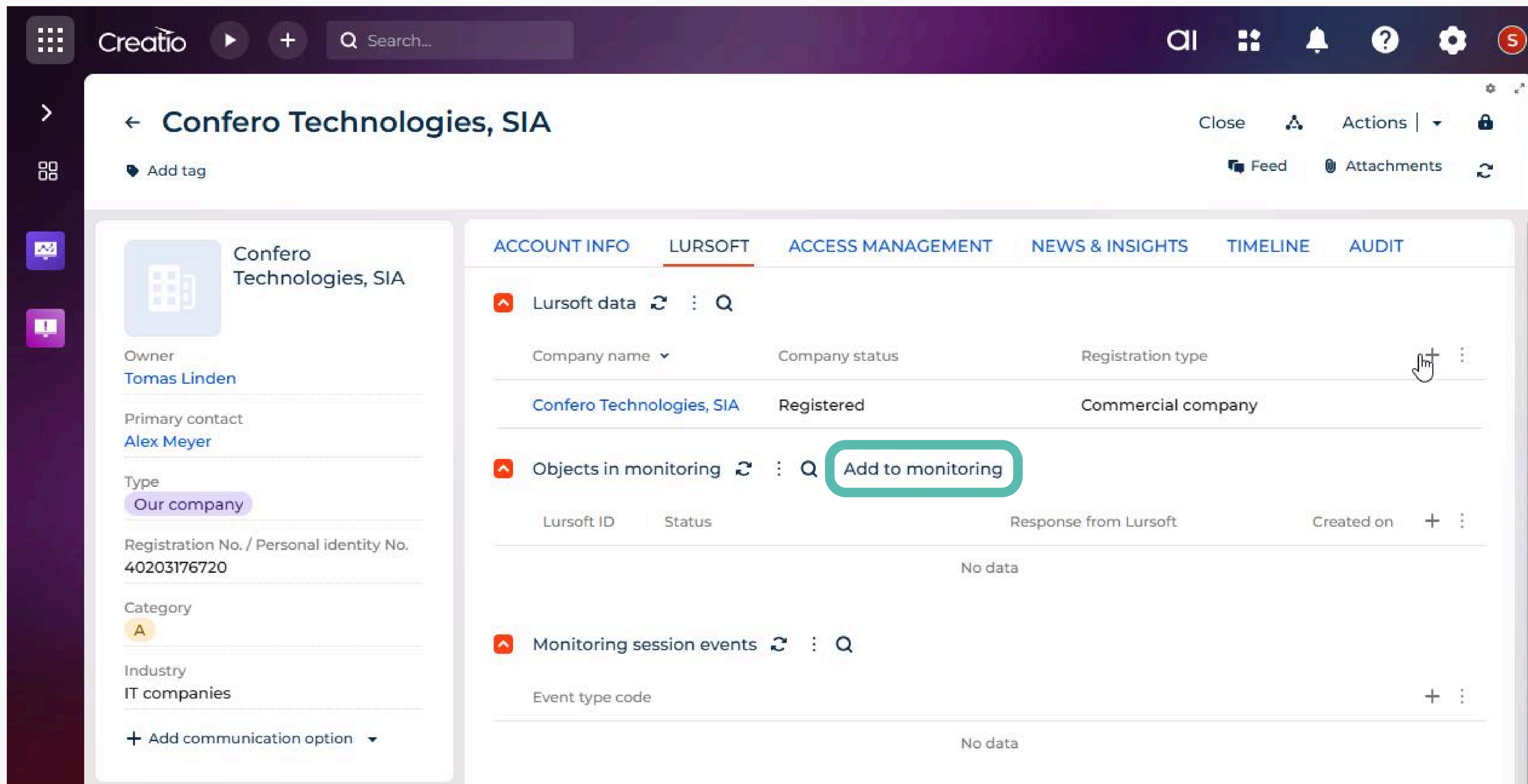
IMPORTANT! Automated data from Lursoft provides a setting to update the Lursoft data from the form instantly automatically on all pages of the form.

If no autofill is provided, it is possible to check the data and update manually by clicking on the button

 Sync data

Lursoft Monitoring

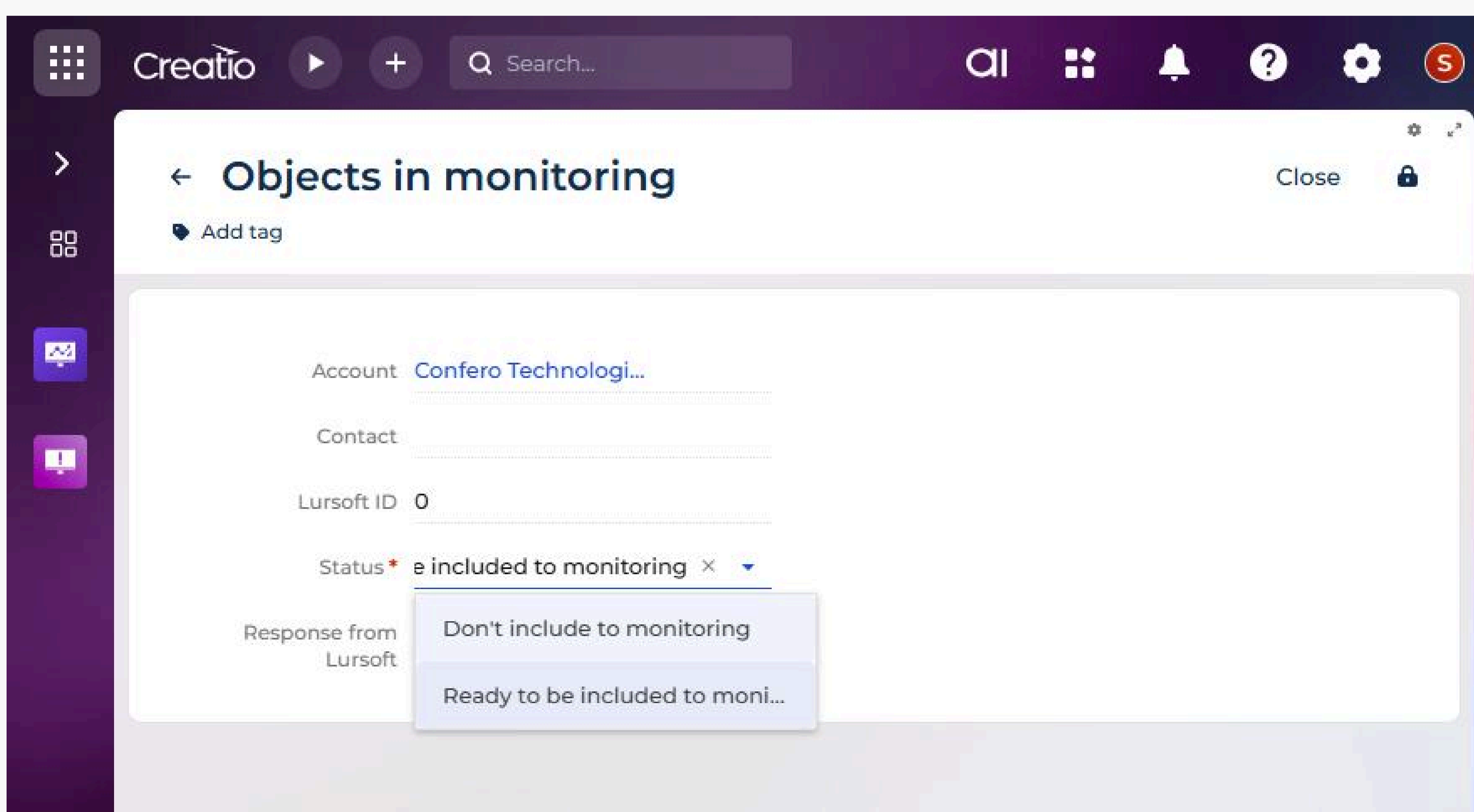
1. To add a person to the monitoring list, you need to click the **Add to monitoring** button on the person's card in the LURSOFT tab in the Monitoring detail.



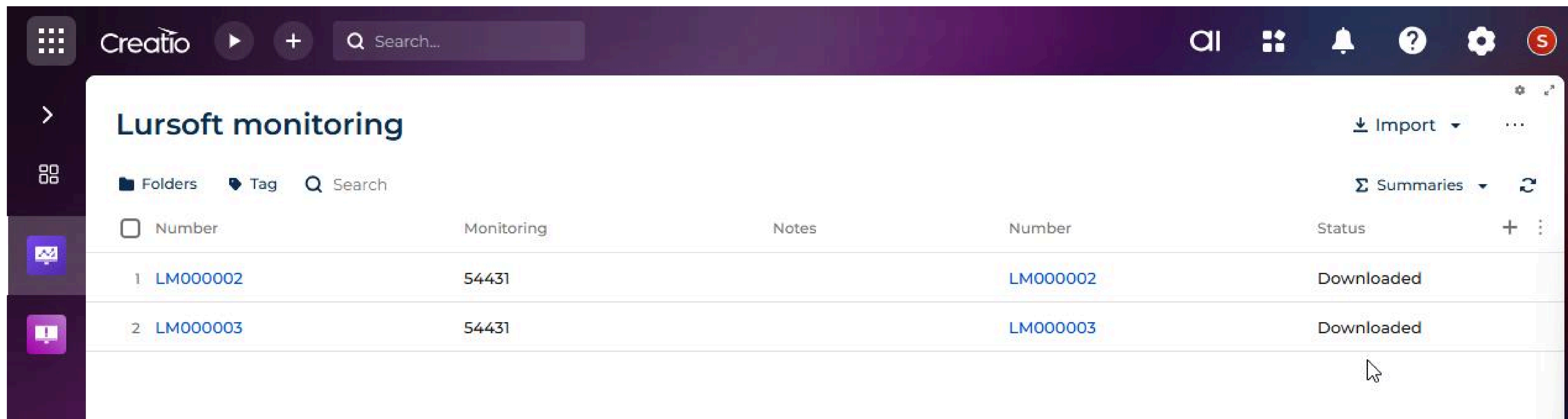
The monitoring status will be changed to **Ready to be included to monitoring**.

At the end of the day, all companies added to the monitoring will be added to the Lursoft monitoring list.

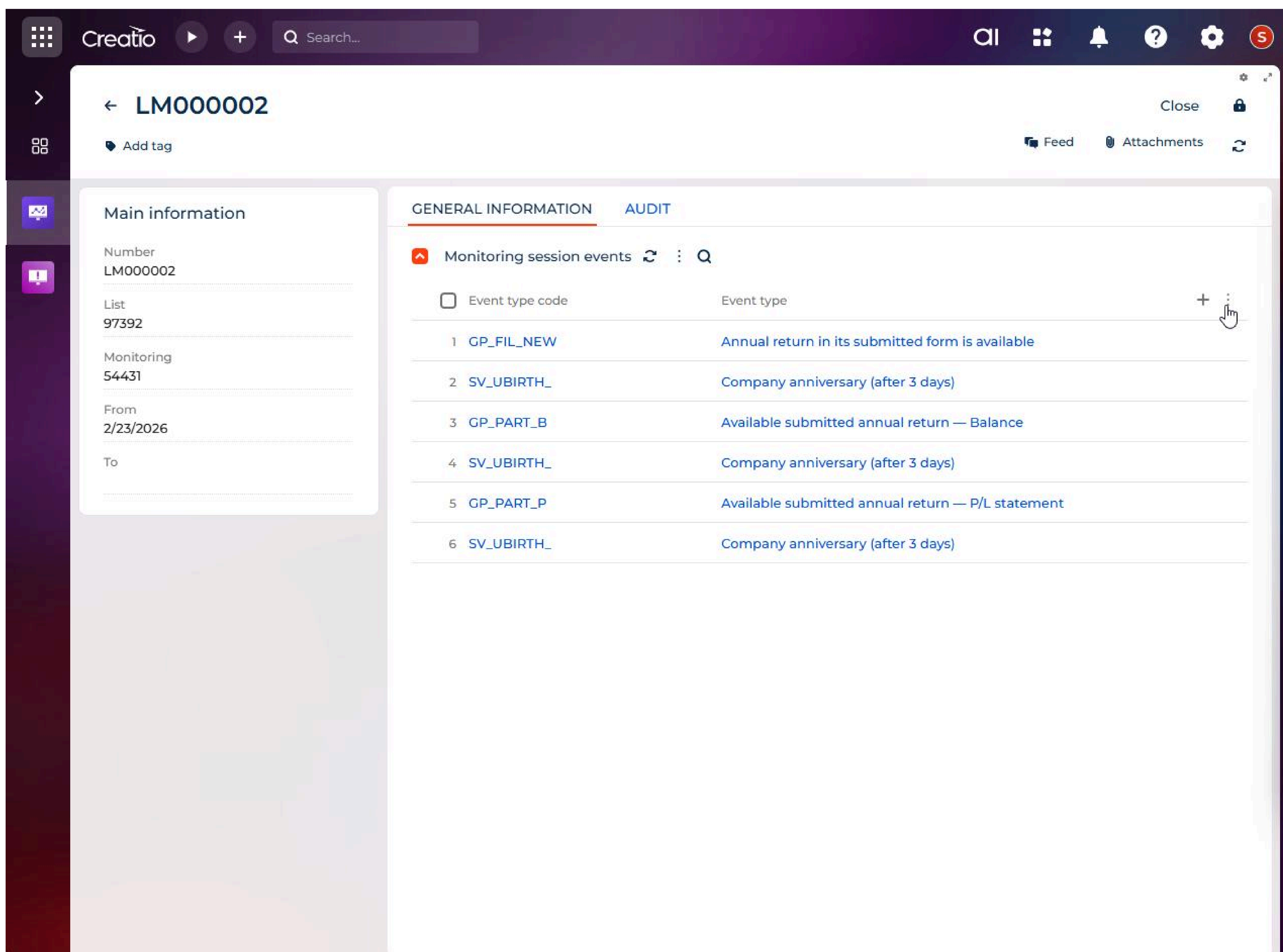
2. If a person was added to the monitoring list by mistake, the status can be changed to **Don't include to monitoring**.



Lursoft Monitoring section is designed to make it easier and faster to keep track of changes that have taken place in the Lursoft portal.



Lursoft Monitoring form contains a set of fields and details:



The list of fields is described on the next page

General Fields

Field	Description
Number	Full document number Formed automatically by the system according to the mask when first saved Not editable
List	Filled in automatically when creating a request Not editable
Monitoring	Filled in automatically when creating a request Not editable
From	Date from Filled in automatically when creating a request Not editable
To	Date to Filled in automatically when creating a request Not editable

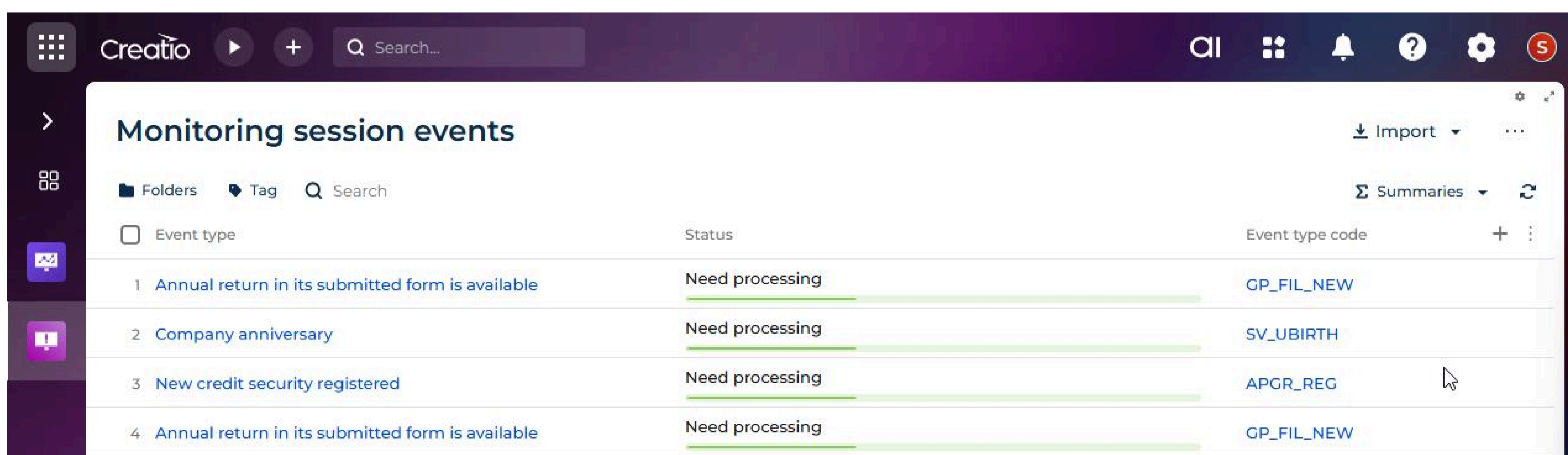
Tab GENERAL

Field	Description
Monitoring session events	Detail Monitoring session events (detailed in section Monitoring session events)

Monitoring Session Events

Monitoring session events section is designed to make it easier and faster to keep track of changes that have taken place in the Lursoft portal.

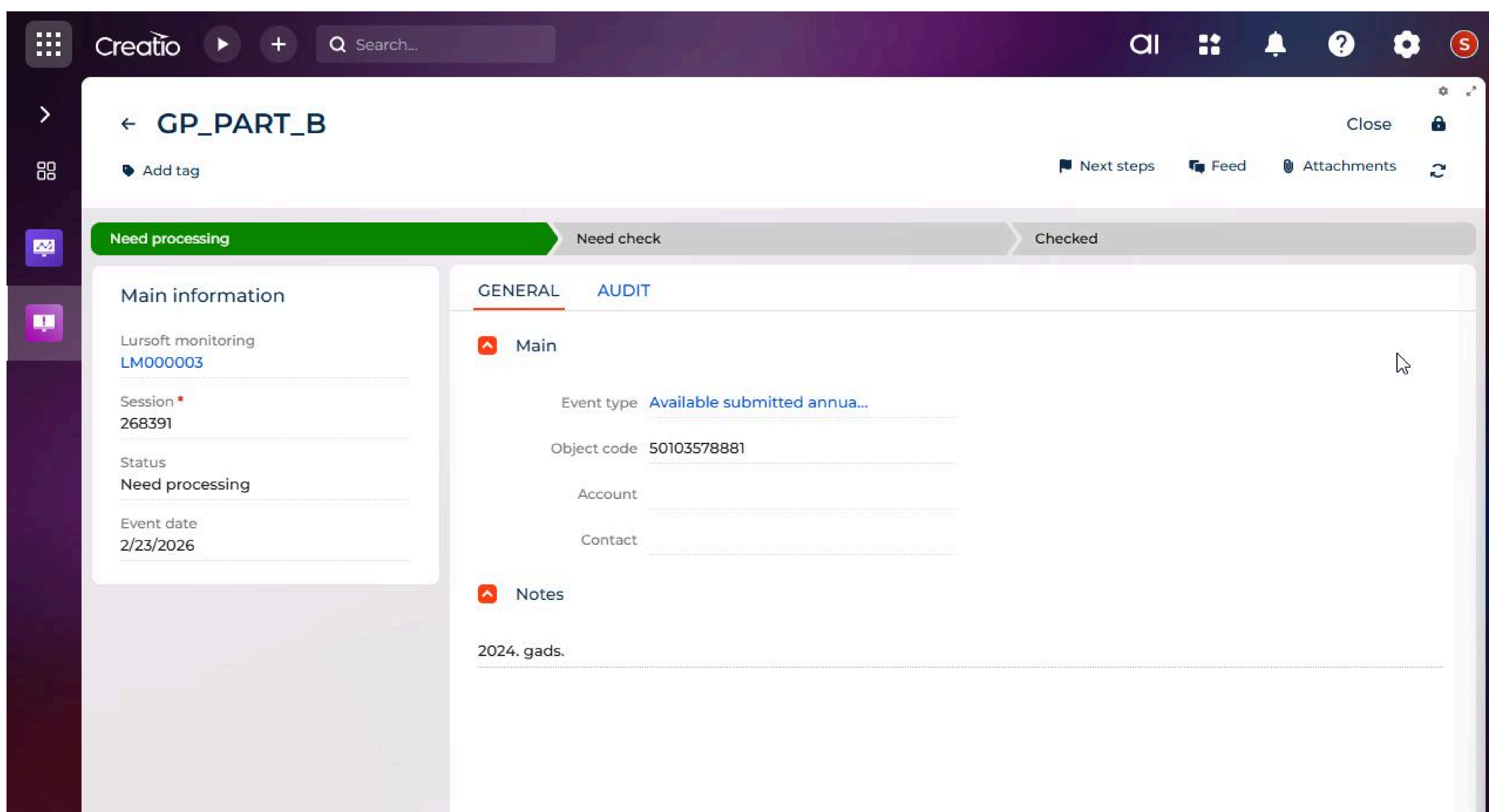
All changes are automatically registered as an Event in the Monitoring session events section.



The screenshot shows a table with the following columns: Event type, Status, and Event type code. The table contains four rows of data:

Event type	Status	Event type code
1 Annual return in its submitted form is available	Need processing	GP_FIL_NEW
2 Company anniversary	Need processing	SV_UBIRTH
3 New credit security registered	Need processing	APGR_REG
4 Annual return in its submitted form is available	Need processing	GP_FIL_NEW

Lursoft Monitoring Events form contains a set of fields and details:



The screenshot shows the 'GP_PART_B' monitoring event form. The form is divided into two main sections: 'Main information' and 'GENERAL' (with 'AUDIT' also visible). The 'Main information' section includes fields for 'Lursoft monitoring' (LM000003), 'Session' (268391), 'Status' (Need processing), and 'Event date' (2/23/2026). The 'GENERAL' section includes fields for 'Main' (Event type: Available submitted annua..., Object code: 50103578881, Account, Contact) and 'Notes' (2024. gads.).

The list of fields is described below:

Profile Fields

Field	Description
Lursoft monitoring	Full document number Formed automatically by the system according to the mask when first saved Not editable
Session	Filled in automatically when creating a request Not editable
Status	Status Filled in automatically when creating a request Not editable Can change status by DCM at status bar line
From	Date from Filled in automatically when creating a request Not editable

General Fields

Field	Description
Event type	Filled in automatically when creating a request Not editable
Object code	Filled in automatically when creating a request Not editable
Person	Filled in automatically when creating a request Not editable
Information panel	Filled in automatically when creating a request Not editable

Tab ATTACHMENTS

Field	Description
Notes	Add a new comment using the button User, date and time are fixed

Tab AUDIT

Field	Description
Created by	Value from table Employee Author of the entry Generated by the system automatically upon initially saving the document Read only

Tab AUDIT

Field	Description
Created on	Date and time of creation Generated by the system automatically upon initially saving the document Read only
Modified by	Value from table Employee Last person who modified the entry Generated by the system automatically each time upon saving the document Read only
Modified on	Date and time the entry was last modified Generated by the system automatically each time upon saving the document Read only

This section records all events in full. Several types of responses can be applied to events received from Lursoft:

Event registration.

An event is registered each time it is received. If the event is complex and it is not possible to set a technical response (e.g. start of the liquidation process), it shall be registered with the status **Need check**. After the responsible officer has reviewed the event, taken a decision and changed the person, the status can be changed to **Checked**.

Field value updates.

Field values can be updated automatically based on an event. For example, when the event **Company dissolved** is received, the value of the **Status** field in the **Account** section is automatically changed to **Blocked**. Such event will be recorded with the status **Need processing**. After the responsible employee has reviewed the change, the status should be changed to **Checked**. In the event map you can find which fields have been changed.

Personal data updates via Data API.

It is possible to call the **Data API** and automatically update personal data based on the event, for example when the legal address changes. Such events are recorded with the status **Need processing**. After the responsible employee reviews the update, the status should be changed to **Checked**. A note can be found on the event card that this event has triggered an API call.

Creation of predefined activities.

Predefined activities can also be created after event registration. In this case, a new activity record is created in the **Activity** section. After all related activities are completed, the status will be changed to **Checked**.



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