

Symitar connector for Creatio Guide

Symitar connector is using the API SymXchange 2022.01 Account endpoint. The user needs to enable in Quest the methods:

`getAccountSelectFields`

`getName`

`getCardName`

Note: the administrator password needs to be active since is the one used for the integration

<input type="checkbox"/> Account Number:	Yes
<input type="checkbox"/> Home Banking:	No
<input type="checkbox"/> Card:	No
<input type="checkbox"/> MICR:	No
<input type="checkbox"/> Lookup:	Yes
<input type="checkbox"/> User Number:	No
<input type="checkbox"/> Admin Password:	No
<input type="checkbox"/> Allow No End-User Validation:	No

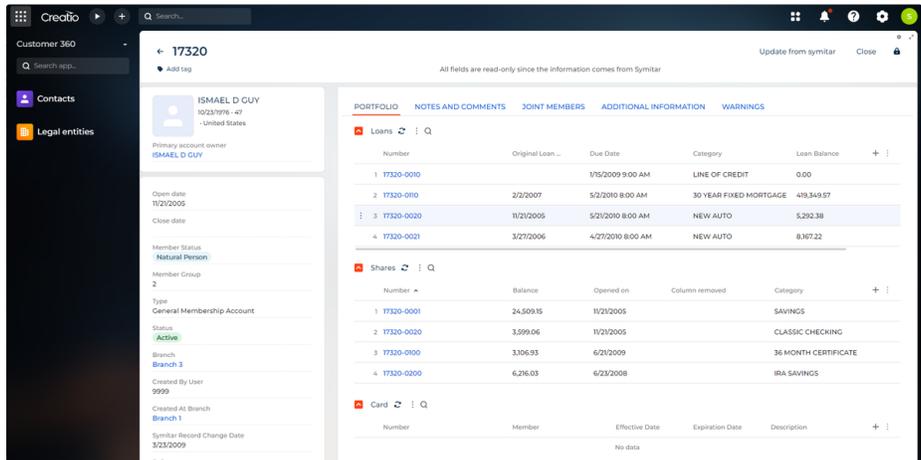
To set up the connector you must fill in the system settings:

Name	Code	Description
SymXchange URL	SymXchangeURL	URL to the API endpoint: Ex http://10.10.10.10:8687/SymXchange/202.01/account
SymXchangePassword	SymXchangePassword	Admin credentials provided by Symitar
SymXchange DeviceNumber	SymXchangeDeviceNumber	Device Number provided by Symitar
SymXchange DeviceType	SymXchangeDeviceType	Device Type provided by Symitar
Symitar Start Migrate Account Number	SMSymStartMigrateAccountNumber	If you are unable to import your Symitar account to Creatio, you can set this setting to the last known account number. The connector will attempt to load the new account once per five minute.

After configuring the system settings, you can import all account numbers to the section (Symitar Accounts) and open one account to trigger the synchronization. You will see in the process log running (CU - Get Account from Symitar).

The connector will import the information related to the account, Joint members, Comments, Notes, Cards, Shares, and Loans (Financial Accounts).

If you want to update from the page the information, you can use the button (Update from Symitar)



Symitar account page

Configuring Symitar

To use Symitar connector for Creatio administrator on Symitar side should allow access to SymXchange endpoint and provide login and password for this endpoint. These settings should be used while setting up Creatio.

Also, to use a process that automatically gets updated data from Symitar to Creatio, administrators need to configure standard PowerOn script functionality and add the special script provided by Solution Matrix.

Synchronization triggers

Synchronization starts with various triggers:

Name	Trigger	Description
Search for new Account	every 5 min	Every 5 minutes process "CU - Find New accounts on Symitar" starts and tries to find new accounts in Symitar
Update Symitar information on Symitar Account page open	1. On Symitar page open. 2. By click on button "Update from symitar" on Symitar Account page.	By this events connector makes requests to Symitar and load information for opened Symitar Account row and referenced objects.
Search for updated information in Symitar and load it to Creatio	every 30 min	Every 30 minutes process "CU - Update accounts from symitar" makes request to Symitar and checks list of modified rows

Initial import

After installing and configuring the connector, you need to perform a migration of Symitar Accounts from Symitar to Creatio. To perform this task you can use standard import from Excel. After this