QUICK REFERENCE GUIDE
Cases XML Feed

(Version 06-October-2015)

Examples
Example PHP code and XML files should have been included with this document. If not, these can be provided on request.

New Customers / Cases
Records can be added to the system by creating a XML string and posting this to the following URL:
http://www.**YourCRM**.co.uk/XMLReceive.asmx/CaseApplication

The system will return a message to either tell you the reference number of the newly created customer or return an error.

By default records sent in are checked against the system for duplication based on the name and post code. If a posted XML is found to be a duplicate a new customer will not be created.
Note: There are settings within the system to alter this behaviour.

The posted XML will always start with the following three nodes <Application><Cases><Case>. These three are mandatory but all other fields can be left out of your generated XML or just set to a blank value if not used.

To control what type of data is being sent into the system you use the node <CreateCase>. There are four options available:

0 - Create ONLY the Customer (if record does not exist)
1 - Create the Customer and only the Potential Case (Default)
2 - Create the Customer and only the Full Case
3 - Create the Customer and both the Potential Case & Full Case

If using mode 1-3 if the customer already exists (Based on the duplication check) it will create the case against the existing customer.

Multiple cases can be sent in at once by repeating the <case> node and its children.

Updating Customers
Existing customer records in the system can be updated by including the node <AllowUpdate> with the value 1. This will put the XML into update mode so it will only update existing records and not create a new customer.

With this mode you will need to include the node <CustomerReference> and specify the customer reference of the record you wish to update.

If the CustomerReference specified is invalid then the system will return an error message and nothing will be updated.

Note: When using AllowUpdate this won't set a field value to blank if no data was included in the node.

Updating Case Assessors
You can update all cases assessors against a customer record by using the node <UpdateCaseAssessor> with the value 1. If this node is used, the XML will only update case assessors, no other details will be updated.

To use this mode you must also include the following nodes:
<CustomerReference> - so the system knows which customer to update.
<ClaimType> - As case assessors are different per matter type you will need to specify what type of case assessor is being sent in.

The system will update all case assessors that match the ClaimType node, for the specified customer, with the new answers from the XML.

Note: As with updating Customers, this won't set a case assessor answer to blank if no data was included in the node.