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

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



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 2.01/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)

III Creatio 🕨 🕂	Q Search					:: 🗚 6	• • •
Customer 360 - Q: Search app	← 17320 ● Add tag	All fields are read-	-only since the informati	ion comes from Symitar	U	pdate from symitar	o √ Close 🔒
Contacts	ISMAEL D GUY 10/23/076-47	PORTFOLIO NOTES AND COMMENT	IS JOINT MEMBER	S ADDITIONAL INFO	RMATION WARNINGS		
Legal entities Primary account owner ISMAEL D CUY	Loans 2 : Q	Original Loan	Due Date	Category	Loan Balance	+ :	
	Open date 11/21/2005	2 17320-0110	2/2/2007	5/2/2010 8:00 AM	30 YEAR FIXED MORT	GAGE 419,349.57	
	Close date	i 3 17320-0020 4 17320-0021	3/27/2005	5/21/2010 8:00 AM 4/27/2010 8:00 AM	NEW AUTO	5,292.38 8,167.22	
	Natural Person Member Group 2	Shares 2 : Q	Balance -				
Type General Active Branch 3 Created 9 9999	Type General Membership Account	1 17320-0001	Balance 24,509.15	Opened on 11/21/2005	Column removed	Category	+ :
	Status	2 17320-0020	3,599.06	11/21/2005		CLASSIC CHECKING	
	Branch Branch 3	3 17320-0100	3,106.93	6/21/2009		36 MONTH CERTIFICATE	
	Created By User 9999		viano v			100 00011000	
	Created At Branch Branch 1	Card 2 : Q	Member	Effective Date	Evolution Date	Description	
	Symitar Record Change Date 3/23/2009		Processory	No data	Copración Date	and the second	
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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 Metrix.

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 tryes to find new accounts in Symitar
Update Symitar information on Symitar Account page open	 On Symitar page open. 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