

YouControl connector to Creatio



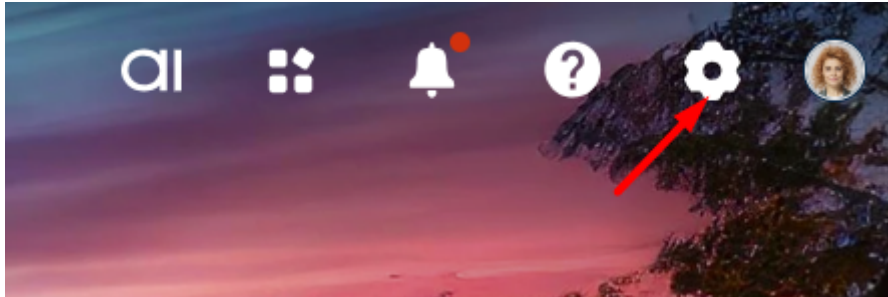
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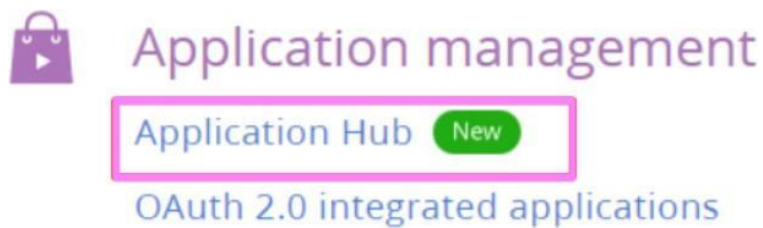


1. Installing the connector

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


LinkedIn


Google


Facebook

Don't have an account?

[SIGN UP](#)

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



Expected result: The application hub 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 centre"

Expected result: The application hub 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:

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- 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 must 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.gerbiy@youcontrol.com.ua

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

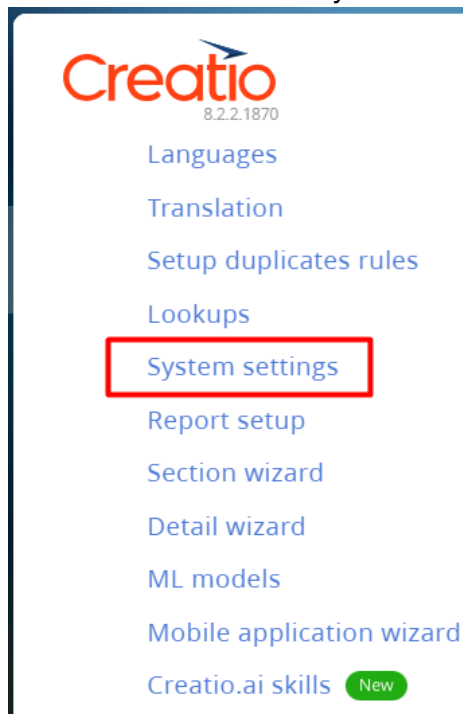
<https://youcontrol.com.ua/services/#services-api>

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	Code
Key for express analysis YouControl	BtcApiKeyExpressAnalysisYouControl
Key YouControl	BtcApiKeyYouControl

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

Key YouControl What can I do for you? > **Creatio** 8.0.4.1870

CLOSE

>

Name* Key YouControl Code* BtcApiKeyYouControl

Type* Text (250 characters) Cached ☒

Default value Save value for current user ☐

Description 

5. Save

Key YouControl

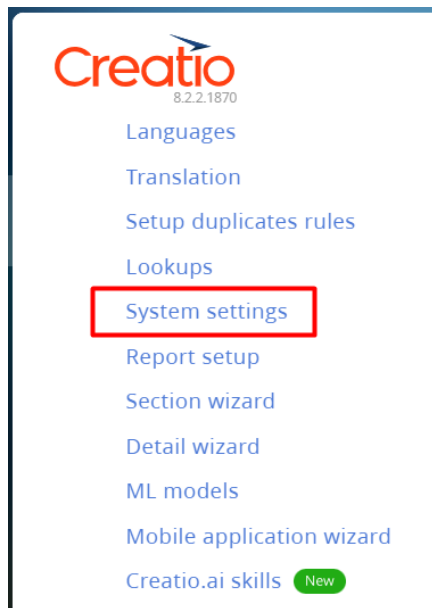
SAVE CANCEL

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"

Name	Code
Key for express analysis YouControl	BtcApiKeyExpressAnalysisYouControl
<button>OPEN</button> <button>COPY</button> <button>DELETE</button>	

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

Key for express analysis YouControl What can I do for you? > 

CLOSE

Type* Text (50 characters)

Default value

Description

Save value for current user ☒

5. Save

Key for express analysis YouControl

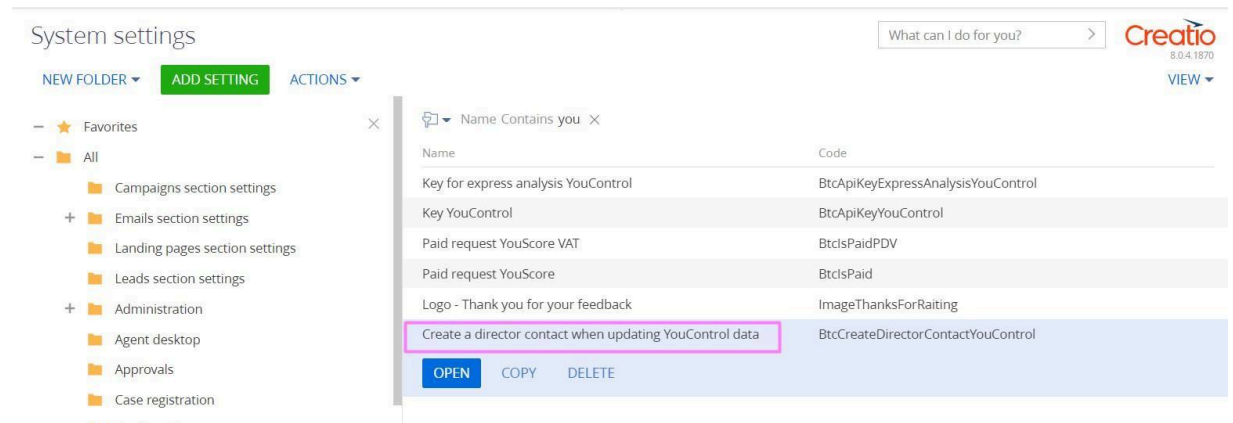
SAVE CANCEL

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

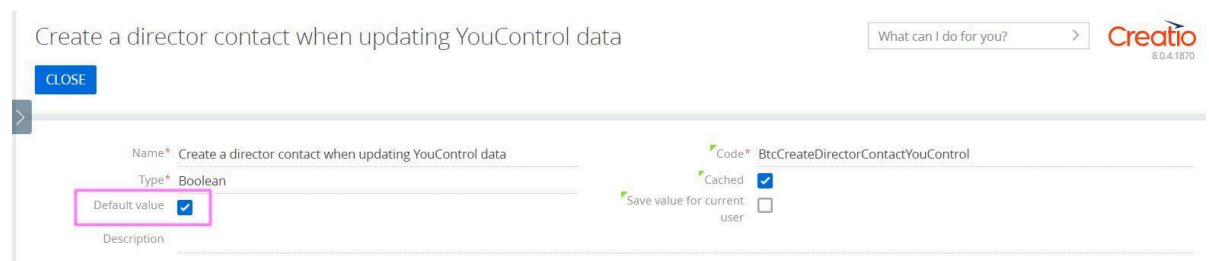


If you are checking your company and do not want to have a duplicate contact of your manager

1) Go to System Settings

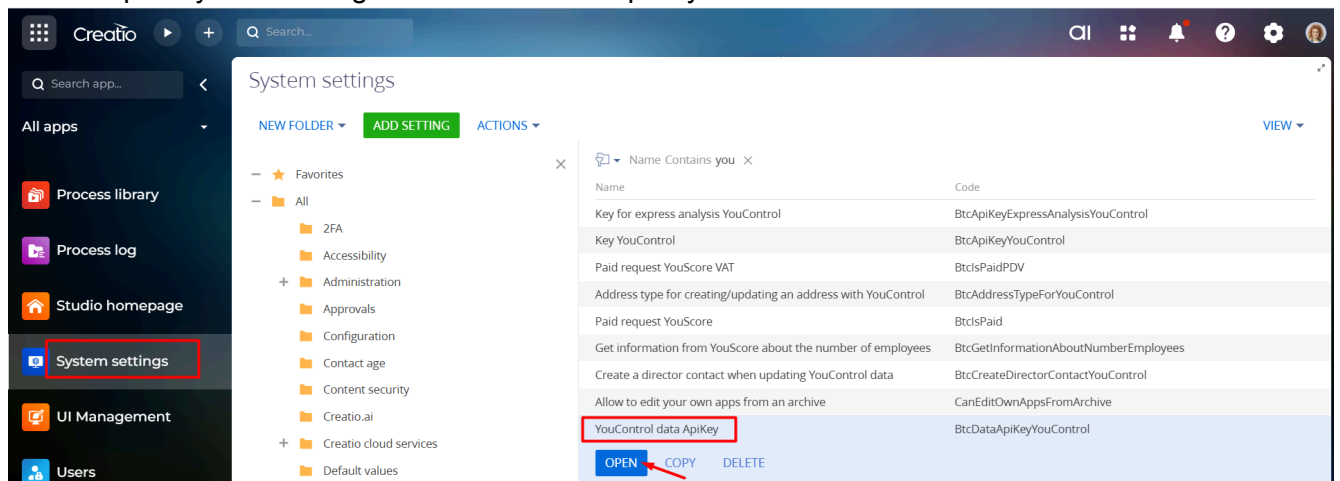


2) Open the Create a director contact when updating YouControl data setting and clear the Default value checkbox



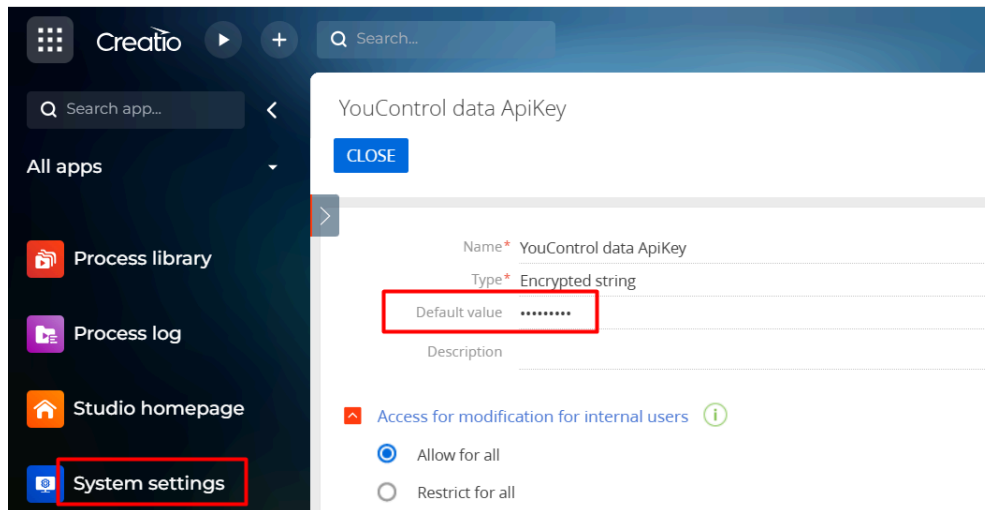
2.3. Entering the API-key into the Creatio system to obtain the ability to generate an extended PDF report on a counterparty

1. Open system settings YouControl data ApiKey

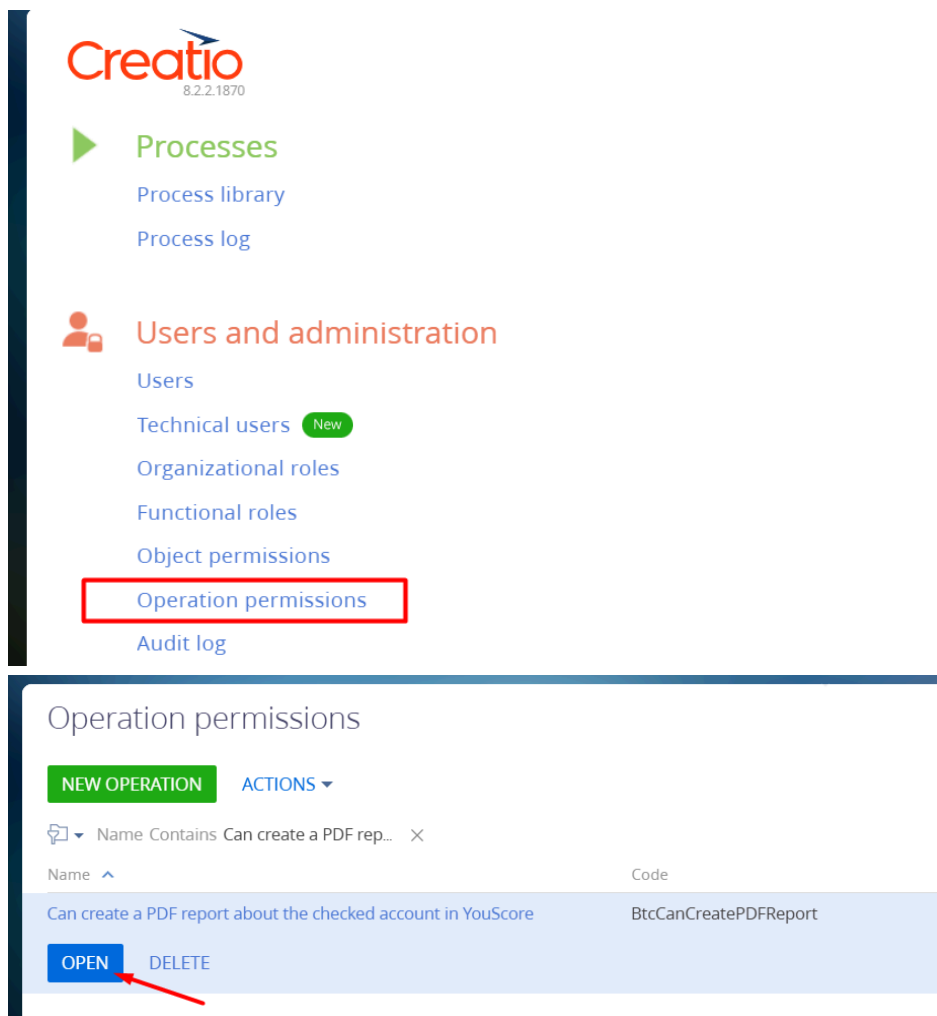


2. Enter the API key in the "Default value" field
3. Save





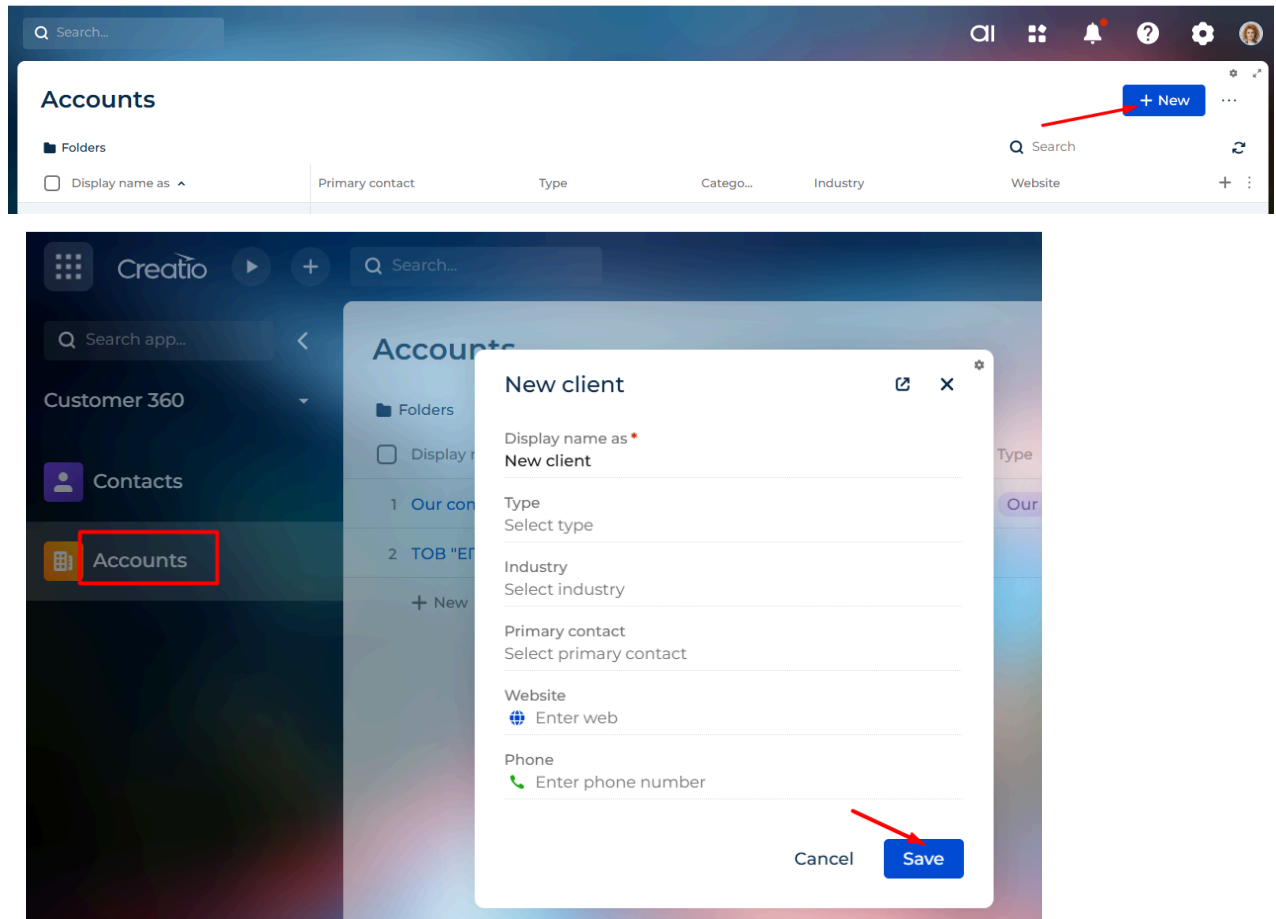
Important! The API key to obtain the ability to generate an extended PDF report on a counterparty will work only for those users who are granted permission for the operation *Can create a PDF report about the checked account in YouScore*



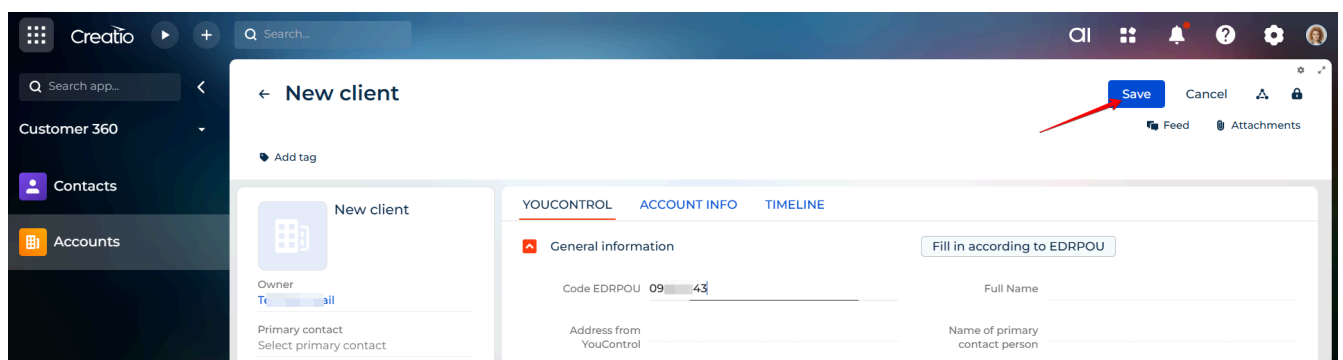
3. Using the connector

3.1 Filling out the page of the Accounts

1. The user is in the "Accounts" section. Create Accounts

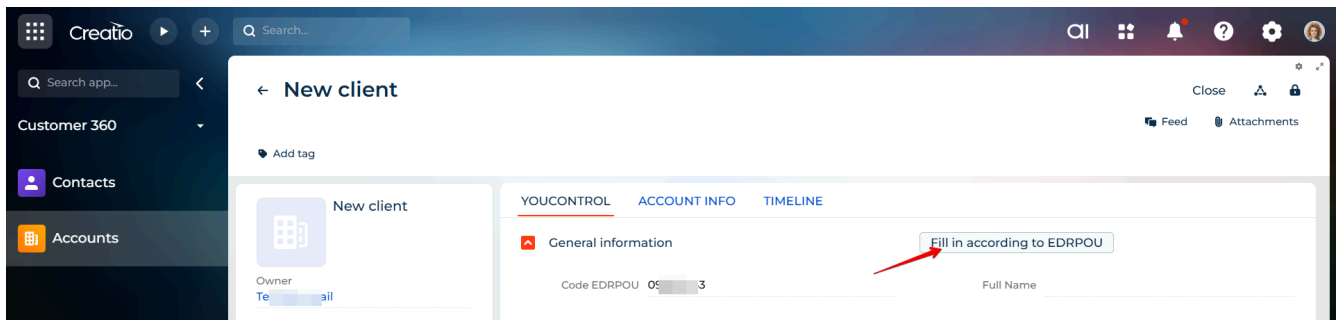


2. Open the page of the Accounts
3. Fill in the "Code EDRPOU" field in the "Youcontrol" tab



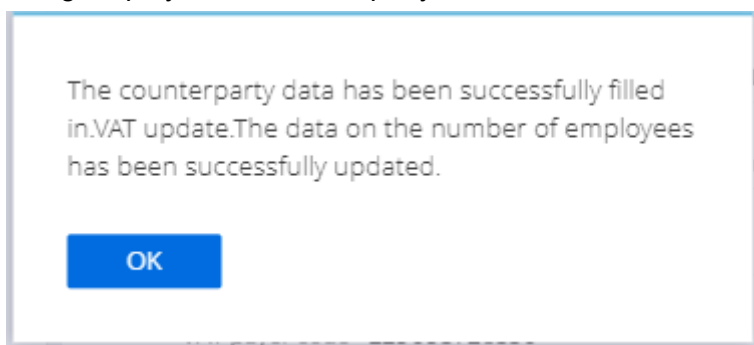
4. Save the page of the Account
5. Click on the button "Fill in according to EDRPOU"





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.

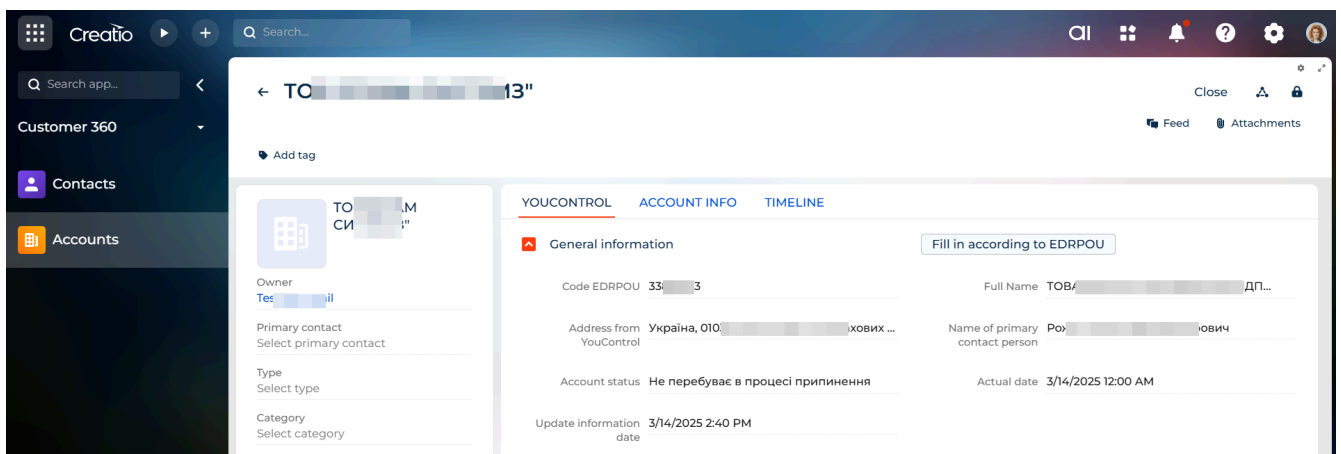
Information on the number of employees will be available on the condition that there are existing employees in the company



6. Click on "Ok"

Expected result: fields are filled:

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



- in the sidebar, the "Name" field;

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



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

The screenshot shows the 'Account info' tab for a contact. The left sidebar contains 'Customer 360', 'Contacts', and 'Accounts'. The main area has tabs for 'YOUCONTROL', 'ACCOUNT INFO', and 'TIMELINE'. Under 'ACCOUNT INFO', there are fields for 'Company', 'Business entity', 'Annual revenue', and 'No. of employees'. Below these are sections for 'Addresses' and 'Contacts'. The 'Contacts' section shows a list with one entry: 'Роздобич 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

The screenshot shows the 'ACCOUNT INFO' tab with various fields. A red box highlights the 'Legal form' (АКЦІОНЕРНЕ ТОВАРИСТВО) and 'Type of person' (Юридична особа (ЮО)) fields. Another red box highlights the 'English full name' (PRIVATE JOINT STOCK COMPANY "Z...") and 'English short name' (PJSC "ZAKARPATTYAUBLENERGO") fields. Other visible fields include 'Code EDRPOU', 'Full Name', 'Address', 'Name of primary contact person', 'Account status', 'Actual date', 'VAT payer code', and 'VAT payer'.

- The number of employees on the YouControl tab

Number of employees 🔍

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

8. If the paid system setting Paid request YouScore VAT is enabled The following fields will be filled in:

- VAT payer
- VAT payer code

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 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 (ІОО)

VAT payer code 001315207010

VAT payer ☒

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

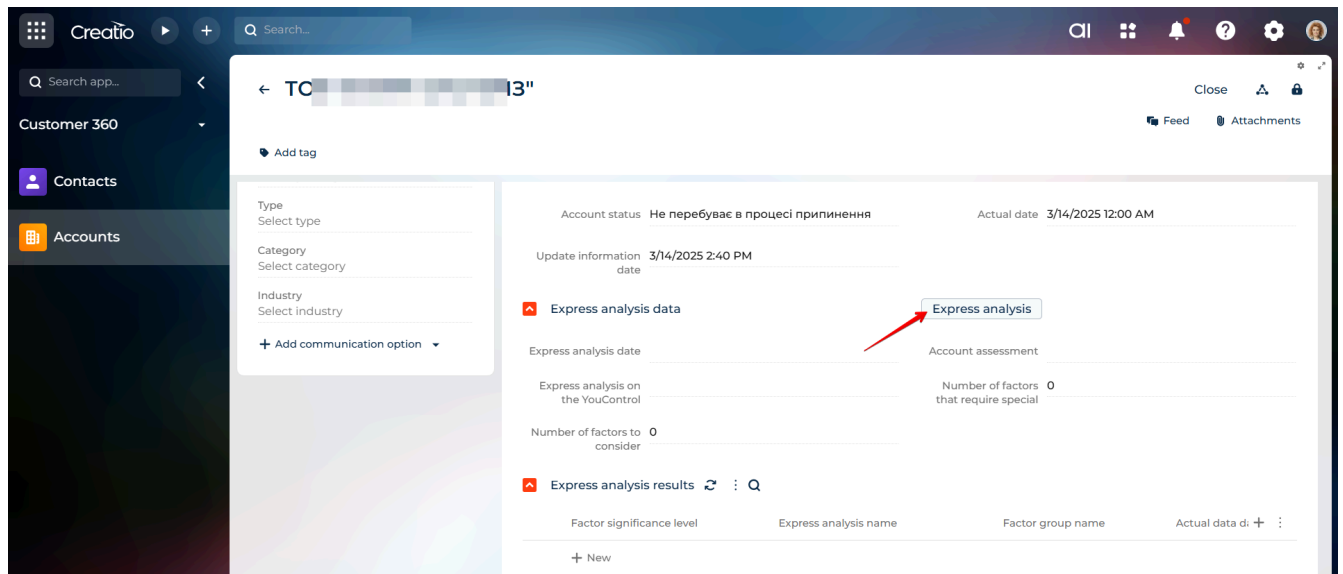
English short name PRJSC "ZAKARPATTYAUBLENERGO"

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

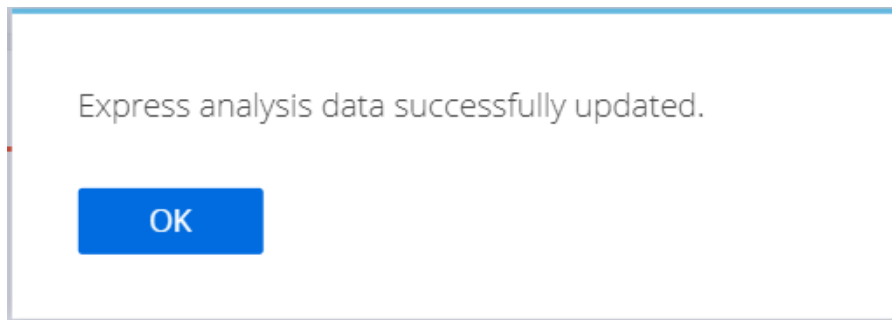
3.2 Express analysis of the Accounts

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
3. Click on "Express Analysis"





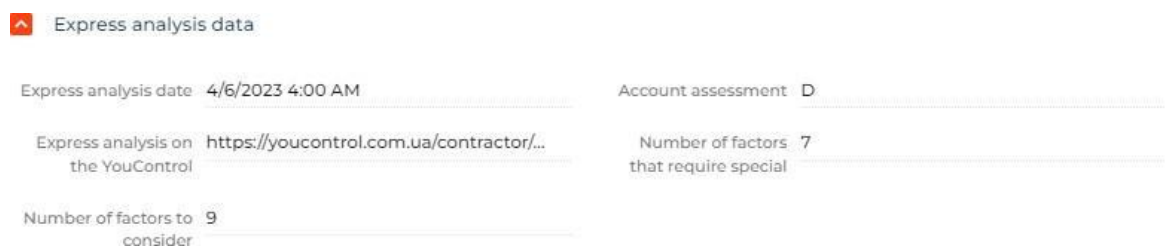
Expected result: the message "Express analysis data successfully updated" is displayed



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

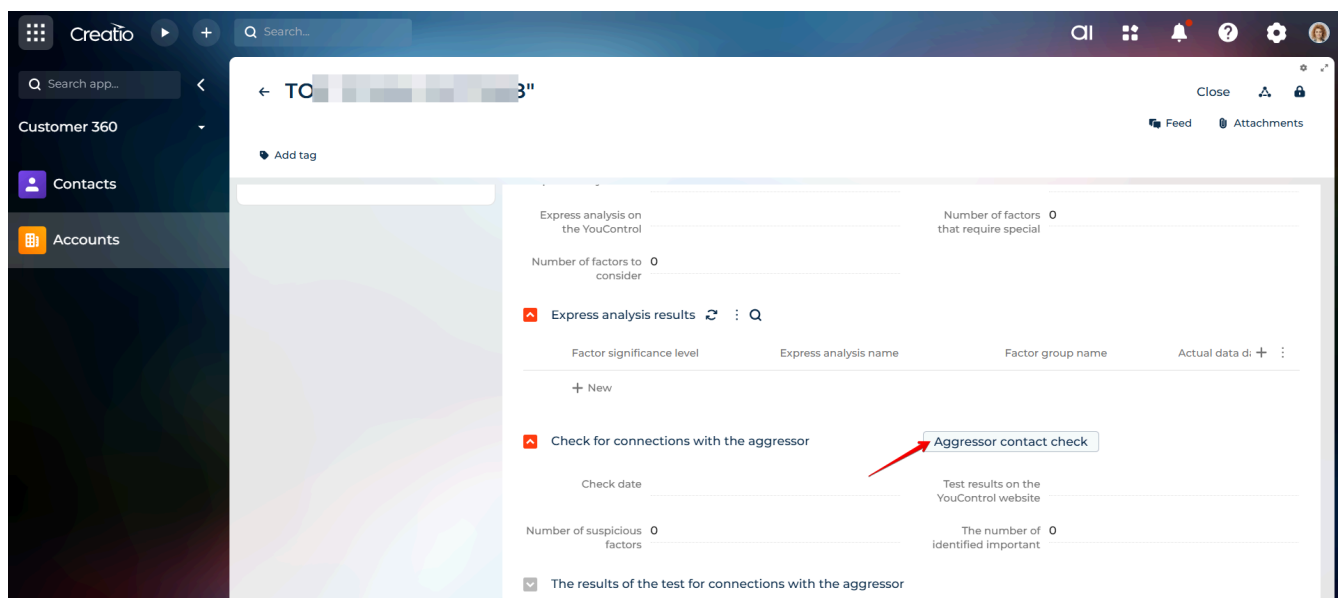
the "Express analysis results" detail is filled



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
3. Click on "Aggressor contact check"



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

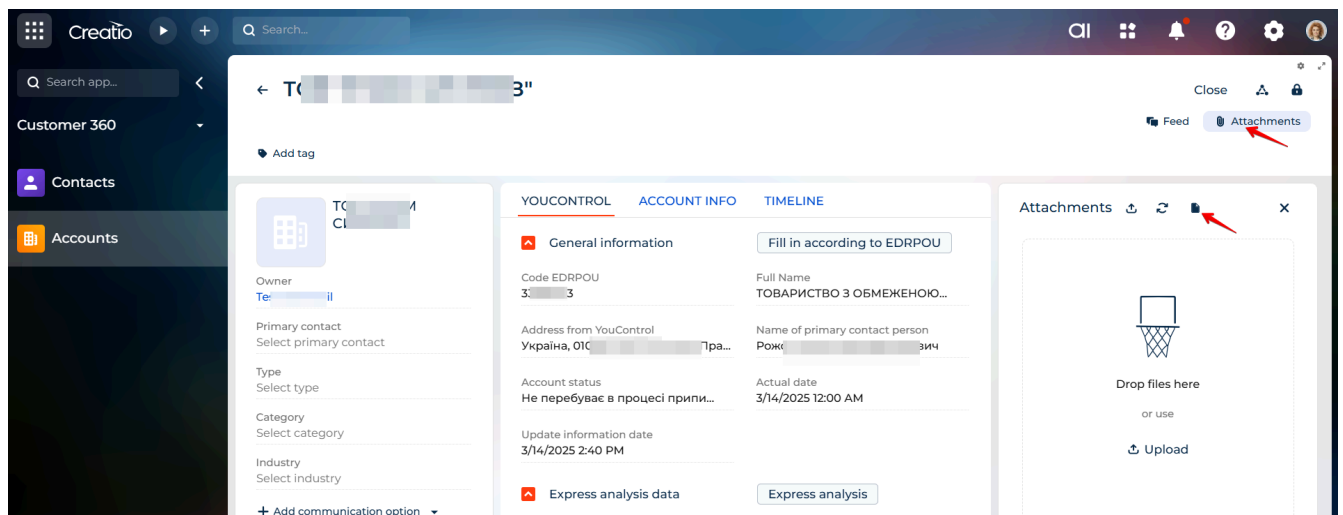


The results of the test for connections with the aggressor			
Factor significance level	Express analysis name	Factor group name	Actual dat +
1 Need to pay attention	Контрагент має історичний зв'яз...	Ризикові зв'язки	4/10/2023

3.4 Create a detailed PDF account report by YouControl

Important! The ability to generate an extended PDF report on a counterparty will appear only for those users who are granted permission for the operation *Can create a PDF report about the checked account in YouScore*

1. The page of the Accounts is open, where you need to generate an extended PDF report on a counterparty
2. Fill in the "Code EDRPOU" field in the "Youcontrol" tab, if the field is not filled out
3. Open Attachments bar
4. Click on "Create a detailed PDF account report by YouControl" icon

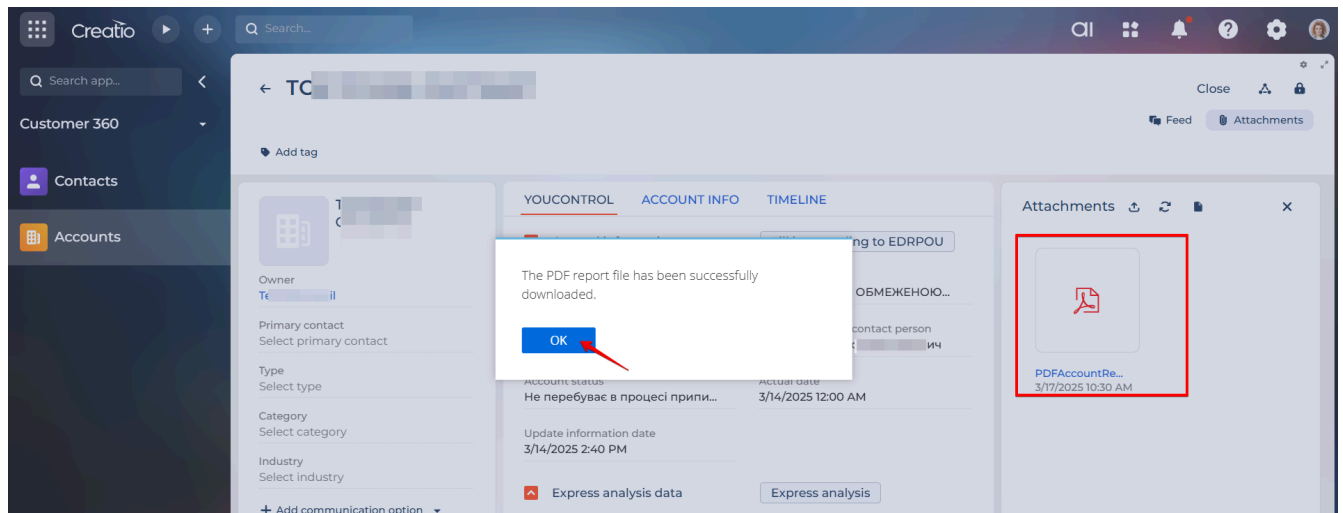


Expected result:

- the message "The PDF report file has been successfully downloaded" is displayed
- The PDF report will appear in the Attachments bar

5. Click OK





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

