

# Kantime Integration

The Kantime integration is a near real-time/direct API integration. What this means is that Kantime sends messages when the “Save” is done in their application to the web-services for the BPE. This is in line with the types of integration that we have with DeVero and HealthCare First. The rest of this document expects that the client account is already setup and prepared to be integrated as well as being configured. What is covers is the message coming in to the BPE Queue, the rules; and the steps to prepare a new client to receive messages from Kantime.

## The Request Message:

The request message is sent on a change (New or Updated record). At that point in time the message is created and sent to the BPE Web-Services ([https://webservices.playmakercrm.com/cas-index.php?queue\\_id=2](https://webservices.playmakercrm.com/cas-index.php?queue_id=2)). With the exception of the “Pwd”, “Key”, and “Value” the messages will be the same for all clients, there are no variations. There are three message types sent that include Account, Contact, and Referral.

## The BPE Processes:

Since the processing is the same for each client, the only things that need to be updated in the rules are the exclude actions and the parameter “AccountsID”. The one area of caution is that the list id for the “Title” was not correct for the Kantime development account. It was set to 21, which is the list id for Contact Rating. This caused the “Title” to not show even though it was in the system. It also caused new “Titles” to be dynamically added since they did not exist. So if the “Title” is not showing for contacts have DevOps check the list id value.

## The integration process steps:

1. Provide the API\_KEY and PWD to Kantime for the customer being integrated.
2. Copy the rules from the Kantime account to the customer’s account.
  - a. Update the Parameter “AccountsID” to the customer’s id
  - b. Update the Exclude Actions to set the appropriate schema for the customer’s exclude tables.
  - c. NOTE: the areas to change are highlighted in the included rules.
3. Ensure that the messages fields are being properly mapped before bring over the history.
  - a. NOTE: It was discussed that Kantime would send the history via the same mechanism so there should not be any additional work required to bring in the history.

## Expected Messages and Associated Rules:

### Account Message:

```
<?xml version="1.0"?>
<Data Pwd="{PWD}" Key="{API_KEY}">
  <Request Name="Kantime Accounts Processing" Object="contact_accounts" Process="Kantime Accounts Processing" Method="Upsert" Sandbox="false"
  Test="false">
    <Records Name="RecordSet">
      <Record Name="Record">
        <Fields Name="FieldSet">
          <Field Name="Account ID" Key="Account ID" Value="3351" />
          <Field Name="Name" Key="Name" Value="1111111111" />
          <Field Name="Marketer" Key="Marketer" Value="" />
        </Fields>
      </Record>
    </Records>
  </Request>
</Data>
```

```

    <Field Name="Marketer ID" Key="Marketer ID" Value="" />
    <Field Name="Work Phone" Key="Work Phone" Value="" />
    <Field Name="Address 1" Key="Address 1" Value="New York" />
    <Field Name="Address 2" Key="Address 2" Value="" />
    <Field Name="City" Key="City" Value="New York" />
    <Field Name="State" Key="State" Value="NY" />
    <Field Name="Zip" Key="Zip" Value="10101" />
    <Field Name="Website" Key="Website" Value="" />
    <Field Name="Additional Notes" Key="Additional Notes" Value="" />
  </Fields>
</Record>
</Records>
</Request>
</Data>

```

## Account Rule:

```

<?xml version="1.0"?>
<Root Name="Kantime Accounts Processing" Object="contact_accounts" LogLevel="15">
  <Information Purpose="Default rules for processing new Accounts into PlayMaker CRM" Client="New KanTime Client">
    <Audit Why="Created" Who="LAT" Where="All" What="Created" When="2016-01-20T00:00:00Z"/>
  </Information>
  <Definition>
    <ParameterBlock>
      <Parameters>
        <Parameter Name="AccountsID" CommandName="SetParam" Command="20095"/>
      </Parameters>
    </ParameterBlock>
    <RuleBlock>
      <!--Excluding Rules-->
      <Rule Name="RecordExcluded" Field="Exclude_Result" Op="EqualTo" Value="1" Message="This record was excluded."/>
      <Rule Name="BogusRule" Field="Exclude_Result" Op="EqualTo" Value="1" Message="This rule should always fail"/>
    </RuleBlock>
    <ActionBlock>
      <!--Actions to Exclude records already sent to PlayMaker.-->
      <Action Action="Exclude" Name="Act_ExcludeAccount">
        <Args>
          <Arg Name="Exclude_Table" Key="Exclude_Table" Value="BPE:pm20095.Excluded_Accounts"/>
          <Arg Name="Id_Field" Key="Id_Field" Value="Account ID"/>
        </Args>
      </Action>
      <Action Action="Fail" Name="Act_DoNothing" Rule="BogusRule"/>
      <!--Basic Mapping Rule-->
      <Action Action="Set" Name="Act_MapFields">
        <Args>
          <Arg Name="sync_id" Key="sync_id" Value="[Account ID]"/>
          <Arg Name="name" Key="name" Value="[Name]"/>
          <Arg Name="user_sync_id" Key="user_sync_id" Value="[Marketer ID]"/>
          <Arg Name="phone_1" Key="phone_1" Value="[Work Phone]"/>
          <Arg Name="address_1" Key="address_1" Value="[Address 1]"/>
          <Arg Name="address_2" Key="address_2" Value="[Address 2]"/>
          <Arg Name="city" Key="city" Value="[City]"/>
          <Arg Name="state" Key="state" Value="[State]"/>
          <Arg Name="zip" Key="zip" Value="[Zip]"/>
          <Arg Name="website" Key="website" Value="[Website]"/>
          <Arg Name="additional_notes" Key="additional_notes" Value="[Additional Notes]"/>
        </Args>
      </Action>
      <!--User Look-up this will have to be updated if the users have multiple sync_ids-->
      <Action Action="Get" Name="Act_UserLookup">

```

```

    <Args>
      <Arg Name="Object" Key="Object" Value="public.users"/>
      <Arg Name="Field" Key="Field" Value="id"/>
      <Arg Name="MatchOn" Key="MatchOn" Value="sync_id"/>
      <Arg Name="MatchWith" Key="MatchWith" Value="user_sync_id"/>
      <Arg Name="Var" Key="Var" Value="users_id"/>
      <Arg Name="JoinWith" Key="JoinWith" Value="And"/>
    </Args>
  </Action>
</ActionBlock>
</Definition>
<Logic>
  <!--Exclude Results-->
  <Sequence OnError="Break" Name="Account Excluding" ErrorAction="">
    <Step Name="Step_ExcludeAccount" Action="Act_ExcludeAccount"/>
    <JumpTo Name="Jump_ExcludedAccount" Destination="Record Excluded" Rule="RecordExcluded"/>
  </Sequence>
  <Sequence OnError="Break" Name="Account Processing" ErrorAction="">
    <Step Name="Step_MapFields" Action="Act_MapFields" />
    <Step Name="Step_UserLookup" Action="Act_UserLookup" />
  </Sequence>
  <Sequence OnError="Break" Name="Record Excluded" ErrorAction="">
    <Step Name="Step_DoNothing" Action="Act_DoNothing"/>
  </Sequence>
</Logic>
</Root>

```

## Contact Message:

```

<?xml version="1.0"?>
<Data Pwd="{PWD}" Key="{API_KEY}">
  <Request Name="Kantime Contacts Processing" Object="contacts" Process="Kantime Contacts Processing" Method="Upsert" Sandbox="false" Test="false">
    <Records Name="RecordSet">
      <Record Name="Record">
        <Fields Name="FieldSet">
          <Field Name="Contact ID" Key="Contact ID" Value="22411" />
          <Field Name="First Name" Key="First Name" Value="Atilio" />
          <Field Name="Middle Name" Key="Middle Name" Value="" />
          <Field Name="Last Name" Key="Last Name" Value="Abreu" />
          <Field Name="Marketer" Key="Marketer" Value="" />
          <Field Name="Marketer ID" Key="Marketer ID" Value="" />
          <Field Name="Associated Facility" Key="Associated Facility" Value="" />
          <Field Name="Associated Facility ID" Key="Associated Facility ID" Value="" />
          <Field Name="Title" Key="Title" Value="MD" />
          <Field Name="Assistant" Key="Assistant" Value="" />
          <Field Name="NPI" Key="NPI" Value="1407087323" />
          <Field Name="Work Phone" Key="Work Phone" Value="(214) 884-1584" />
          <Field Name="Mobile Phone" Key="Mobile Phone" Value="" />
          <Field Name="Address 1" Key="Address 1" Value="5334 Ross Ave." />
          <Field Name="Address 2" Key="Address 2" Value="Suite 900A" />
          <Field Name="City" Key="City" Value="Dallas" />
          <Field Name="State" Key="State" Value="TX" />
          <Field Name="Zip" Key="Zip" Value="75206" />
          <Field Name="EMail" Key="EMail" Value="" />
          <Field Name="Website" Key="Website" Value="" />
          <Field Name="Additional Notes" Key="Additional Notes" Value="" />
        </Fields>
      </Record>
    </Records>
  </Request>

```

</Data>

## Contact Rule:

```
<?xml version="1.0"?>
<Root Name="Kantime Contacts Processing" Object="contacts" LogLevel="15">
  <Information Purpose="Default rules for processing new Contacts into PlayMaker CRM" Client="New KanTime Client">
    <Audit Why="Created" Who="LAT" Where="All" What="Created" When="2016-01-20T00:00:00Z"/>
  </Information>
  <Definition>
    <ParameterBlock>
      <Parameters>
        <Parameter Name="AccountsID" CommandName="SetParam" Command="20095"/>
      </Parameters>
    </ParameterBlock>
    <RuleBlock>
      <!--Excluding Rules-->
      <Rule Name="RecordExcluded" Field="Exclude_Result" Op="EqualTo" Value="1" Message="This record was excluded."/>
      <Rule Name="BogusRule" Field="Exclude_Result" Op="EqualTo" Value="1" Message="This rule should always fail"/>
    </RuleBlock>
    <ActionBlock>
      <!--Actions to Exclude records already sent to PlayMaker.-->
      <Action Action="Exclude" Name="Act_ExcludeContact">
        <Args>
          <Arg Name="Exclude_Table" Key="Exclude_Table" Value="BPE:pm20095.Excluded_Contacts"/>
          <Arg Name="Id_Field" Key="Id_Field" Value="Contact ID"/>
        </Args>
      </Action>
      <Action Action="Fail" Name="Act_DoNothing" Rule="BogusRule"/>
      <!--Basic Mapping Rule-->
      <Action Action="Set" Name="Act_MapFields">
        <Args>
          <Arg Name="sync_id" Key="sync_id" Value="[Contact ID]"/>
          <Arg Name="first_name" Key="first_name" Value="[First Name]"/>
          <Arg Name="middle_name" Key="middle_name" Value="[Middle Name]"/>
          <Arg Name="last_name" Key="last_name" Value="[Last Name]"/>
          <Arg Name="user_sync_id" Key="user_sync_id" Value="[Marketer ID]"/>
          <Arg Name="acct_sync_id" Key="acct_sync_id" Value="[Associated Facility ID]"/>
          <Arg Name="title" Key="title" Value="[Title]"/>
          <Arg Name="assistant" Key="assistant" Value="[Assistant]"/>
          <Arg Name="npi" Key="npi" Value="[NPI]"/>
          <Arg Name="work" Key="work" Value="[Work Phone]"/>
          <Arg Name="mobile" Key="mobile" Value="[Mobile Phone]"/>
          <Arg Name="address_1" Key="address_1" Value="[Address 1]"/>
          <Arg Name="address_2" Key="address_2" Value="[Address 2]"/>
          <Arg Name="city" Key="city" Value="[City]"/>
          <Arg Name="state" Key="state" Value="[State]"/>
          <Arg Name="zip" Key="zip" Value="[Zip]"/>
          <Arg Name="email" Key="email" Value="[EMail]"/>
          <Arg Name="website" Key="website" Value="[Website]"/>
          <Arg Name="additional_notes" Key="additional_notes" Value="[Additional Notes]"/>
        </Args>
      </Action>
      <!--User Look-up this will have to be updated if the users have multiple sync_ids-->
      <Action Action="Get" Name="Act_UserLookup">
        <Args>
          <Arg Name="Object" Key="Object" Value="public.users"/>
          <Arg Name="Field" Key="Field" Value="id"/>
          <Arg Name="MatchOn" Key="MatchOn" Value="sync_id"/>
          <Arg Name="MatchWith" Key="MatchWith" Value="user_sync_id"/>
        </Args>
      </Action>
    </ActionBlock>
  </Definition>
</Root>
```

```

        <Arg Name="Var" Key="Var" Value="users_id"/>
        <Arg Name="JoinWith" Key="JoinWith" Value="And"/>
    </Args>
</Action>
<!--Account Look-up -->
<Action Action="Get" Name="Act_AcctLookup">
    <Args>
        <Arg Name="Object" Key="Object" Value="contact_accounts"/>
        <Arg Name="Field" Key="Field" Value="id"/>
        <Arg Name="MatchOn" Key="MatchOn" Value="sync_id"/>
        <Arg Name="MatchWith" Key="MatchWith" Value="acct_sync_id"/>
        <Arg Name="Var" Key="Var" Value="contact_accounts_id"/>
        <Arg Name="JoinWith" Key="JoinWith" Value="And"/>
    </Args>
</Action>
</ActionBlock>
</Definition>
<Logic>
    <!--Exclude Results-->
    <Sequence OnError="Break" Name="Contact Excluding" ErrorAction="">
        <Step Name="Step_ExcludeContact" Action="Act_ExcludeContact"/>
        <JumpTo Name="Jump_ExcludedContact" Destination="Record Excluded" Rule="RecordExcluded"/>
    </Sequence>
    <Sequence OnError="Break" Name="Contact Processing" ErrorAction="">
        <Step Name="Step_MapFields" Action="Act_MapFields" />
        <Step Name="Step_UserLookup" Action="Act_UserLookup" />
        <Step Name="Step_AcctLookup" Action="Act_AcctLookup" />
    </Sequence>
    <Sequence OnError="Break" Name="Record Excluded" ErrorAction="">
        <Step Name="Step_DoNothing" Action="Act_DoNothing"/>
    </Sequence>
</Logic>
</Root>

```

## Referral Message:

```

<?xml version="1.0"?>
<Data Pwd="{PWD}" Key="{API_KEY}">
    <Request Name="Kantime Referrals Processing" Object="referrals" Process="Kantime Referrals Processing" Method="Upsert" Sandbox="false" Test="false">
        <Records Name="RecordSet">
            <Record Name="Record">
                <Fields Name="FieldSet">
                    <Field Name="Referral ID" Key="Referral ID" Value="35066" />
                    <Field Name="Marketer" Key="Marketer" Value="Alan Christian" />
                    <Field Name="Marketer ID" Key="Marketer ID" Value="37" />
                    <Field Name="Contact" Key="Contact" Value="Testing Physician" />
                    <Field Name="Contact ID" Key="Contact ID" Value="27863" />
                    <Field Name="Account" Key="Account" Value="QWERTYT" />
                    <Field Name="Account ID" Key="Account ID" Value="3349" />
                    <Field Name="Date Entered" Key="Date Entered" Value="01/01/2016" />
                    <Field Name="Notes" Key="Notes" Value="" />
                    <Field Name="Referral Status" Key="Referral Status" Value="Admit" />
                    <Field Name="Insurance Type" Key="Insurance Type" Value="Medicaid" />
                    <Field Name="Insurance Plan" Key="Insurance Plan" Value="Aetna CHIP" />
                    <Field Name="Start of Care Date" Key="Start of Care Date" Value="01/01/2016" />
                    <Field Name="Attending Physician Name" Key="Attending Physician Name" Value="Testing Physician" />
                    <Field Name="Attending Physician NPI" Key="Attending Physician NPI" Value="2134367572" />
                    <Field Name="Non-Admit Date" Key="Non-Admit Date" Value="" />
                    <Field Name="Non-Admit Reason" Key="Non-Admit Reason" Value="" />
                    <Field Name="Non-Admit Reason Details" Key="Non-Admit Reason Details" Value="" />
                </Fields>
            </Record>
        </Records>
    </Request>
</Data>

```

```

    <Field Name="Office" Key="Office" Value="Small Hands, Big Hearts Pediatric Therapy Management, LLC" />
    <Field Name="Business Unit" Key="Business Unit" Value="PT" />
    <Field Name="Referral Source" Key="Referral Source" Value="Facility" />
    <Field Name="Referral Source Category" Key="Referral Source Category" Value="Facility" />
    <Field Name="Patient Name" Key="Patient Name" Value="Calvin Klien" />
    <Field Name="Patient ID" Key="Patient ID" Value="3046" />
    <Field Name="Discharge Date" Key="Discharge Date" Value="" />
    <Field Name="Referral Source NPI" Key="Referral Source NPI" Value="" />
  </Fields>
</Record>
</Records>
</Request>
</Data>

```

## Referral Rule:

```

<?xml version="1.0"?>
<Root Name="Kantime Referrals Processing" Object="referrals" LogLevel="15">
  <Information Purpose="Default rules for processing new Referrals into PlayMaker CRM" Client="New KanTime Client">
    <Audit Why="Created" Who="LAT" Where="All" What="Created" When="2016-01-20T00:00:00Z"/>
  </Information>
  <Definition>
    <ParameterBlock>
      <Parameters>
        <Parameter Name="AccountsID" CommandName="SetParam" Command="20095"/>
      </Parameters>
    </ParameterBlock>
    <RuleBlock>
      <!--Excluding Rules-->
      <Rule Name="RecordExcluded" Field="Exclude_Result" Op="EqualTo" Value="1" Message="This record was excluded."/>
      <Rule Name="BogusRule" Field="Exclude_Result" Op="EqualTo" Value="1" Message="This rule should always fail"/>
      <Rule Name="NoReferringPerson" Field="referring_person" Op="NotSet" Value="" Message="There is a referring person if the referring_person is set"/>
    </RuleBlock>
    <ActionBlock>
      <!--Actions to Exclude records already sent to PlayMaker.-->
      <Action Action="Exclude" Name="Act_ExcludeReferral">
        <Args>
          <Arg Name="Exclude_Table" Key="Exclude_Table" Value="BPE:pm20095.Excluded_Referrals"/>
          <Arg Name="Id_Field" Key="Id_Field" Value="Referral ID"/>
        </Args>
      </Action>
      <Action Action="Fail" Name="Act_DoNothing" Rule="BogusRule"/>
      <!--Basic Mapping Rule-->
      <Action Action="Set" Name="Act_MapFields">
        <Args>
          <Arg Name="sync_id" Key="sync_id" Value="[Referral ID]"/>
          <Arg Name="user_sync_id" Key="user_sync_id" Value="[Marketer ID]"/>
          <Arg Name="con_sync_id" Key="con_sync_id" Value="[Contact ID]"/>
          <Arg Name="acct_sync_id" Key="acct_sync_id" Value="[Account ID]"/>
          <Arg Name="date_entered" Key="date_entered" Value="[Date Entered]"/>
          <Arg Name="notes" Key="notes" Value="[Notes]"/>
          <Arg Name="referral_status" Key="referral_status" Value="[Referral Status]"/>
          <Arg Name="insurance_type" Key="insurance_type" Value="[Insurance Type]"/>
          <Arg Name="insurance_plan" Key="insurance_plan" Value="[Insurance Plan]"/>
          <Arg Name="soc_date" Key="soc_date" Value="[Start of Care Date]"/>
          <Arg Name="attending_physician_npi" Key="attending_physician_npi" Value="[Attending Physician NPI]"/>
          <Arg Name="reject_date" Key="reject_date" Value="[Non-Admit Date]"/>
          <Arg Name="reject_reason" Key="reject_reason" Value="[Non-Admit Reason]"/>
          <Arg Name="reject_reason_details" Key="reject_reason_details" Value="[Non-Admit Reason Details]"/>
        </Args>
      </Action>
    </ActionBlock>
  </Definition>

```

```

    <Arg Name="office" Key="office" Value="[Office]"/>
    <Arg Name="business_unit" Key="business_unit" Value="[Business Unit]"/>
    <Arg Name="patient_name" Key="patient_name" Value="[Patient Name]"/>
    <Arg Name="patient_id" Key="patient_id" Value="[Patient ID]"/>
    <Arg Name="discharge_date" Key="discharge_date" Value="[Discharge Date]"/>
    <Arg Name="referral_source" Key="referral_source" Value="[Referral Source]"/>
    <Arg Name="referral_source_category" Key="referral_source_category" Value="[Referral Source Category]"/>
    <Arg Name="referral_source_npi" Key="referral_source_npi" Value="[Referral Source NPI]"/>
  </Args>
</Action>
<!--User Look-up this will have to be updated if the users have multiple sync_ids-->
<Action Action="Get" Name="Act_UserLookup">
  <Args>
    <Arg Name="Object" Key="Object" Value="public.users"/>
    <Arg Name="Field" Key="Field" Value="id"/>
    <Arg Name="MatchOn" Key="MatchOn" Value="sync_id"/>
    <Arg Name="MatchWith" Key="MatchWith" Value="user_sync_id"/>
    <Arg Name="Var" Key="Var" Value="users_id"/>
    <Arg Name="JoinWith" Key="JoinWith" Value="And"/>
  </Args>
</Action>
<!--Account Look-up -->
<Action Action="Get" Name="Act_AcctLookup">
  <Args>
    <Arg Name="Object" Key="Object" Value="contact_accounts"/>
    <Arg Name="Field" Key="Field" Value="id"/>
    <Arg Name="MatchOn" Key="MatchOn" Value="sync_id"/>
    <Arg Name="MatchWith" Key="MatchWith" Value="acct_sync_id"/>
    <Arg Name="Var" Key="Var" Value="contact_accounts_id"/>
    <Arg Name="JoinWith" Key="JoinWith" Value="And"/>
  </Args>
</Action>
<!-- Contact Look-Up -->
<Action Action="Get" Name="Act_ConLookup">
  <Args>
    <Arg Name="Object" Key="Object" Value="contacts"/>
    <Arg Name="Field" Key="Field" Value="id"/>
    <Arg Name="MatchOn" Key="MatchOn" Value="sync_id"/>
    <Arg Name="MatchWith" Key="MatchWith" Value="con_sync_id"/>
    <Arg Name="Var" Key="Var" Value="referring_person"/>
    <Arg Name="JoinWith" Key="JoinWith" Value="And"/>
  </Args>
</Action>
<Action Action="Get" Name="Act_AttnLookup">
  <Args>
    <Arg Name="Object" Key="Object" Value="contacts"/>
    <Arg Name="Field" Key="Field" Value="id"/>
    <Arg Name="MatchOn" Key="MatchOn" Value="npi"/>
    <Arg Name="MatchWith" Key="MatchWith" Value="attending_physician_npi"/>
    <Arg Name="Var" Key="Var" Value="contacts_id"/>
    <Arg Name="JoinWith" Key="JoinWith" Value="And"/>
  </Args>
</Action>
<Action Action="Get" Name="Act_RefSrcLookup">
  <Args>
    <Arg Name="Object" Key="Object" Value="contacts"/>
    <Arg Name="Field" Key="Field" Value="id"/>
    <Arg Name="MatchOn" Key="MatchOn" Value="npi"/>
    <Arg Name="MatchWith" Key="MatchWith" Value="referral_source_npi"/>
    <Arg Name="Var" Key="Var" Value="referring_person"/>
    <Arg Name="JoinWith" Key="JoinWith" Value="And"/>
  </Args>
</Action>

```

```

    </Args>
</Action>
<!-- Territory Lookup -->
<Action Action="Get" Name="Act_BusinessUnitLookup">
    <Args>
        <Arg Name="Object" Key="Object" Value="business_line"/>
        <Arg Name="Field" Key="Field" Value="id"/>
        <Arg Name="MatchOn" Key="MatchOn" Value="name"/>
        <Arg Name="MatchWith" Key="MatchWith" Value="business_unit"/>
        <Arg Name="Var" Key="Var" Value="business_line_id"/>
        <Arg Name="JoinWith" Key="JoinWith" Value="And"/>
        <Arg Name="HasStatus" Key="HasStatus" Value="FALSE" />
    </Args>
</Action>
<Action Action="Get" Name="Act_TerritoryLookup">
    <Args>
        <Arg Name="Object" Key="Object" Value="territory"/>
        <Arg Name="Field" Key="Field" Value="id"/>
        <Arg Name="MatchOn" Key="MatchOn" Value="sync_id"/>
        <Arg Name="MatchWith" Key="MatchWith" Value="office"/>
        <Arg Name="Var" Key="Var" Value="territory_id"/>
        <Arg Name="JoinWith" Key="JoinWith" Value="And"/>
        <Arg Name="HasStatus" Key="HasStatus" Value="FALSE" />
    </Args>
</Action>
</ActionBlock>
</Definition>
<Logic>
    <!--Exclude Results-->
    <Sequence OnError="Break" Name="Referral Excluding" ErrorAction="">
        <Step Name="Step_ExcludeRefferal" Action="Act_ExcludeReferral"/>
        <JumpTo Name="Jump_ExcludedReferral" Destination="Record Excluded" Rule="RecordExcluded"/>
    </Sequence>
    <Sequence OnError="Break" Name="Referral Processing" ErrorAction="">
        <Step Name="Step_MapFields" Action="Act_MapFields" />
        <Step Name="Step_UserLookup" Action="Act_UserLookup" />
        <Step Name="Step_AcctLookup" Action="Act_AcctLookup" />
        <Step Name="Step_AttnLookup" Action="Act_AttnLookup" />
        <Step Name="Step_ConLookup" Action="Act_ConLookup" />
        <Step Name="Step_RefSrcLookup" Action="Act_RefSrcLookup" Rule="NoReferringPerson" />
        <Step Name="Step_BusinessLineLookup" Action="Act_BusinessUnitLookup" />
        <Step Name="Step_TerritoryLookup" Action="Act_TerritoryLookup" />
    </Sequence>
    <Sequence OnError="Break" Name="Record Excluded" ErrorAction="">
        <Step Name="Step_DoNothing" Action="Act_DoNothing"/>
    </Sequence>
</Logic>
</Root>

```