



GUS CONNECTOR USER MANUAL

**Automate and Verify Polish Company
Data in Salesforce with GUS Connector**

GUS Connector

User manual

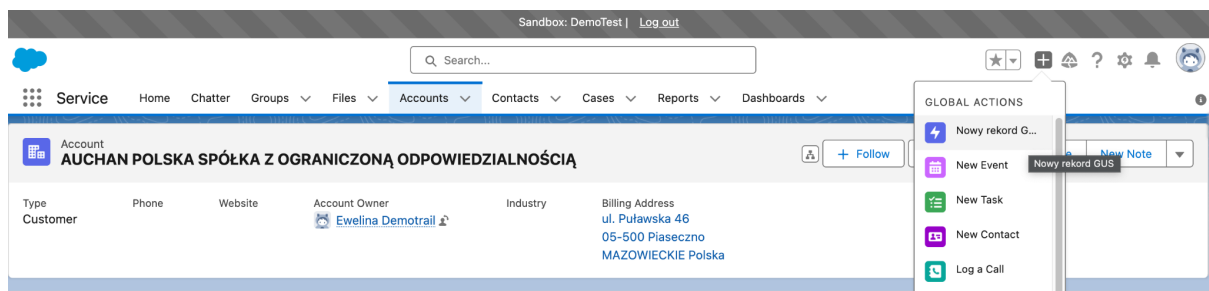
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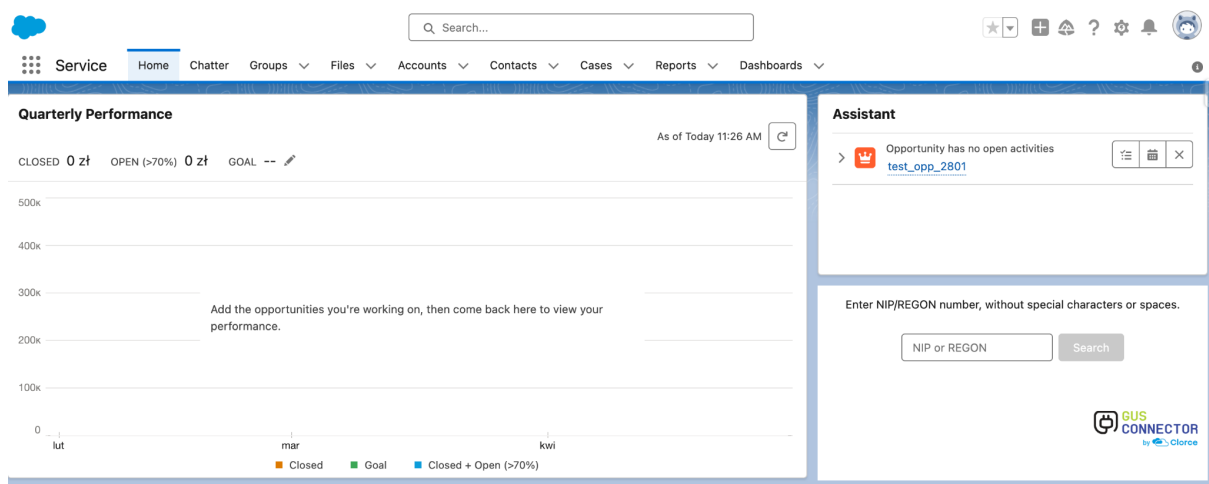
The GUS Connector application is used to retrieve company information from the GUS database based on NIP or REGON numbers and create Lead or Account records in the Salesforce system based on that data. GUS Connector also allows for both single and bulk updates of these records based on the GUS database.

Searching and creating records

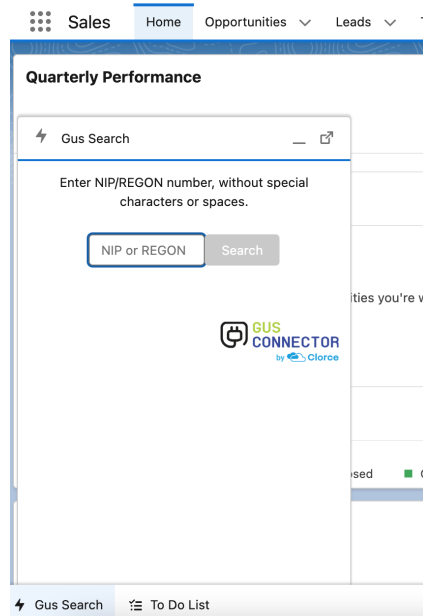
1. To use the application to search for businesses by NIP or REGON number and auto-populate Lead or Account data, after logging into your org:
 - Expand the Global Action menu (in the top-right corner of the screen, the “+” icon, to the left of your profile Avatar).



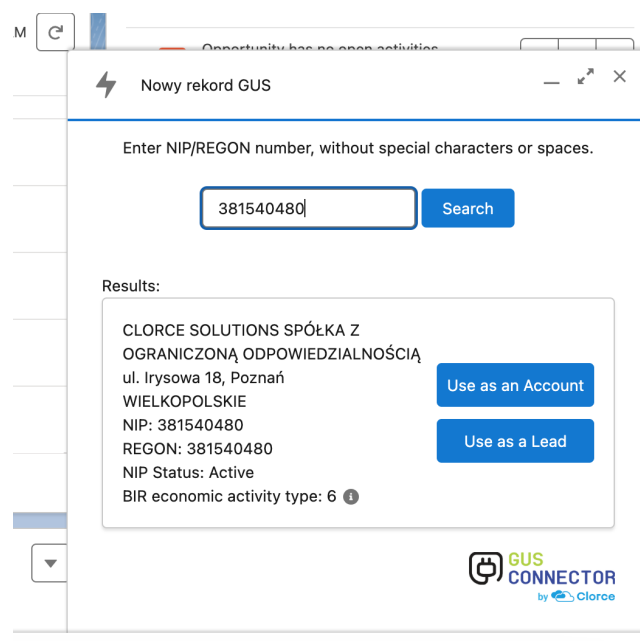
- Select a component from the homepage.



- Or from the Utility Items (the bar at the bottom of the screen), depending on how the application is configured.



2. After opening the application screen, enter the correct value in the NIP or REGON field. Only digits should be entered, but if dashes or hyphens are used, they will be automatically removed to a format of digits only when the Search button is pressed. NIP numbers consist of 10 digits, and REGON numbers consist of 9. If the entered number is valid, the application will automatically recognize which key to use to search the database. If a red message appears after entering the number and clicking the Search button—"Invalid NIP or REGON"—it means that the entered number is incorrect (either the wrong number of digits was entered or non-digit characters were used).
3. Press ENTER or click the Search button.



4. After the search, the application will open a frame with the results displayed in the following layout:

Company Name

Address

NIP

REGON

NIP Status (Active, Repealed, Invalid)

Business Type (from the REGON online database)

Note: The business types according to BIR are not the same as the Polish Classification of Activities (PKD). BIR divides business types into three groups:

- Business subject to registration in CEIDG – silo 1
 - Agricultural activity (farms and/or so-called special agricultural production sectors) – silo 2
 - Activities other than the above (e.g., bailiff office, notary office, agritourism) – silo 3
 - Location of business activity terminated in the old KRUPGN system (National Official Register of Economic Entities) – silo 4
 - Location of business activity of a legal entity (only types P and LP) – silo 6.
5. If a company is found that already exists in the system as an Account or Lead with the same NIP or REGON number, the following message will appear under the search bar:

"We found an existing record with the same NIP number. Show duplicate."

The phrase "Show duplicate" will be an active link to the existing record.

If the company being searched already exists in the system and has more than one record assigned, a message will appear below the search field showing the number of records with the same NIP or REGON number:

"We found multiple existing records with the same NIP number: 3."

This will indicate the number of existing duplicates, but without a link to the created records. The existence of duplicates does not prevent the creation of new records based on the same NIP number, although a warning about the risk of data duplication will also appear when attempting to create a new record.

6. The search results are also subject to the standard Duplicate Rules in Salesforce: Configuration (Setup) → Duplicate Management → Duplicate Rules. The rule can be applied to all fields populated with data from GUS in the Lead and Account objects or work cross-objectively on records of both object types. The duplicate message will appear below the search results in the component (and also, as usual, when attempting to create a record).

SETUP

Duplicate Rules

All Duplicate Rules

What Are Duplicate Rules?

[Expand]

View: All Duplicate Rules

A B C Ć D E F G H I J K L Ł M N O Ó P Q R S Ś T U V W X Y Z Ź Z Other All

New Rule

Rule Name ↑	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
Standard Account duplicate rule	Duplicate Rule for Account records.	Account	Standard Account Matching Rule	☒	EDemo	27.01.2025
Standard Contact duplicate rule	Duplicate Rule for Contact records.	Contact	Standard Contact Matching Rule	☒	EDemo	27.01.2025
Standard Lead duplicate rule	Duplicate Rule for Lead records.	Lead	Standard Lead Matching Rule	☒	EDemo	27.01.2025
Standard Person Account Duplicate Rule	Identify person accounts that duplicate other person accounts.	Person Account	Standard Person Account Matching Rule	☐	autoproc	30.01.2025
Standard Rule for Contacts with Duplicate Leads	Identify contacts with duplicate leads.	Contact	Standard Lead Matching Rule	☐	autoproc	27.01.2025
Standard Rule for Leads with Duplicate Contacts	Identify leads with duplicate contacts.	Lead	Standard Contact Matching Rule	☐	autoproc	27.01.2025

- You can use the searched data to create a Lead or Account record by using the "Use as Account" or "Use as Lead" buttons.

After selecting one of the buttons, the system will proceed to the wizard for the corresponding record. If required, choose the appropriate Record Type and continue to the wizard. The application will automatically populate some of the data with the information obtained from the GUS database. Then, proceed as you would when creating records for an Account or Lead.

If you encounter any issues, please contact your system administrator.

If you do not have the option to create Lead records, it means that you, as a Salesforce user, do not have the appropriate permissions. In this case, please contact the administrator.

New Account

Wybierz Typ Rekordu

☒ Person Account

☐ Enterprise

☐ Small company

Standard, large companies with more than 100 employees.

Standard, small-sized companies with less than 10 employees.

Cancel

Next

Nowe konto: Small company

Informacje o koncie

Właściciel konta

Adres

Telefon

*Nazwa konta

Konto nabywcze

NIP

Status NIP

Typ działalności BR

CLORCE SOLUTIONS SPÓŁKA Z OGRANICZONĄ ODPOW.

7752407444

AKTYWNY

6

REGON

381540480

Informacje dodatkowe

Anuluj

Zapisz i nowy element

Zapisz

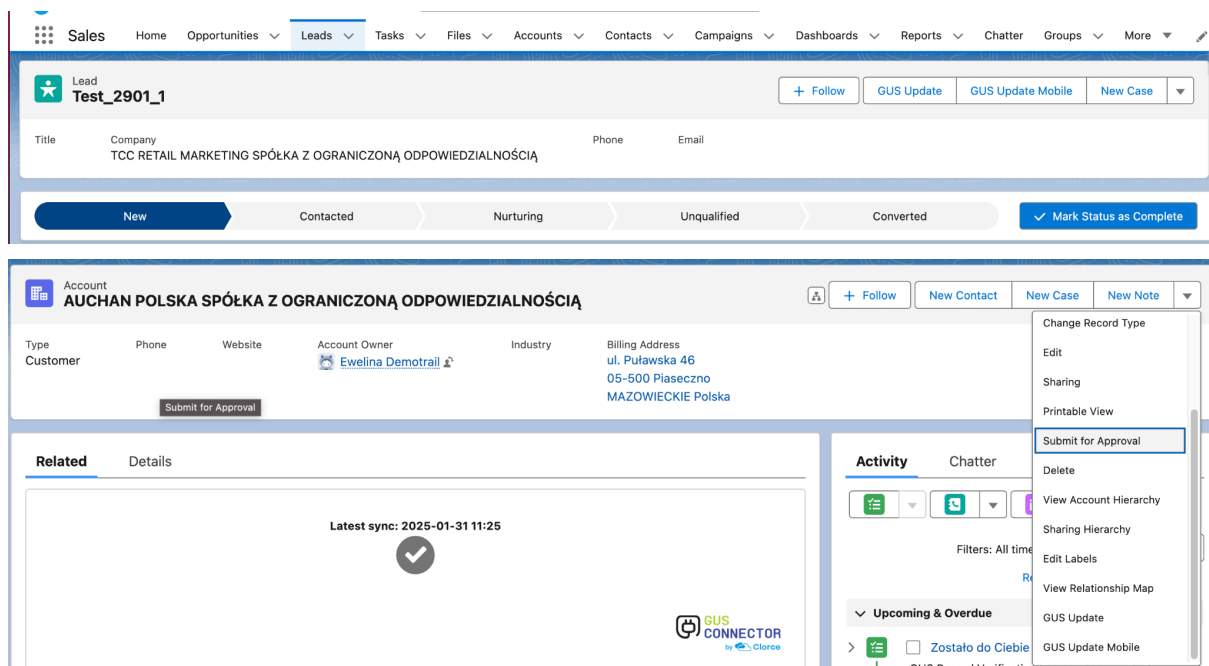
- When creating Lead records, the "Lead Source" field will not be automatically populated with the default value "GUS." You will need to fill in this field manually (starting from version 0.3 of the application).

- When clicking the "Use as Lead" button, a Lead creation form will appear, where only the "Company" field will be populated with the company name from GUS. The "Last Name" field, which is mandatory, will be empty when creating the record. The user must manually enter the data they want to save in this field in order to save the record. In the case of updating a record, only the "Company" field will be updated with the value from GUS, while the "Last Name" field will remain unchanged (starting from version 0.3 of the application).

The following instructions describe the operation of the GUS Connector application configured according to the GUS Connector Installation Guide. Access to certain features requires prior configuration.

GUS data update for existing records.

Updating GUS data for existing Account and Lead records.



- The application allows for the update of data for individual records or bulk updates for groups of both Account and Lead records.
- To update a single record: open the record page (either an Account or Lead), then, on the right side of the record's top panel, click the "Update GUS" button. This will open the record

edit window, and the data fetched from GUS will be automatically overwritten. To save the updated data, click the "Save" button.

Legend: * = Required Information

Account Owner: Ewelina Demotrail

Account Name: AUCHAN POLSKA SPÓŁKA Z OGRANICZONĄ ODPOW

Parent Account: Search Accounts...

Phone: [Empty Field]

Fax: [Empty Field]

Website: [Empty Field]

Additional Information

Type: Customer

Industry: --None--

NIP: 5260309174

Employees: [Empty Field]

Annual Revenue: [Empty Field]

NIP Status: Active

Buttons: Cancel, Save & New, Save

* Due to a bug in Salesforce

<https://salesforce.stackexchange.com/questions/420349/navigationmixin-navigate-to-recordpage-doesnt-update-record-with-defaultfieldva> Currently, on Lead records, you need to pull out the "GUS Update Mobile" button to the layout and use it.

** In the case of Person Accounts, we do not recommend using the "GUS Update" button for updating company record data.

3. Upon opening a single Lead or Account record, automatic data verification is also performed (starting from version 0.3 of the application). If any data changes occur, a red message will appear indicating the change. At the bottom of the page, a table will be displayed showing the fields affected by the change, along with the old and new values. Additionally, two buttons will be available: "Change data" and "Create new task."

Sales Home Opportunities Leads Tasks

Warning
Field values changed in GUS!

Account
AUCHAN POLSKA SPÓŁKA

Type: Customer Phone Website Account Owner: Ewelina Demotrail Industry Billing Address: ul. Puławska 46, 05-500 Piaseczno, MAZOWIECKIE Polska

Related Details

Field differences | Latest sync: 2025-01-31 11:25

Field name	Old value	New value
Name	AUCHAN POLSKA SPÓŁKA	AUCHAN POLSKA SPÓŁKA Z OGRANICZONĄ ODPOWIEDZIALNOŚCIĄ

Create a New Task Change data

Activity Chatter

Filters: All time • All activities • All types

Refresh Expand All View All

Upcoming & Overdue

Zostało do Ciebie pr... Tomorrow
GUS Record Verification has an upcoming task

GUS CONNECTOR by Clorce

- When clicking "Change data," a green message will appear indicating the data change. The page will reload, and the updated values will overwrite the specified fields. At the bottom of the page, instead of the table, a gray icon will appear along with information about the data synchronization time.

Account
AUCHAN POLSKA SPÓŁKA Z OGRANICZONĄ ODPOWIEDZIALNOŚCIĄ

Type: Customer Phone Website Account Owner: Ewelina Demotrail Industry Billing Address: ul. Puławska 46, 05-500 Piaseczno, MAZOWIECKIE Polska

Related Details

Latest sync: 2025-01-31 11:25

GUS CONNECTOR by Clorce

Activity Chatter

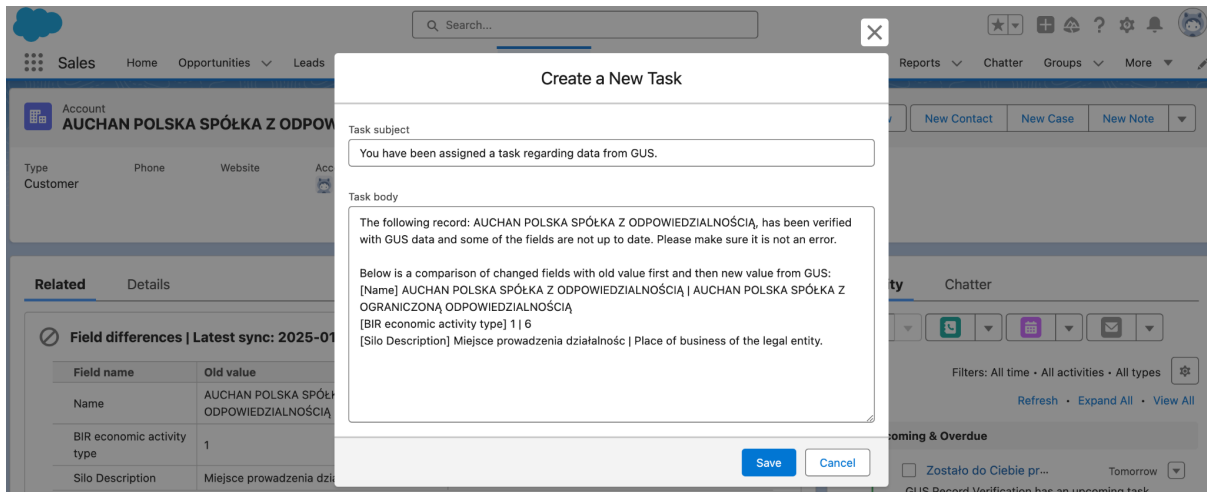
Filters: All time • All activities • All types

Refresh Expand All View All

Upcoming & Overdue

Zostało do Ciebie pr... Tomorrow
GUS Record Verification has an upcoming task

- When clicking "Create new task," a window will appear with the "Title" and "Task Description" fields pre-filled based on the changes that have been recorded.



When clicking "Save," the task will be created and assigned to the GUS Record Verification queue (which should be created manually and assigned to users during the configuration phase). Users in this queue will receive a notification about the pending task. If a user from the queue marks the task as completed, the task creator will receive a notification that the task has been finished. The task completion deadline is 3 days.

6. To update a group of records: in the Account or Lead list view, select the records you want to update (up to 200) and click the "GUS Update" button (on the right side, in the top panel of the list).

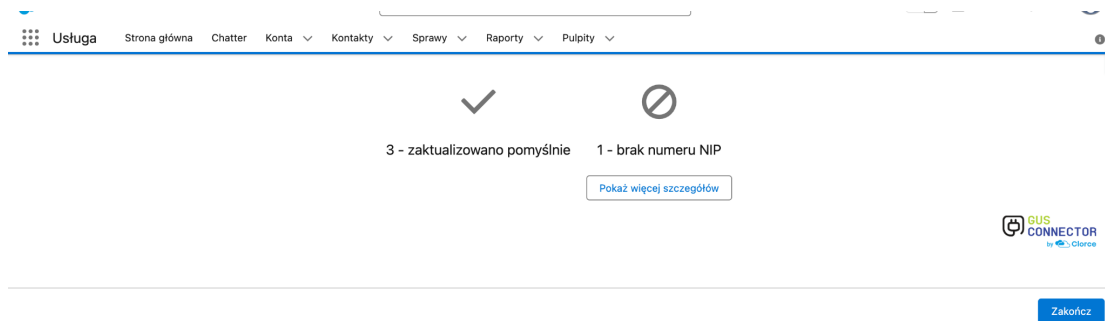
Note! It is best to perform bulk updates when other users are not working on the records being updated (e.g., after office hours).

Note! The update may take some time, as the application needs to connect and search the GUS database. It may also fail if the GUS server is unavailable. In that case, you should repeat the operation at a later time.

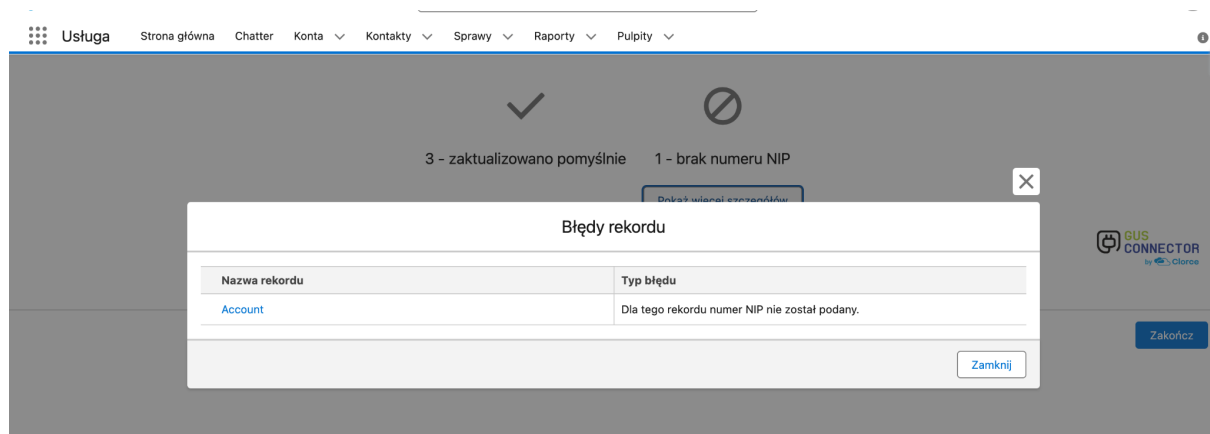
After performing a bulk update, a message will appear with information on whether the process was successful and how many of the requested records were updated. Possible messages include:

- (number of records) - successfully updated,
- (number of records) - missing NIP number,
- (number of records) - NIP number does not exist in the GUS database,
- The server is currently busy, please try again later,
- You do not have permissions to perform the update.

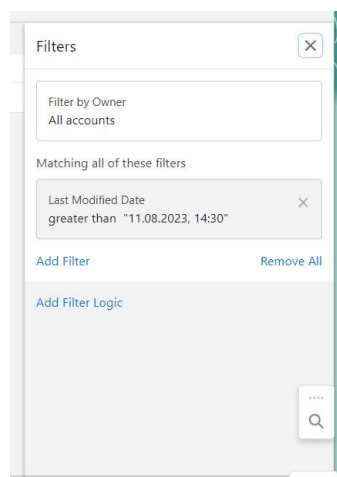
To return to the list view, click the "Finish" button.



Clicking the "Show more details" button will display a list of records that encountered issues during the update, along with informational messages explaining the cause of the error.

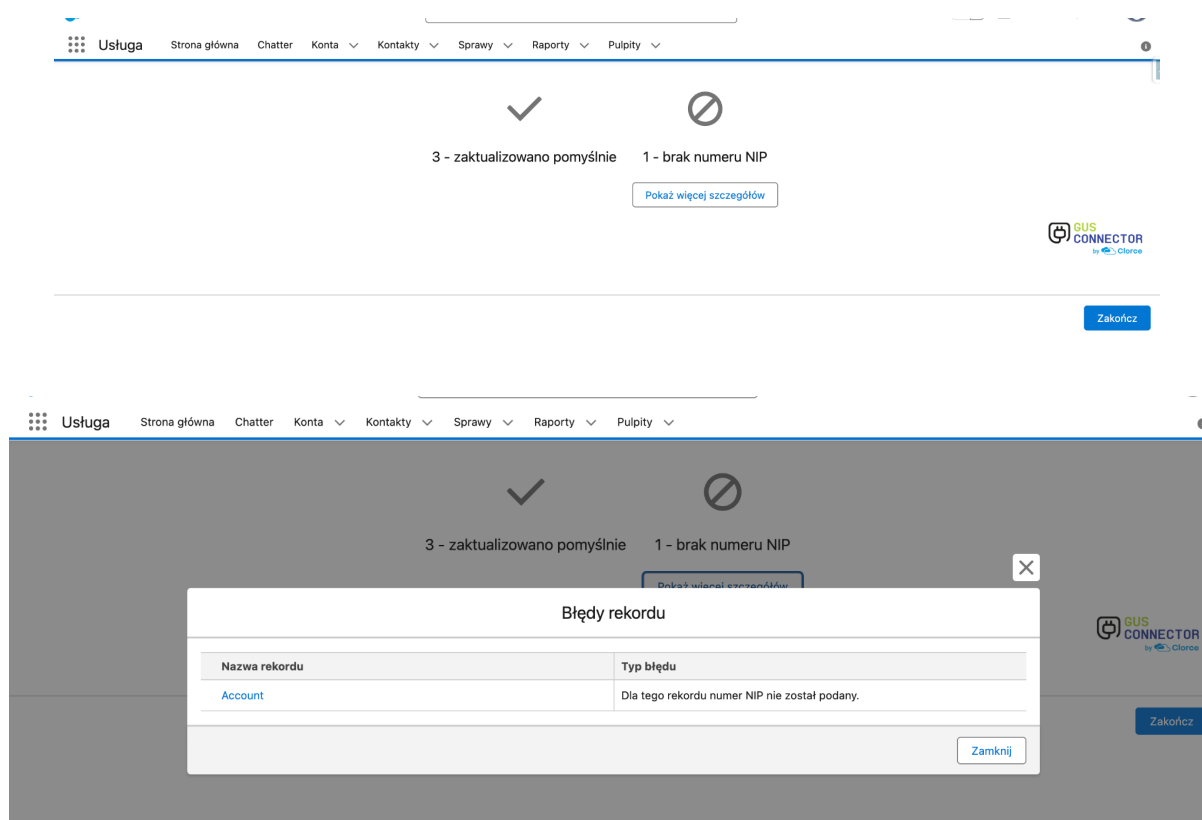


7. In the case of a bulk update where only some records were updated, it is possible to identify the updated data. To do this, immediately after performing the update, you should create a list view based on the "Last Modified Date" field, filtering for records modified recently (e.g., in the last 10 minutes).



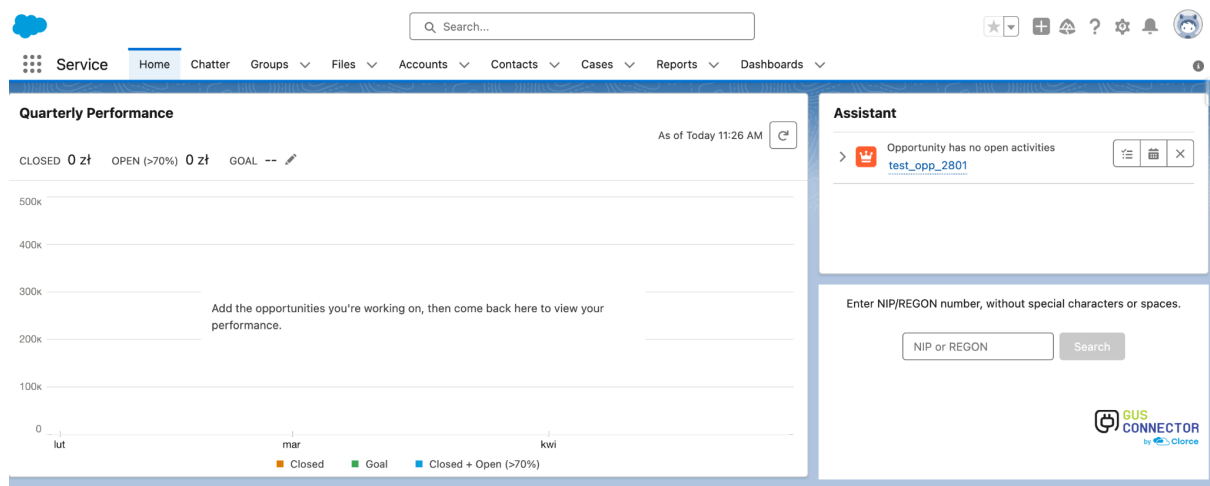
8. In the case of errors and the failure to update some records, below the error messages, a "Show more details" button will appear (starting from version 0.3 of the application). When

clicked, it will display a table with the names of the records that were not updated and information on the specific errors encountered.



Logo in the GUS Connector application (starting from version 0.3 of the application)

The GUS Connector application features a visual logo that includes the name of the plugin and the name of the company responsible for its creation and development. This logo serves as a recognizable brand for the application and helps users easily identify it within the Salesforce environment.



The screenshot shows a window titled 'Nowy rekord GUS' with a lightning bolt icon. Inside the window, there is a text input field labeled 'Enter NIP/REGON number, without special characters or spaces.' Below the input field is a 'Search' button. The 'GUS CONNECTOR by Clorce' logo is displayed in the bottom right corner of the window.

The logo is also visible on the verification component, both when the data is synchronized and when differences are displayed, as well as during bulk updates. This helps users visually identify the application and ensures consistency across different stages of the data processing and update workflow.

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

Person Account
Mr. "CARREFOUR POLSKA" SPÓŁKA Z OGRANICZONĄ ODPOWIEDZIALNOŚCIĄ

+ Follow GUS Update Mobile GUS Update New Contact

Title Phone (2) Email Account Owner
Test user

Related Details

Latest sync: 2025-01-31 11:38

GUS CONNECTOR by Clorce

Activity Chatter

Filters: All time • All activities • All types

Refresh Expand All View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

Sales Home Opportunities Leads Tasks

Warning
Field values changed in GUS!

Account
AUCHAN POLSKA SPÓŁKA

+ Follow New Contact New Case New Note

Type Customer Phone Website Account Owner Ewelina Demotrail Industry Billing Address ul. Puławska 46 05-500 Piaseczno MAZOWIECKIE Polska

Related Details

Field differences | Latest sync: 2025-01-31 11:25

Field name	Old value	New value
Name	AUCHAN POLSKA SPÓŁKA	AUCHAN POLSKA SPÓŁKA Z OGRANICZONĄ ODPOWIEDZIALNOŚCIĄ

Create a New Task Change data

GUS CONNECTOR by Clorce

Activity Chatter

Filters: All time • All activities • All types

Refresh Expand All View All

Upcoming & Overdue

Zostało do Ciebie pr... Tomorrow
GUS Record Verification has an upcoming task

Usługa Strona główna Chatter Konta Kontakty Sprawy Raporty Pulpity

3 - zaktualizowano pomyślnie 1 - brak numeru NIP

Pokaż więcej szczegółów

GUS CONNECTOR by Clorce

Zakończ

By clicking on the logo, users are redirected to the page <https://clorce.com/#kontakt>, where a contact form is available for inquiries and support. This provides an easy way for users to reach out for assistance or further information related to the GUS Connector application.

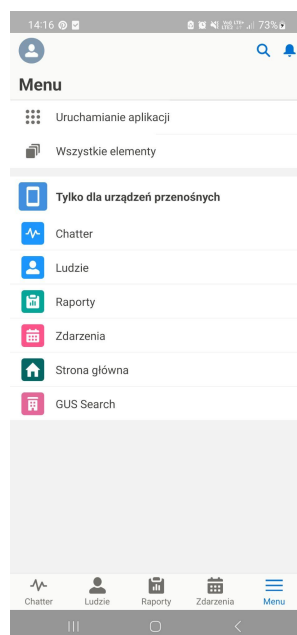
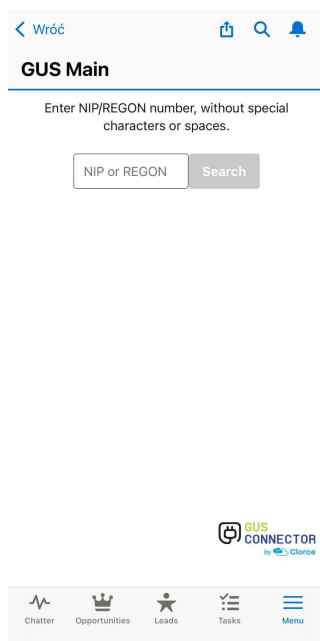
Let's talk!

We are happy to advise you on how Salesforce can help you grow your organization.



GUS Connector for mobile devices

1. The mobile version of GUS Connector allows users to access the GUS Main directly from the application menu. By clicking on **"All Items"**, users can search for **GUS** and then click on **GUS Main** to initiate the search functionality.



2. Just like in the desktop version, the mobile version of GUS Connector allows users to create **Leads** and **Accounts** directly from the search results:

[Wróć](#)   

GUS Main

Enter NIP/REGON number, without special characters or spaces.

Results:

CLORCÉ SOLUTIONS
SPÓŁKA Z OGRANICZONĄ
ODPOWIEDZIALNOŚCIĄ
ul. Irysowa 18, Poznań
WIELKOPOLSKIE
NIP: 7792497444
REGON: 381540480
NIP Status: Active
BIR economic activity type: 6





 Chatter
  Opportunities
  Leads
  Tasks
  Menu

3. You can also update individual **Leads** and **Accounts** records using the Action menu on the specific record pages:


CLORCÉ SOLUTIONS SPÓŁKA Z OGRANICZONĄ ODPOWIEDZIALNOŚCIĄ

Tytuł

Firma CLORCÉ SOLUTIONS SPÓŁKA Z OGRANICZONĄ ODPOWIEDZIALNOŚCIĄ

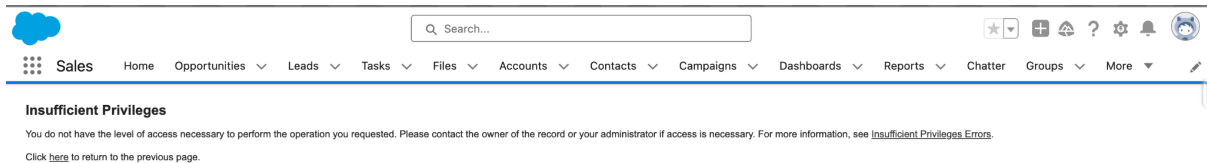
Akcje

 Mobilna Aktualizacja GUS
  Opublikuj
  Plik

4. However, mass record updates cannot be performed using mobile devices.

FAQ Section:

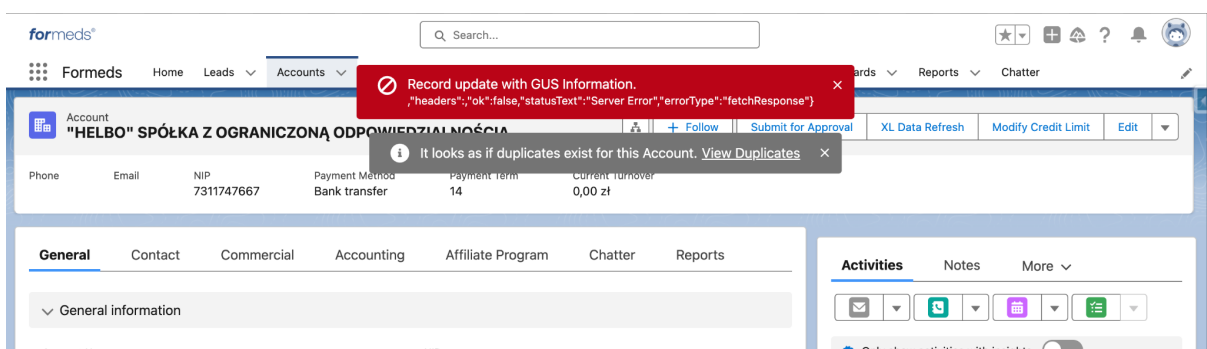
1. The mass update is not working on the Lead and Account objects. When I click on "Mass GUS Update," a screen appears indicating lack of permissions.



- You should check if the user has been assigned a permission set that includes the enabled "Run Flows" option. If not, you need to create a new permission set in Settings, then go to the App Permissions section -> Flow and Flow Orchestration, select the "Run Flows" option, and assign the permission set to the user.

▼ Flow and Flow Orchestration		
Permission Name	Enabled	Description
Enable System Mode Flow Activation	☐	Allows a user to activate system flows.
Manage Flow	☐	Allow users to view, create, edit, delete, and activate all flows and flow types in Lightning Experience apps and Setup.
Manage Orchestration Runs	☐	Cancel, debug, suspend, and resume orchestration runs.
Manage Orchestration Runs and Work Items	☐	Cancel, debug, suspend, and resume orchestration runs and reassign orchestration work items.
Reassign Orchestration Work Items	☐	Reassign orchestration work items.
Run Flows	☒	In this org, run any active flow. In Experience Builder sites, run any active flow that's distributed with the Flow Lightning component.
View Flow Usage and Flow Event Data	☐	Unsupported. Use the View Setup and Configuration permission to let users access flow usage data and flow standard platform event data.
View Orchestration in Automation App	☐	In Lightning Experience apps, allow users to view all orchestration runs, orchestration run-related details, and orchestration definitions, regardless of ownership or sharing settings. Only users who also have the Manage Flow permission can edit an orchestration definition or cancel, debug, suspend, or resume an orchestration run.

2. When accessing the Account or Lead record, where the "GUS Single Verify" component has been added to the layout, an error appears, and the component is not displayed correctly (only the frame and publisher's logo are visible).



- The user must be granted the basic permission set associated with the Single Verification component depending on the object where the error occurs: **GUS Single Verify Account Read** or **GUS Single Verify Lead Read**. If the user also needs to have the ability to edit the

record's verification data, an additional permission set should be added: **GUS Single Verify Account Edit** or **GUS Single Verify Lead Edit**.

3. **The mass update button is not working, or an error appears - GUS Update.**
 - You should check if the user is using a Lightning Page on the Lead or Account object. If they are, you need to add it to the layout and use the GUS Update Mobile / Mobile GUS Update button. This issue is related to a Salesforce bug concerning Dynamic Forms.
4. **In the case of Person Account, it is not recommended to use the button -> GUS Update to update the company record data.**

For technical questions and concerns, please contact us by email at gus@clorce.com, and for sales inquiries (including those related to query volumes) at sales@clorce.com.