crecise

snapADDY connector
for Creatio

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crecise GmbH
Leiziger Straße 3
60487 Frankfurt am Main
Germany

Registered office of the company:
Frankfurt am Main
Local court Frankfurt am Main HRB 96481
VAT-ID: DE289382186
Managing Directors: Sascha Krause, Martin Petek

Bank details:
Frankfurter Volksbank Rhein-Main eG
IBAN: DE83501900006600015891
BIC/Swift-Code: FFVBDEFFXXX

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1. Introduction

The snapADDY Business Card Reader Integration for Creatio, developed by crecise, bridges the gap between snapADDY's efficient contact data extraction capabilities and Creatio. This integration allows users to seamlessly transfer contact data collected via snapADDY into Creatio, enhancing efficiency and accuracy in managing customer relationships.

2. What is snapADDY?

snapADDY is a software tool that simplifies the process of capturing and managing contact information. Using OCR technology, snapADDY can:

- Extract contact details from scanned business cards.
- Integrate with external systems like Creatio to transfer and manage contact information.

This enables organizations to minimize manual data entry and reduce errors in contact data management.

3. Application Setup

3.1 Package Installation

The snapADDY connector for Creatio Integration is packaged as a zip archive and can be easily installed via Creatio's Application Hub.

- Navigate to the Application Hub in your Creatio environment.
- Upload the zip archive and complete the installation.
- Once successfully installed, the integration will appear in your Application Hub interface.
- **Perform a separate compilation, from Creatio configuration section after installing the package.**
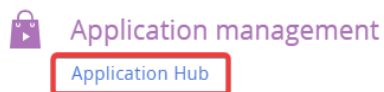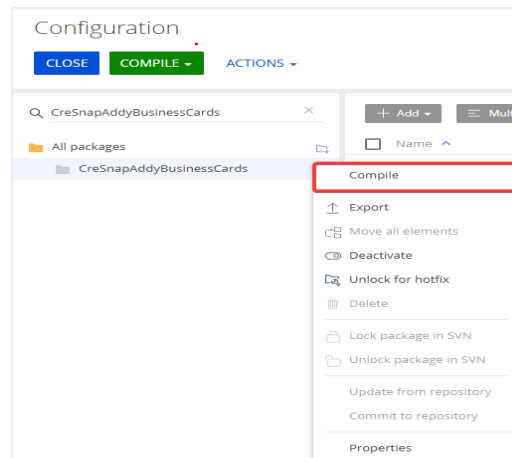
3.2 snapADDY Configuration

To start using the integration, you will need an active snapADDY subscription (click here to register).

After signing in to your snapADDY account in a web browser, follow these steps to link snapADDY to your Creatio profile:

1. Go to General Settings **>** System Integration **>** System Integration Dropdown **> snapADDY** API**.**
2. In the snapADDY API-Integration settings:

- Paste your Creatio Webhook URL into the provided input field (your Webhook URL can be found under the "Webhooks" section > Help > Webhook URL > snapAddy) in your Creatio account).
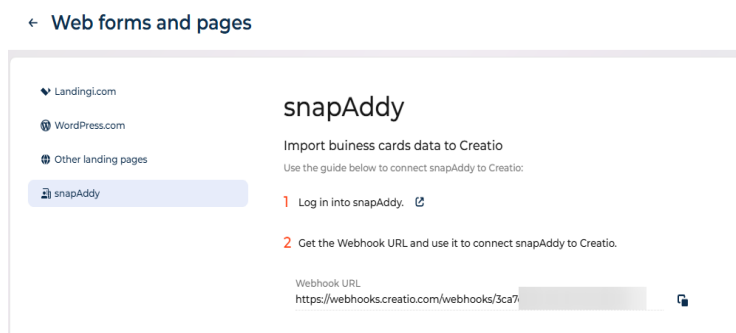
- Select POST as the HTTP method.
- Save the settings.

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System integration

[snapAddy API ▼]

Select your system

URL

https://webhooks.creatio.com/webhooks/3ca7d0

HTTP method

○ GET
● POST

With the snapADDY app installed on your phone, you can now effortlessly scan business cards. The scanned contact data will automatically appear in your Creatio CRM system. Simply choose the '**snapADDY API**' **export** option when exporting a card from the mobile app. To monitor the scanning process and ensure successful data transfer, refer to the Webhooks section in your Creatio account.

With the steps above, the minimal setup is complete. Optional fine-tuning and advanced configurations are described in the following sections. To ensure scanned addresses are displayed fully, please prepare the geodata as outlined in sections 6.2 to 6.4.

4.   snapADDY-Creatio field mappings

The integration requires a specific system setting to map snapADDY data to Creatio entities (Contact & Account). These mappings are stored in JSON format and define how fields in the snapADDY webhook correspond to fields in Creatio.

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SnapAddy-Creatio field mappings

CLOSE

Name*	SnapAddy-Creatio field mappings		Code*	CreciseSnapAddyFieldMappings
Type*	Text		Cached	☑
Default value	{ "email": "Email", "organization": "AccountId", "phone": "Phone", "mobile...		Save value for current user	☐
Description				

4.1 Default Field Mappings

```
{
    "email": "Email",
    "organization": "AccountId",
    "phone": "Phone",
    "mobile": "MobilePhone",
    "city": "CityId",
    "zip": "Zip",
    "street": "Address",
    "state": "RegionId",
    "country": "CountryId",
    "position": "JobTitle",
    "firstName": "GivenName",
    "lastName": "Surname",
    "fax": "Account.Fax",
    "gender": "GenderId",
    "website": "Account.Web"
}
```

4.1.1 Explanation of Fields

snapADDY Field	Creatio Field (Code)	Field Type	Description
email	Email	Text	Email address.
organization	Account	Lookup	Related Account
phone	Phone	Text	Phone number
mobile	MobilePhone	Text	Mobile phone
city	City	Lookup	City
zip	Zip	Text	Postal code
street	Address	Text	Street address.
state	Region	Lookup	Region/province
country	Country	Lookup	Country
position	JobTitle	Text	Job title
firstName	GivenName	Text	First name
lastName	Surname	Text	Last name
fax	Account.Fax	Text	Related Account's fax
gender	Gender	Lookup	Contact's gender

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| website | Account.Web | Text | Related Account's website |

5. New Fields Introduced for snapADDY Integration

5.1 Adding New snapADDY Fields to the Creatio UI

The new snapADDY fields ("Imported by snapADDY" and "snapADDY Notes"), located either on the Contact and the Account page, can be added to the Creatio user interface (UI) using the Page Designer.

Specifically, these fields can be added in the following ways:

- **Page Layout (Page Designer):** The fields can be added to the page layout of the Contact or Account, making them visible when viewing individual records.

- **Section List Page (Column Configuration):** The fields can also be added as separate columns in the Contact or Account section list page. This allows users to see the values of these fields for multiple records at a glance in the list view.
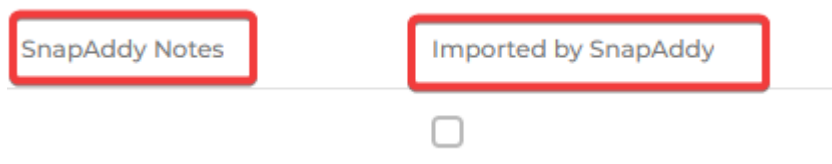
5.2 Contact

- **Imported by snapADDY**: Boolean. This field indicates whether the contact record was imported via the snapADDY integration
- **snapADDY Notes**: Text. This field stores any unmapped data received from the snapADDY webhook (Example: An unmapped City).

5.3 Account

- **Imported by snapADDY**: Boolean. This field indicates whether the account record was imported via the snapADDY integration.

6. Integration Rules

6.1 Account Matching

To prevent duplicate accounts, the system applies the following logic before creating a new account from snapADDY data:

1. **Duplicate Check:** The system searches for an existing account with the **same name** as the one received from snapADDY.
2. **Match Found:** If an account with a matching **name** is found:
   a. A new account is *not* created.
   b. The existing account's fields (web, fax) are updated with the fresh data from snapADDY.
3. **No Match Found:** If no matching account name is found, a **new** account record is created.

6.2 Contact Matching

1. **Duplicate Check:** The system searches for an existing contact with the **same First Name, Last Name, Account Name** as the one received from snapADDY.
2. **Match Found:** If a contact with a matching **First Name, Last Name, Account Name** is found:
   a. A new contact is *not* created.
   b. The webhook record will show a **Failed** status, and the System Admin can review the Webhook Log to identify the issue.

6.3 Country Mapping

*** Data Quality**: The Country table in Creatio must contain unique two-letter country codes (ISO 3166-1 Alpha-2). Example: "DE" for Germany.*

snapADDY provides country information using ISO 3166-1 Alpha-2 codes (e.g., "DE" for Germany). To ensure proper mapping to Creatio's Country table, the following logic is applied:

1. **Code Comparison:** The snapADDY country code is compared against the Alpha2Code field in Creatio's Country table.
2. **Match Found:** If a matching Alpha2Code is found, the corresponding Creatio Country record is used.
3. **No Match Found:** If no matching Alpha2Code is found:
   a. A new Country record is *not* created.
   b. The unmatched snapADDY country code is stored in the snapADDY Notes field on the Contact record. This prevents the creation of duplicate or incorrect Country records.

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Lookups

NEW CLOSE ACTIONS ▾

Countries

🔖 ▾ Name Contains **Germany** ✕

Name	Two-letter country code
Germany	DE

6.4 Region Mapping

*** Data Quality**: Ensure that Region Codes are **unique per Country** in the Region table. For example, the Code "HE" for Hessen (Germany) should not be duplicated under Germany.*

snapADDY provides region information using region codes (e.g., "HE" for Hessen). To ensure accurate mapping to Creatio's Region table, the following logic is applied:

1. **Matching Logic**:
   - **Match Found**: snapADDY Region Code is matched with `Region.Code + Region.Country`.
2. **No Match Found**:
   - **No** Region is created.
   - The Region code is stored in **snapADDY Notes**.

3. **Edge Case – No Region Provided**:
- If snapADDY provides no Region, but the matched City has a Region set in Creatio:
   - That Region is **auto-inferred** and used.

4. **Region Mismatch Rule**:
   - If a Region is provided but the matched City has a **different Region**, the City is **not mapped**.
   - snapADDY Notes updated accordingly with the City name.

Lookups

NEW STATE/PROVINCE CLOSE ACTIONS ▾

States/provinces

🔖 ▾ Name Contains **Hessen** ✕

Name	Region code
Hessen	HE

6.5   City Mapping

* *Data quality: Ensure City names are unique **within each Country**. Avoid duplicates unless ZIP-based disambiguation is available (see 6.5).*

City mapping is performed based on the city name received from snapADDY. The process is as follows:

1. **Matching Logic**:

   Match Found: The snapADDY city name is matched against City.Name, scoped within CountryId, and optionally RegionId if provided. If a single match is found, it is used.

2. **No Match Found**:
   a. City is **not created**.
   b. Value is logged in snapADDY Notes.

   Region Auto-Enrichment:

- If RegionId is **missing** in the snapADDY payload but the matched City has one, the Region is **auto-inferred**.

   City Without Region:

- If snapADDY provides a Region, but the City in DB has **no RegionId**, match is allowed.

6.6   (Optional) German Geo Data Handling via ZIP Code

This feature allows **ZIP-based city resolution** for addresses in **Germany**, enhancing the accuracy of geo data imported from snapADDY into Creatio.

1. **Prerequisites**

To enable ZIP-based city resolution, the following must be met:

a. In Creatio the**, City table must include a string-type ZIP column** with a code name (that includes the word Zip) for example:
   - CreZip
   - UsrZip

If no such column is found, ZIP matching will be **automatically skipped.**

b. The incoming record has "Country: "DE" (Germany)
c. The JSON includes **"GermanCityWithZip": "true"**. This can be configured in the "**snapADDY-Creatio field mappings**" system setting. **After modification, ensure the system setting value is in JSON format to prevent webhook parsing issues.**
d. Example of system setting that includes this optional feature:

```
{
    "email": "Email",
    "organization": "AccountId",
    "phone": "Phone",
    "mobile": "MobilePhone",
    "city": "CityId",
    "zip": "Zip",
    "street": "Address",
    "state": "RegionId",
    "country": "CountryId",
    "position": "JobTitle",
    "firstName": "GivenName",
    "lastName": "Surname",
    "fax": "Account.Fax",
    "gender": "GenderId",
    "website": "Account.Web",
    "GermanCityWithZip": "true"
}
```

2. Matching Logic
   a. Exact ZIP Match -> If only one city in the Creatio City table has that ZIP → it's selected directly.

   b. If multiple cities share the same ZIP ->The system further filters by by `City.Name, Region.`
   c. If no city is matched even after (b), City Name will be stored in Notes field.
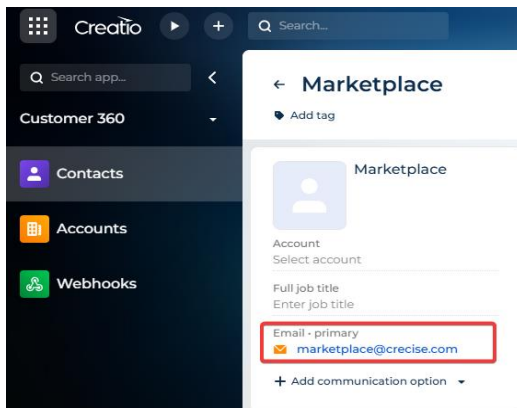
6.6 (Optional) Owner Mapping

1. Prerequisites

   a. To enable this feature the payload should include **"createdBy" = "OwnerId"**
   This can be configured in the "**snapADDY-Creatio field mappings**" system setting. **After modification, ensure the system setting value is in JSON format to prevent webhook parsing issues.**

   b. Example of system setting that includes this optional feature:
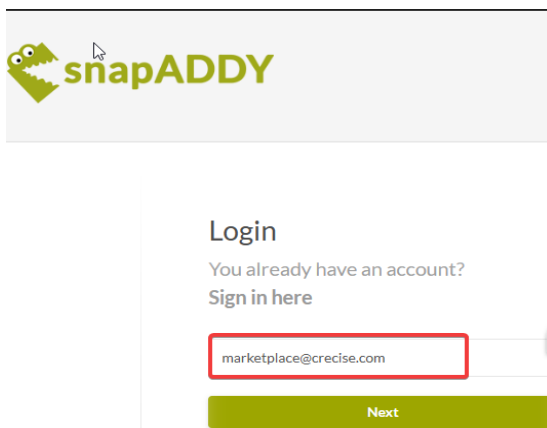
   ```
   {
       "email": "Email",
       "organization": "AccountId",
       "phone": "Phone",
       "mobile": "MobilePhone",
       "city": "CityId",
       "zip": "Zip",
       "street": "Address",
       "state": "RegionId",
       "country": "CountryId",
       "position": "JobTitle",
       "firstName": "GivenName",
       "lastName": "Surname",
       "fax": "Account.Fax",
       "gender": "GenderId",
       "website": "Account.Web",
       "createdBy": "OwnerId"

   }
   ```

   c. Matching logic
   To differentiate the **Owner** of imported Contacts and Accounts from snapADDY, the following logic is applied:
   If a **Contact in Creatio** exists with a **primary email address** that matches the **snapADDY user's email**, then that Contact is automatically assigned as the **Owner** of any imported Contact or Account records.

   - Contact in Creatio

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- **snapADDY user's email,**

- Result on Imported Record

6.7 Gender Lookup

The gender data received from snapADDY uses the following codes:

- 0: Male
- 1: Female
- -1: Not Specified

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To accommodate these specific codes within Creatio, the Gender object has been extended with an additional field: **snapADDY Mapping Value**. This field stores the corresponding snapADDY codes (0, 1, and -1), allowing for accurate mapping between snapADDY data and Creatio.

7. Log Monitoring

- **For SysAdmins:** Monitor successful and unsuccessful mappings by subscribing to `snapADDYWebhookLog`. In Cloud Creatio environments, use the Telemetry Log interface to access and review these logs.

Real-time logging

| All except noisy ☐ | Logger* SnapAddyWebhookLog | Level ▼ | SUBSCRIBE |
| JS query: | | | |