FLOWX.AI

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Integrate a customer search in a business flow

Follow the next steps to use the user personal number to perform a search query in the customer management plugin.

1. First make sure the details about customers are indexed in the search engine (for example, elasticSearch).

2. Open
   The fallback content to display on prerendering
   web app and create a
   The fallback content to display on prerendering
   .

3. Add a **Kafka send event** node.

4. Configure the **Kafka send event** node by adding the following elements:

- Kafka topic - defined on the `KAFKA_TOPIC_CUSTOMER_SEARCH_IN`
environment variable

- Message body (example of identifiers for an indexed customers):

Parameters

Custom | From integration

Topics

customerSearchTopic-qa

Message

```
1  {
2      "id": "${clientIdentification.cif}",
3      "cui": "${clientIdentification.uniqueCode}",
4      "firstName": "${clientIdentification.firstName}",
5      "lastName": "${clientIdentification.lastName}",
6      "birthDate": "${clientIdentification.dateOfBirth}",
7      "companyName": "${clientIdentification.identificationData.name}"
8  }
```

Advanced configuration

Show Headers 🔘

```
1  {"processInstanceId": ${processInstanceId}}
```

> ⚠ **INFO**
>
> For more examples of keys, check **Using the customer management
> plugin**.

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5. Add a **Kafka receive event**.

6. Configure the topic on which you want to receive the response from the CRM, on the value of `KAFKA_TOPIC_CUSTOMER_SEARCH_OUT` environment variable.

Data stream topics

| Custom | From integration |

Topic Name

ai.flowx.updates.qa.customer.management.response

Key Name

receiveReply

Response example:

```
"searchResults" : {
    "customers" : [ {
        "id" : "ID3456",
        "firstName" : "Jane Doe",
        "lastName" : "Doe",
        "birthDate" : "27.02.1980",
        "cui" : "1820227103840_84",
        "companyName" : "",
        "clientCategory" : "PF_INTL",
        "clientType" : "PF",
        "idSeries" : "RT",
        "idNumber" : "879948",
        "idDocType" : "CI",
        "idExpiryDate" : "27.02.2023",
        "legalForm" : "",
```

```
      "listId" : "4691602",
      "mobilePhone" : "0711111111",
      "attributes" : null,
      "type" : "PF"}],
   "hasMore" : false,
   "error" : null
}
```

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