

YouControl connector to Creatio



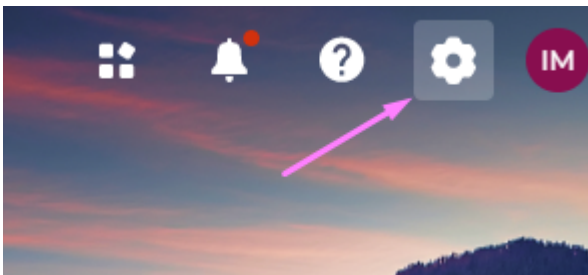
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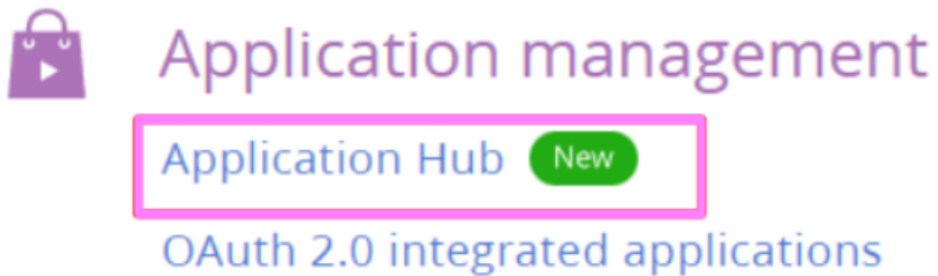


1. Installing the connector

1. The user is logged in to the system Creatio
2. Go to "Settings"



3. Go to "Application Hub"



Expected result: the login page to the personal account Creatio opens

LOG IN TO YOUR ACCOUNT

BUSINESS EMAIL

PASSWORD

[Forgot password](#)

LOG IN

or log in using



Don't have an account?

[SIGN UP](#)

4. Fill in the fields and log in to the account

Expected result: The application center will open

5. Click on "+ New application"
6. Select "Install from File"
7. Click on "Choose file"
8. Select the required file from the PC

Expected result: the page displays "Installing the application
This may take a few minutes"

INSTALLING THE APPLICATION ON YOUR CREATIO ENVIRONMENT

If the application is installed, the inscription "DONE" appears on the page

9. Click on "Go to the application center"



Expected result: The application center opens, and the new application is displayed



10. Log in to the Creatio system

2. Connector settings

For the correct operation of the connector, you need to get **API keys**
Key YouControl key - API key for obtaining general information about the counterparty.

Key for express analysis YouControl - API key for Express analysis and verification of the organization's connection with the aggressor country.

To receive ARI-keys from the YouControl service, you need to contact the responsible manager of the company, who will provide the necessary advice and ARI-keys

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Email:

- roman.gerbiy@youcontrol.com.ua

- support@youcontrol.com.ua

Information to be provided when applying:

- The company name
- EDRPOU
- e-mail of the contact person (to this e-mail will be sent messages about novelties in the API, as well as messages about changes or problems with registries)
- IP addresses for the whitelist.

Test keys

Pay attention! *Keys have a limited number of attempts and a limited period. When they expire, the application will stop working and you will need to purchase paid keys.*



You can get advice or test keys for Express Analysis and communication with the aggressor country (Russia, Belarus) from a YouControl employee

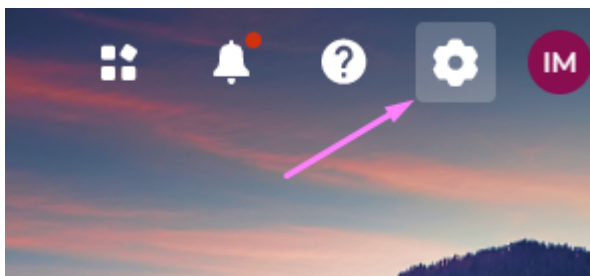
roman.gerbij@youcontrol.com.ua

Or you can get test keys through the ready-made application form

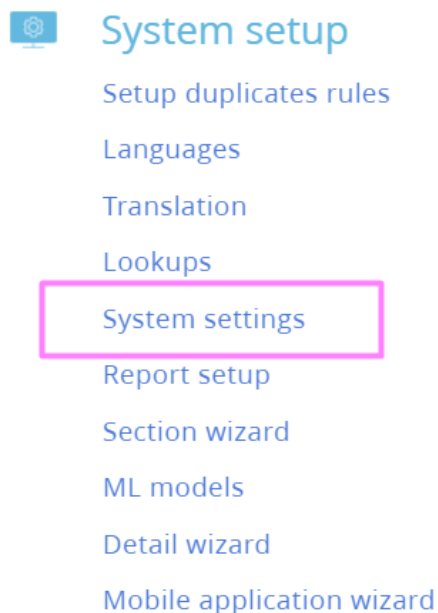
<https://youcontrol.com.ua/services/#services-api>

2.1. Entering the API-key in the Creatio system to obtain general information about the Accounts

1. Go to "Settings"



2. Click on "System Settings" in "System Setup"



3. Open "Key YouControl"

Name Contains you ✕

Name	Code
Key for express analysis YouControl	BtcApiKeyExpressAnalysisYouControl
Key YouControl	BtcApiKeyYouControl

4. Enter the API key in the "Default value" field

Key YouControl

[CLOSE](#)

Name* Key YouControl
Type* Text (250 characters)
Default value
Description

Code* BtcApiKeyYouControl
Cached
Save value for current user

↓

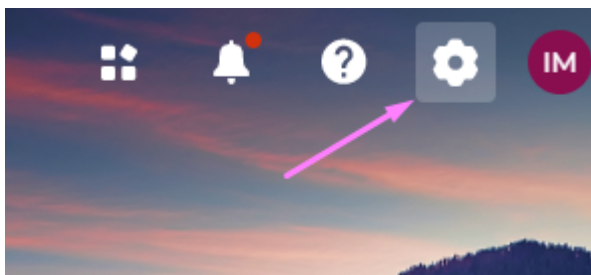
5. Save

Key YouControl

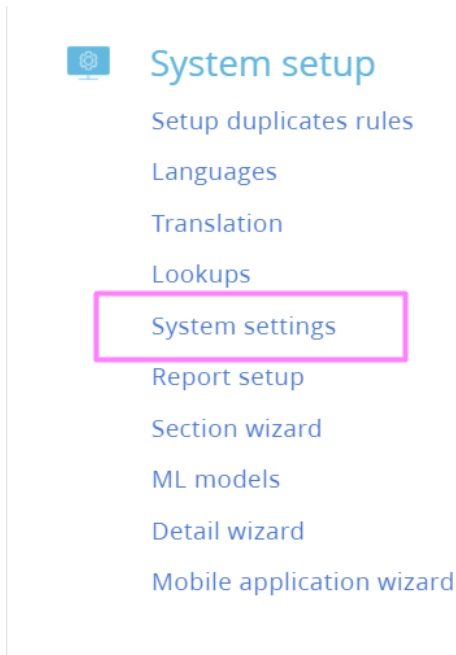
[SAVE](#) [CANCEL](#)

2.2. Entering the API-key into the Creatio system for receiving an express analysis and checking for communication with the aggressor of the counterparty

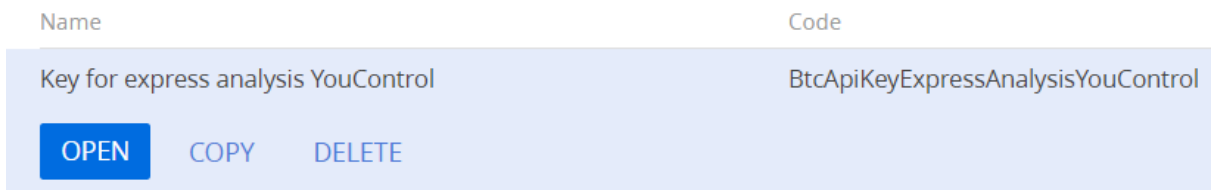
1.Go to "Settings"



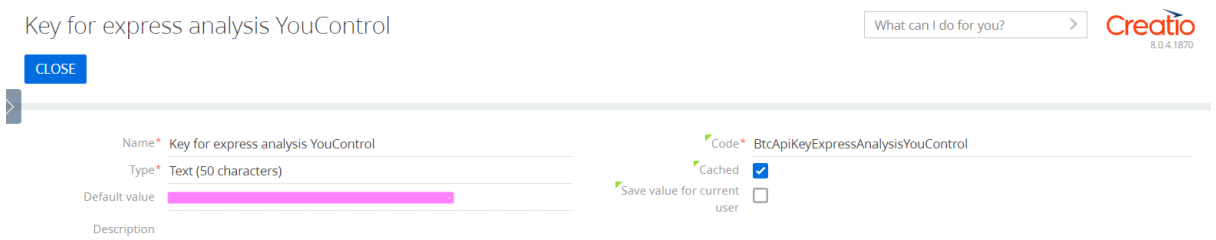
2. Click on "System Settings" in "System Setup"



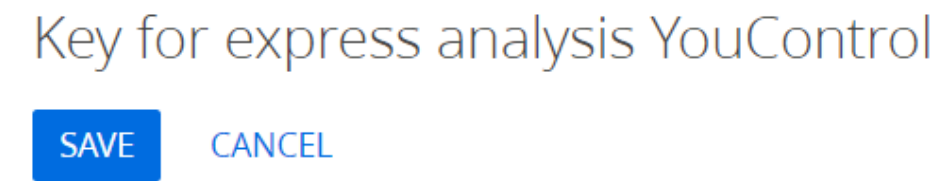
3. Open "Key for express analysis YouControl"



4. Enter the API key in the "Default value" field



5. Save



6. When verifying the organization, a contact will be created in the Contacts section



If you are checking your company and do not want to have a duplicate contact of your manager.

Go to System Settings

System settings

NEW FOLDER ADD SETTING ACTIONS

- ★ Favorites
- All
 - Campaigns section settings
 - Emails section settings
 - Landing pages section settings
 - Leads section settings
 - Administration
 - Agent desktop
 - Approvals
 - Case registration

Name	Code
Key for express analysis YouControl	BtcApiKeyExpressAnalysisYouControl
Key YouControl	BtcApiKeyYouControl
Paid request YouScore VAT	BtcIsPaidPDV
Paid request YouScore	BtcIsPaid
Logo - Thank you for your feedback	ImageThanksForRaiting
Create a director contact when updating YouControl data	BtcCreateDirectorContactYouControl

OPEN COPY DELETE

Open the Create a director contact when updating YouControl data setting and clear the Default value checkbox

Create a director contact when updating YouControl data

CLOSE

Name* Create a director contact when updating YouControl data

Type* Boolean

Code* BtcCreateDirectorContactYouControl

Default value

Cached

Save value for current user

Description

3. Using the connector

3.1 Filling out the page of the Accounts

1. The user is in the "Accounts" section

Accounts

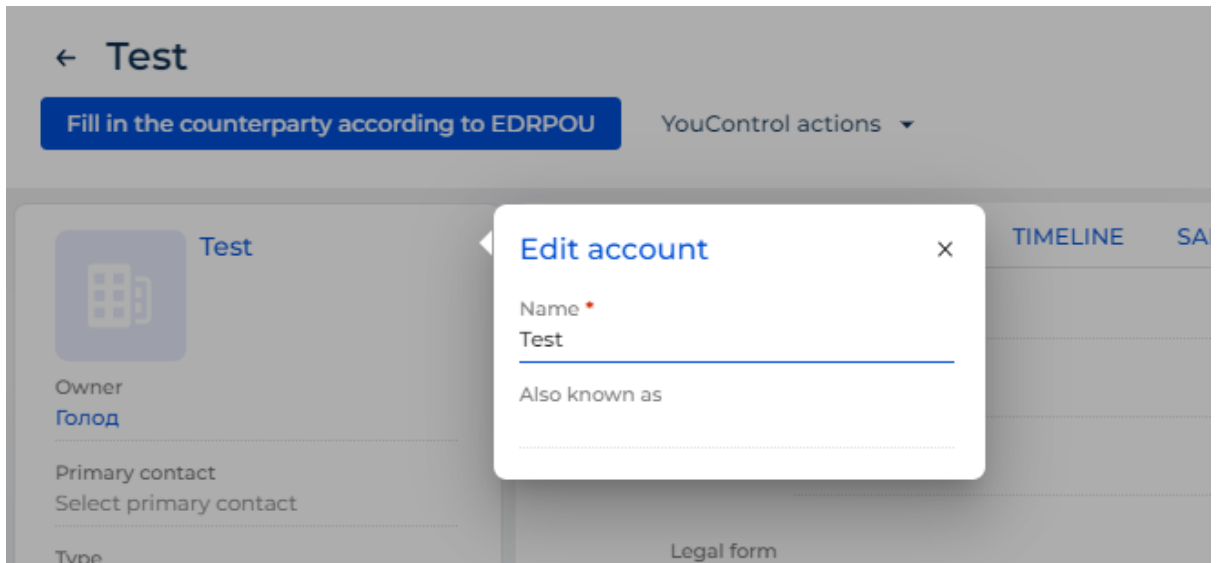
+ New

Folders

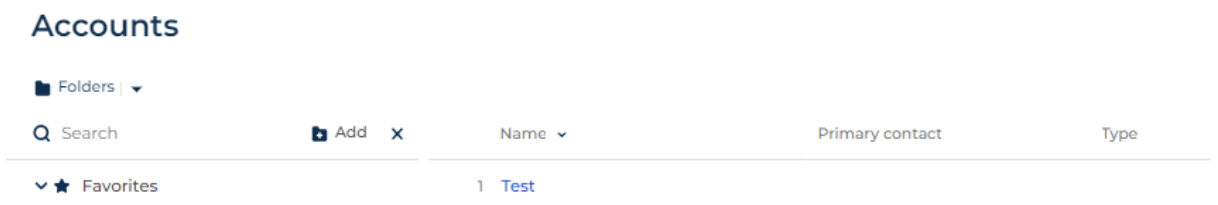
Name Primary contact Type Category Industry Web

Create Accounts

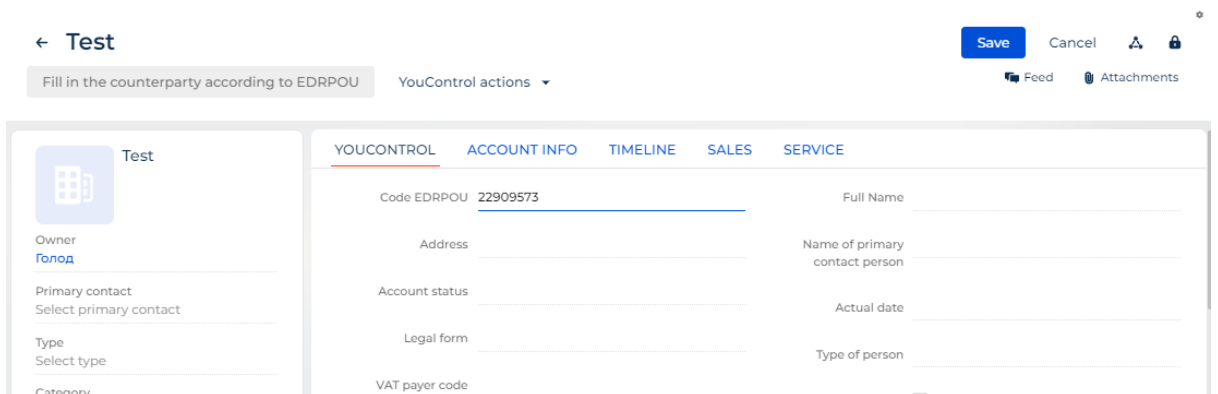




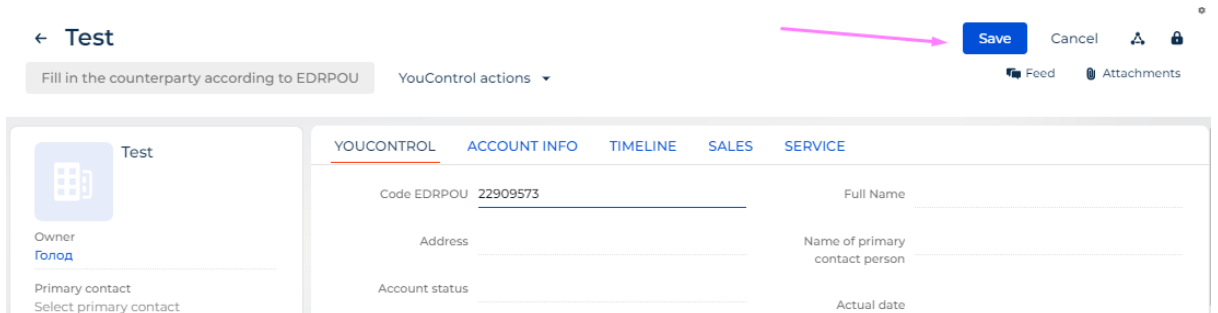
2. Open the page of the Accounts



3. Fill in the "Code EDRPOU" field in the "Youcontrol" tab

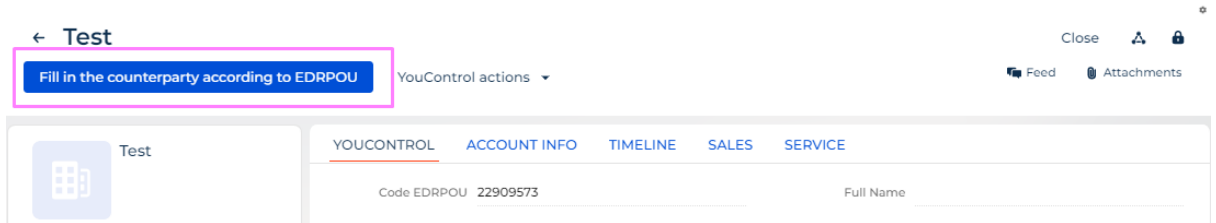


4. Save the page of the Accounts



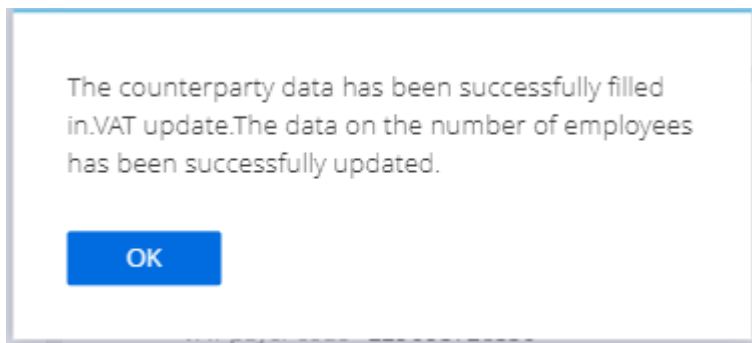
5. Click on the button "Fill in the counterparty for EDRPOU"





Expected result: the message "The counterparty data has been successfully filled in.VAT update.The data on the number of employees has been successfully updated." is displayed.

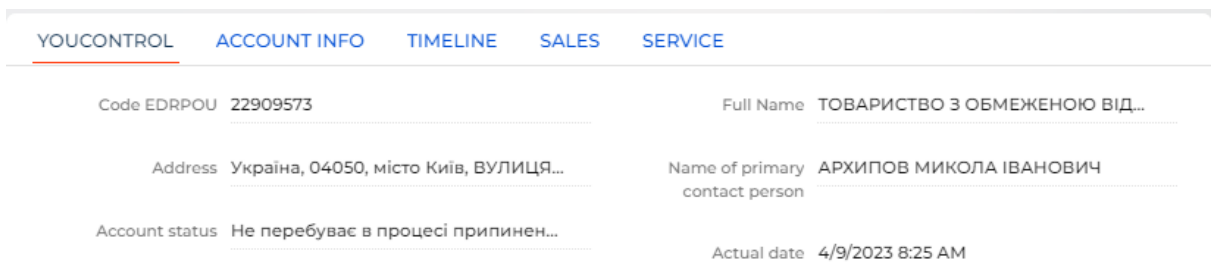
Information on the number of employees will be available on the condition that there are existing employees in the company



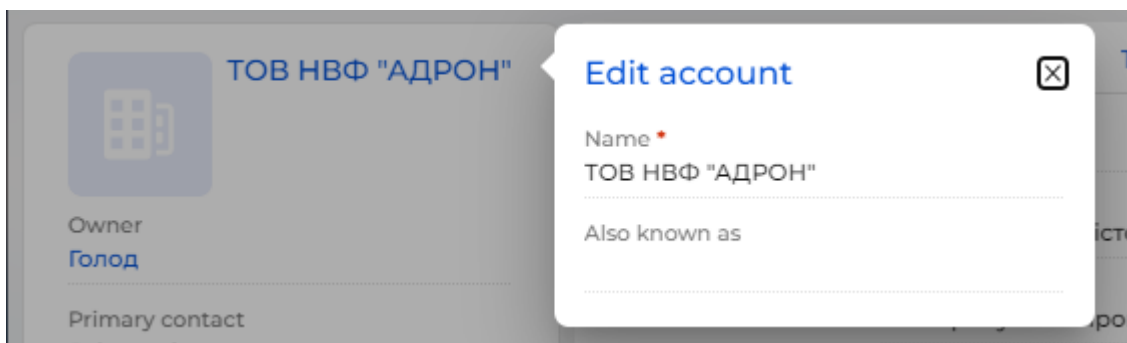
6. Click on "Ok"

Expected result: fields are filled:

- in the "Youcontrol" tab: "Full names", "Address", "Name of primary contact person", "Account status", "Actual date";



- in the sidebar, the "Name" field;



- in the "Account info" tab, more details "Address" - "Legal"



YOUCONTROL ACCOUNT INFO TIMELINE SALES SERVICE

Also known as
Enter other name

Business entity
Select entity

Annual revenue
Select revenue

No. of employees
Select employees number

Addresses + ↻ ⋮ 🔍

Address type	Full address	Primary	+ ⋮
1 Legal	Україна, 89412, Закарпатська обл., Ужгородський р-н, село Оно...	<input checked="" type="checkbox"/>	

- in the tab "Account info" detail "Contacts" - "Director"

Contacts + ↻ ⋮ 🔍

Full name	Full job title	Mobile phone	Email	+ ⋮
1 БИЛАК ОЛЕКСАНДР ОЛЕКСАН...	Директор			

7. If paid System setting Paid request YouScore is enabled

The following fields will be filled in:

- Legal form
- Type of person
- English full name
- English short name

YOUCONTROL ACCOUNT INFO TIMELINE SALES SERVICE

Code EDRPOU 00131529

Full Name ПРИВАТНЕ АКЦІОНЕРНЕ ТОВАРИС...

Address Україна, 89412, Закарпатська обл., У...

Name of primary contact person БИЛАК ОЛЕКСАНДР ОЛЕКСАНДРО...

Account status Не перебуває в процесі припинен...

Actual date 4/6/2023 6:23 AM

Legal form АКЦІОНЕРНЕ ТОВАРИСТВО

Type of person Юридична особа (ІОО)

VAT payer code 001315207010

VAT payer

English full name PRIVATE JOINT STOCK COMPANY "Z...

English short name PRJSC "ZAKARPATTYAOBLENERGO"

Update information date 4/10/2023 1:59 PM

- The number of employees on the YouControl tab



Number of employees 🔄 : Q

Account	Year for which information is provided	Minimum number of employees	+ :
1 ПРАТ "ЗАКАРПАТТЯОБЛ...	2,018	2,000	2,0
2 ПРАТ "ЗАКАРПАТТЯОБЛ...	2,019	2,000	2,0
3 ПРАТ "ЗАКАРПАТТЯОБЛ...	2,017	2,000	2,0
4 ПРАТ "ЗАКАРПАТТЯОБЛ...	2,006	2,500	3,0

8. If the paid system setting Paid request YouScore VAT is enabled

The following fields will be filled in:

- VAT payer
- VAT payer code

The screenshot shows the 'ACCOUNT INFO' tab in the YouControl system. The 'VAT payer code' field (001315207010) and the 'VAT payer' checkbox (checked) are highlighted with a pink box. Other visible fields include Code EDRPOU (00131529), Full Name (ПРИВАТНЕ АКЦІОНЕРНЕ ТОВАРИС...), Address (Україна, 89412, Закарпатська обл., У...), Name of primary contact person (БІЛАК ОЛЕКСАНДР ОЛЕКСАНДРО...), Account status (Не перебуває в процесі припинен...), Actual date (4/6/2023 6:23 AM), Legal form (АКЦІОНЕРНЕ ТОВАРИСТВО), Type of person (Юридична особа (ЮО)), English full name (PRIVATE JOINT STOCK COMPANY "Z..."), and English short name (PRJSC "ZAKARPATTYAOBLENERGO").

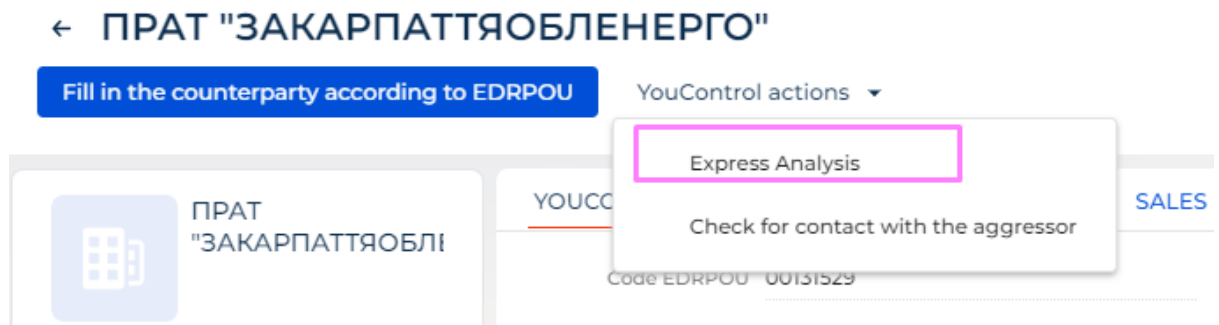
3.2 Express analysis of the Accounts

1. The Accounts page is open, where you need to do an Express analysis
2. Fill in the "Code EDRPOU" field in the "Youcontrol" tab, if the field is not filled out

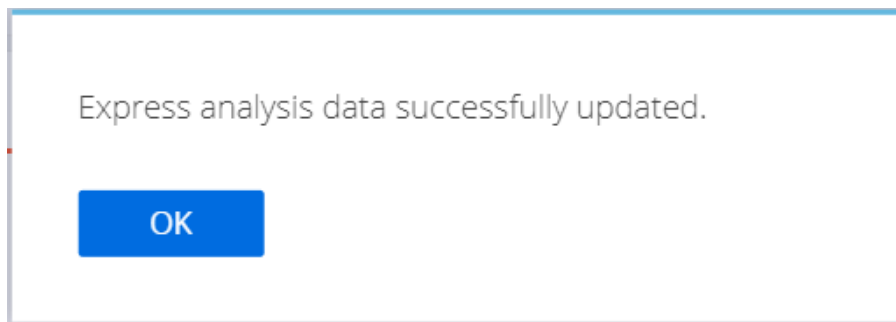
The screenshot shows the 'ACCOUNT INFO' tab in the YouControl system. The 'Code EDRPOU' field is filled with the value '22909573'. Other fields are empty or partially filled.

3. Click on "YouControl Actions" and select "Express Analysis"





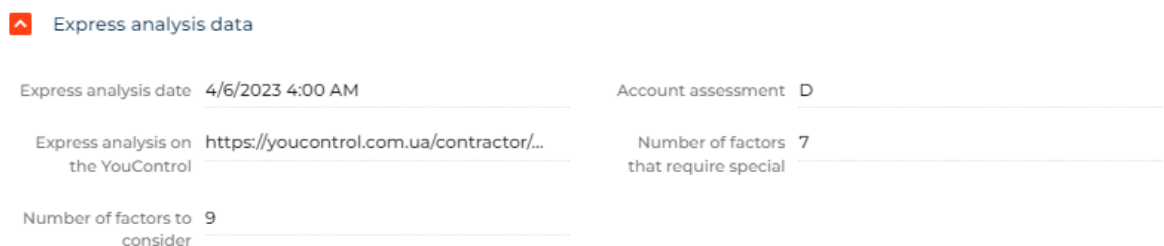
Expected result: the message "Express analysis data successfully updated" is displayed



4. Click on "Ok"
5. Go to the "Youcontrol" tab

Expected result:

- all fields from the group of fields "Express analysis data" are filled



The meaning of the letters in the "Account assessment" field:

- A** - No special signals were detected
- B** - It is worth paying attention
- C** - Special attention is required
- D** - Extreme close attention is required



- the "Express analysis results" detail is filled

Express analysis results

Factor significance level	Express analysis name	Factor group name	Actual d +
1 Need to pay attention	Інформація про кримінальні про...	Інформація про криміна...	1/18/2023
2 Need to pay attention	Зв'язок з національним публічни...	Ризикові зв`язки	4/6/2023
3 Need special attention	Обмежена компетенція посадов...	Правосуб'єктність	4/10/2023
4 Need to pay attention	Відкриті виконавчі провадження	Заборгованість	4/6/2023

3.3 Checking the Accounts for communication with the aggressor

1. The page of the Accounts is open, where you need to check the connection with the aggressor
2. Fill in the "Code EDRPOU" field in the "Youcontrol" tab, if the field is not filled out

YOUCONTROL ACCOUNT INFO TIMELINE SALES SERVICE

Code EDRPOU 22909573 Full Name

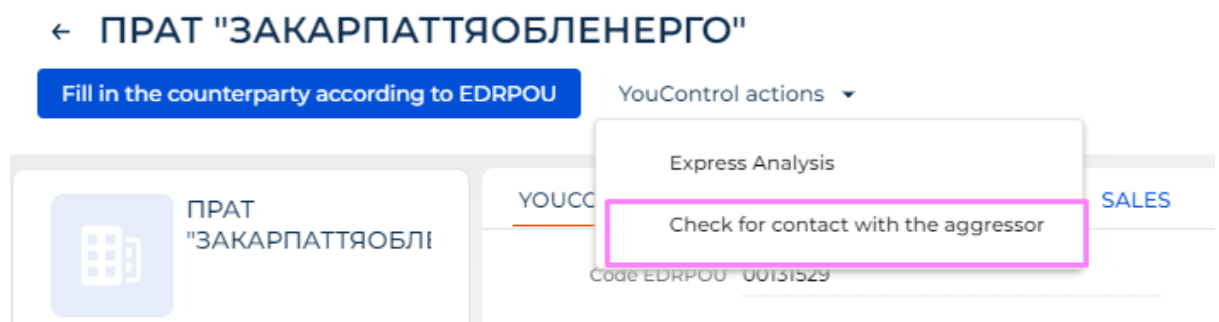
Address Name of primary contact person

Account status Actual date

Legal form Type of person

VAT payer code

3. Click on "YouControl actions" and select "Check for contact with the aggressor"



Expected result: the message "Express analysis data successfully updated" is displayed

Express analysis data successfully updated.

OK

4. Click on "Ok"
5. Go to the "Youcontrol" tab

Expected result:

- all fields from the group of fields "Check for connections with the aggressor" are filled

 Check for connections with the aggressor

Check date 4/10/2023 4:00 AM

Test results on the YouControl website <https://youcontrol.com.ua/contractor/...>

Number of suspicious factors 1

The number of identified important 0

- the detail "The Results of the test for connections with the aggressor" is filled out

 The results of the test for connections with the aggressor   

Factor significance level	Express analysis name	Factor group name	Actual date +	
1	Need to pay attention	Контрагент має історичний зв'яз...	Ризикові зв'язки	4/10/2023

4. Errors that may occur when installing the connector

1. Unknown error. Please, contact BeTech Support at marketplace@btbpm.com to resolve
2. 400 - Error while receiving data. Check the correctness of the EDRPOU code, and try to repeat the request in a few minutes
3. 401: API keys missing or invalid. Check the correct filling of the API keys in the System settings, or check the relevance of the API keys in YouControl technical support. support@youcontrol.atlassian.net
4. 403: Error while receiving data. Contact the manager of YouControl and clarify the relevance of the contract. The contract may have expired or all available requests have been used

5. 404: Account with this EDRPOU code does not exist or the information is missing

